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STEP ONE: REGISTRATION

- The carpool participant must fully fill out the **Carpool Registration Form**. This includes obtaining their Manager’s signature.
- We must take a copy of the participant’s unexpired license, registration, and insurance. The expiration date must be clearly visible on all copies. Expired insurance cards with the same insurance number are not acceptable as proof of insurance.
- The participant’s name and ID number are added to the Carpool Spreadsheet.
 - If the participant has completed all registration requirements, their name, and ID number are highlighted in green. The participant’s registration packet is initialed and dated by the HR employee who entered it into the spreadsheet. The packet is then filed with the other completed carpool registration packets.
 - If the participant has not completed all the registration requirements, then the whole row associated with that participant is highlighted in yellow. The far right column denotes what is still needed to completed the registration requirements, for example, an unexpired insurance card. The participant’s registration packet is filed with the uncompleted carpool registration packets. Once the participant completes their packet, the bullet point above is followed.

STEP TWO: TRACKING

- The **Carpool Tracking Template Spreadsheet** includes participant names, ID numbers, amount of incentive given each pay period, and any notes.
 - The spreadsheet should be sorted by last name alphabetically.
 - Once a participant has been terminated, their name and ID number are changed to red.
 - The spreadsheet should be set up so that the sum for each pay period is in a row at the bottom of the spreadsheet. The sum for each participant should be the second to last column on the right.
 - The dates for the pay period should be shown as a range of dates (for example 10/24-11/6).

STEP THREE: VERIFICATION SHEETS

- All carpool participants are required to fill out the **Carpool Verification Form** and turn it in to the designated location (Currently Employee Center/Uniform Room).
 - The participant is required to fill out with 100% accuracy.
 - The department number, manager's name and ID number can be filled out by the participant (if they know that information), or by the manager.
 - The participant needs to fill out the following information every day that they bring passengers:
 - Date of carpooling
 - Name, ID and department number of all passengers.
 - The manager then needs to sign and date.
- Once the verification sheet has been turned in, the Employee Center employee will verify:
 - Date and time.
 - Common problems: People will right the incorrect date, but the right day of the week or the date/time is difficult to read.
 - Names of all present in the car.
 - If the passenger names are incorrect, credit is not given for those names.
 - Must include all passenger ID #'s
- Please note, there are times an employee will not get credit for a certain date.
 - For example: Two different employees in the same "carpool" each claim they drove on the same day. I.e. John drove Bob and Bob drove John. Both forms will be voided in examples like this. Accuracy is key!
- The Employee Center Employee will then update the **Kirkwood Carpool Cash Tax Form Template**.

STEP FOUR: Direct Connect Case

- The Employee Center Employee will then open a Direct Connect Case in EpicEmployee>Learn More & Get Help>[Ask a Pay Question](#)
- The Employee will choose "Other" under "What Type of Question Do You Have?"
- The Employee will type in "Kirkwood Carpool Cash Tax Form" under "Short Description of Your Request"
- The Employee will then type "Here is the Kirkwood Carpool Cash Tax Form for pay period (first date of pay period) – (last day of pay period)" under "Please provide any additional information that will help us better understand your question"
- Lastly, the Employee will attach the current "Kirkwood Carpool Cash Tax Form" and click submit. *This must be done on the weekend the pay period closes to give Payroll time to add to the next Friday's check.*

KIRKWOOD CARPOOL CASH SOP

last updated 11/4/2021

FORMS

[Carpool Registration Form](#)

[Carpool Tracking Template Spreadsheet](#)

[Carpool Verification Form](#)

[Kirkwood Carpool Cash Tax Form Template](#)