

Direct costs. Direct costs are project-specific costs included in the budget. Standard direct costs are salaries and wages (personnel), fringe benefits, travel, supplies, consultants, copy/mail, research subjects, tuition remission, normals, and support services (if applicable).

Fringe benefits. Fringe benefit rates vary by employee classification. Classifications and rates are established by UW-Madison. In recent years, fringe benefit rates have increased every year around July 1. Rates cover the following employee benefits: income continuation, unemployment compensation, worker's compensation, social security, Medicare, health insurance, life insurance, and retirement. Current rates can be found on the Web at www.rsp.wisc.edu/rates/index.html.

Normals. For all projects administered through WCER, "normal" service charges are included in the budget's direct costs as Computer Support and eServices. These services are calculated per budgeted full-time equivalent (FTE), and the rates are based on past WCER accounting data. They include:

- Hardware acquisition, consultation, and setup; installation and upgrading of software; end-user training; access and management on a local area network; troubleshooting of hardware and software; and day-to-day technical assistance.
- A variety of technical and creative services including Web sites and applications, video, multimedia, technical writing, and graphic design.
- Server space, data security and encryption, code review, database performance tuning, and application and database programming.

Personnel Activity Report (PAR). This report represents an after-the-fact certification of an individual's actual work effort. The PAR is designed to gather effort-related data as required by the U.S. Office of Management and Budget Circular A-21. Employees who are paid by federally sponsored projects, or are provided to such projects on a cost-sharing basis, are required to complete a PAR.

Support services. When we are not allowed to charge the federally approved overhead rate on an award, we include support services in the direct costs. Support services cover the following project support costs: administration of grants, contracts, subcontracts, and agreements; budget consultation and preparation; programmatic accounting; financial reporting/monitoring; fiscal consultation; personnel services/activities; policy, procedure, and regulation consultation; expenditure audit/review; facility management; equipment management; mail and shipment delivery; administrative professionals management; normal equipment service; normal telephone installation/rental; and normal editorial service.

Tuition remission. UW-Madison assesses a graduate tuition remission charge for research assistants and project/program assistants paid on funds from trusts, gifts, grants, and contracts. Tuition remission is a mandatory charge and may not be waived. Currently, this charge is calculated at a rate of \$8,000 per graduate student per academic year. This charge is standard for all graduate assistants at UW-Madison.

Classified employee. An employee in a classified civil service position that must be pre-approved by the SoE and is under the auspices of a union bargaining unit composed of related job classifications. The administrative professionals—called University Services Associates (USAs)—are an example of classified employees.

Classified employee–project. An employee in a classified position that must be pre-approved by the SoE and is used to accommodate a temporary workload increase that has an established probable termination date. State statute limits the duration of project positions to a maximum of 4 years.

Limited term employee (LTE). An employee in a short-term classified position that must be pre-approved by the SoE. LTE appointments cannot exceed 1044 hours per year. Salaries are equal to or less than the title-range minimum.

Project assistant (PA). A graduate student enrolled at the UW-Madison who is employed to assist with research, training, or other academic programs or projects at the university.

Research assistant (RA). A graduate student engaged in research that is primarily for the benefit of the student's course of study or research.

Student hourly. An undergraduate or graduate student enrolled at the UW-Madison whose responsibilities (e.g., clerical tasks) do not require an undergraduate degree.

Unclassified employee. Unclassified employees include faculty, academic staff, limited appointees, employees-in-training, student assistants, and student hourly employees. These employees' appointments are covered by specific policies, not by classified civil service policies.

**BUILDING/SPACE/SUPPLIES****How do I get keys for WCER?**

Keys are available in the Business Office during regular business hours (M–F, 7:45 to 12:00 and 1:00 to 4:30). Jeanne Schneider, Assistant Director, authorizes the distribution of keys based on the assignment of space. Please contact Jeanne for space assignments before coming to the Business Office for keys.

How do I reserve meeting rooms?

Contact the Business Office (263-4210) to reserve conference rooms on the 2nd and 13th floors of the Educational Sciences Bldg.; the Director's Office (263-4200) to reserve the 7th floor conference room; and Technical Services (263-4333) to reserve 3rd and 4th floor meeting rooms. Reservations for the 6th floor conference room are done via a calendar sign-up on the conference room (654) door. Room capacity, configuration, and AV capabilities can be viewed at: www.wcer.wisc.edu/resources/conf_rooms.php.

How do I get an office for myself and/or my staff?

Discuss anticipated needs for office space with Adam Gamoran, the WCER Director, when you meet to discuss bringing your research project to the center. Once you receive an award and you and/or your staff have been allocated office space, contact Jeanne Schneider, Assistant Director, at 265-4462 for office assignment.

What additional on-site services are available at WCER?

WCER has in-house copy and mail shops. Information on these services can be found on the WCER Web site at <http://copymail.wceruw.org/>.

How do my employees get parking assignments?

Contact the front desk in the WCER Business Office for parking application procedures. Otherwise, Transportation Services contacts everyone in the UW system who currently has a parking assignment in May, reminding them to resubmit their parking application for the next year.

How do I get a phone number?

Once you are assigned an office, Jeanne Schneider, Assistant Director, will inform the staff in the Business Office, which will trigger the assignment of a telephone number, as well as mail drops and appropriate directory listings.

How do I obtain supplies?

General office supplies are kept in the Business Office storeroom and may be accessed during normal business hours (M–F, 7:45 to 12:00 and 1:00 to 4:30). Additional supplies may be ordered through Joe Neumaier in the Business Office.

FINANCIAL SERVICES

Are expenditures paid automatically?

You must complete a payment request form and submit it to the Business Office. Even items that have been budgeted and approved require a payment request form to trigger the payment process.

How do I keep track of my project's finances?

The Business Office will provide regular reports for each of your projects, which will incorporate any expenses that may be either encumbered or paid. You can also obtain a login to the WISDM financial system to see detail on already paid items.

How do I get a fund and account number for my project?

Sandy Treptow in the Business Office works with Research and Sponsored Programs (RSP), which assigns fund and account numbers.

How do I pay invoices?

Discuss any invoices (consultants, airfare, conferences) with your administrative professional.

How do I get memberships and subscriptions paid?

Unless itemized in your budget, memberships and subscriptions may not be paid with federal funds. They may be paid with non-federal funds or budgeted as line items on federal grants.

How do I get reimbursed for purchases I made using my own credit card?

Discuss any reimbursements for purchases made using your own credit card with your administrative professional.

When my project ends, what happens to unspent funds?

Review your financial statements and inform the Business Office of any changes that need to be made a few months before the end date of your project. The cost accounting rules do not allow for spending funds just to obtain a zero balance; all funds must be spent in accordance with the funding agency regulations. If funds remain at the end of a project period and there are no appropriate charges that can be transferred to the account, the funds must be returned to the funding agency.

TRAVEL

How do I make airline and hotel reservations?

Discuss reservations with your administrative professional.

May I reimburse interviewees for their travel expenses?

Prior to the interview, discuss any interviewee reimbursements with your administrative professional. Academic staff applicants may be reimbursed, but the reimbursement must be approved by the School of Education (SoE) before the travel.

How do I get reimbursed for purchases I made using my own credit card?

Discuss any reimbursements for purchases made using your own credit card with your administrative professional.

How do I reserve a university vehicle?

Discuss reserving a university vehicle with your administrative professional.

HUMAN RESOURCES

Will I have an administrative assistant?

WCER has a large staff of administrative professionals. You may be assigned an administrative professional or we can recruit one for you.

Who can answer the questions I have about benefits?

We highly recommend that new employees attend Benefits 101 (www.ohrd.wisc.edu). Your home department or the expert staff at Employee Compensation and Benefits Services (49 Peterson Bldg., 5-2257, www.bussvc.wisc.edu/ecbs/) can answer benefits questions.

How do I hire people to work on my project?

Identify the tasks and budget for a position, then meet with Bonnie Griffin in the Business Office to develop a recruitment strategy. Do not make employment offers before talking with Bonnie. Many rules and regulations govern university employment and remuneration. For LTE and student appointments, including work study, meet with Mary Hegge in the Business Office.

How do I pay non-university contributors to my project?

Prior to the work, discuss any payment to non-university contributors (consultants, airfare, conferences) with your administrative professional who will then complete the Payment Determination Form and submit it to the Business Office. This form is posted on the Business Office Web site (www.wcer.wisc.edu/serviceunits/busofc.php).

Do new employees serve a probationary period?

Yes, employees serve a period of evaluation. This is the time to resolve performance deficiencies. During the evaluation period, the employee may be dismissed at the discretion of the supervisor, with the approval of the dean, without right of appeal. Be advised, performance improvement interventions and terminations are long and laborious processes once employees have passed probation. Limited-term, project-classified, and student hourly employees are at-will employees.

What recruitment process paperwork is my responsibility?

The hiring committee must provide Bonnie Griffin, in the Business Office, with information about all applicants who were interviewed for each recruitment. A position vacancy listing (PVL) chart with the names of all applicants for each recruitment will be provided to the hiring committee to aid in this process. The Business Office takes care of appointment and rejection letters.

May I reimburse interviewees for their travel expenses?

Prior to the interview, discuss interviewee reimbursements with your administrative professional. Academic staff applicants may be reimbursed, but reimbursement must be approved by the SoE beforehand.

What should I know about supervising represented employees?

Tasks, salaries, and appointment percentages for project assistants (PAs) are restricted and governed by the university and the union agreement. For classified employees, tasks, salaries, and disciplinary procedures are governed by the union agreement.

What is my responsibility for HR documents such as academic staff leave reports, PA leave reports, classified time sheets, and student hourly work hours reports?

Auditing regulations require principal investigators (PIs) or their designees to verify the accuracy of academic staff leave reports, PA leave reports, classified time sheets, and student hourly work hours reports.

Do I have to review my staff's performance?

Yes. Academic staff have an annual performance review (merit exercise) in early spring. Classified staff have an annual performance review in late spring. Academic performance planning is done in June. You will receive notice of all three. Forms and guidelines are available on the Business Office Web site (www.wcer.wisc.edu/serviceunits/busofc.php). PAs do not receive formal evaluations but should receive mentoring for the duration of their appointments.

How do I get salary increases for my employees?

Classified employee and PA salary increases are determined by the university and the unions. Academic staff salary increases are determined by the merit exercise and base rate adjustments (promotions, change of duties within title, equity, etc.). Information on academic staff salary increases is on the Business Office Web site (www.wcer.wisc.edu/serviceunits/busofc.php). Student hourly wage increases require a memo to Bonnie Griffin, Business Office, requesting and justifying the amount and indicating the effective date.

Can start dates (employment) be backdated?

No. To comply with the federal Immigration Reform and Control Act, new employees must complete an Employment Eligibility Verification (I-9) form before or on the first day of work. This document must be presented within 3 business days of the first day of work.

TECHNICAL SERVICES

How do I get access to the WCER project drives?

To gain access to WCER project drives, you must go to Technical Services and fill out a Network Activation Form. Specify which project drives you need access to.

I've lost an important document. Can I get access to a backup copy?

If your file was stored on the network (in a project drive or a network folder) for 24 hours or more, Technical Services can retrieve it from the backup system. Use the Tech Services support Web page (www.wcer.wisc.edu/staff/index.php) or send an email to support@wcer.wisc.edu. Provide the name, location, and date of the file. Please be aware that your local hard drive is not backed up and files lost from this area are not recoverable. Call 263-4333 for more information about using network drives.

How do I purchase a computer or other kinds of electronic equipment?

Contact Brian Ganje in Technical Services (263-4333 or baganje@wisc.edu) to discuss purchases for your project. Once a decision on equipment has been made, an Equipment Request Form (available at http://techserv.wceruw.org/Equipment_Request.pdf) needs to be completed and signed by you. Return the signed form to the Tech Services front desk. Small in-stock items usually arrive in a few days, delivered directly to your project; larger and/or more expensive items may take a few weeks to arrive. Upon delivery, Tech Services will notify your staff and assist with delivery and setup if desired.

How do I get a WCER network login?

First, you must acquire a UW NetID. You can do this via the DoIT Web site. (www.mynetid.wisc.edu/activate). Once you have a UW NetID, a WCER Network Activation Form (available in the Tech Services reception area) needs to be completed and signed. Tech Services staff will then set up your WCER network account and permissions.