

# Fiscal Volunteer Agreement Form

This form is to confirm the assignment of a Fiscal Volunteer for OSU Extension.

Background information for Fiscal Volunteers can be found on the Business Office Website:

<http://cfaesfinance.osu.edu/resources>

- **Unit Directors:** Fiscal Volunteers are assigned by Unit Directors and are allowed to do additional tasks that other volunteers are not.

- This agreement does not protect the unit in any way. By completing this form the Unit is accepting responsibility for any losses or necessary prosecution that may occur as a result of this arrangement.

- **Non Employees:** This agreement does not designate these individuals as employees and they will not be paid for services provided.

- The individuals are not eligible for University benefits including retirement, medical, dental and vision coverage, flexible spending accounts (FSA), life insurance, disability coverage, tuition assistance, vacation or sick leave, or worker's compensation.

**Listed below are a list of typical tasks for normal volunteers, fiscal volunteers and a list of tasks that are not allowable.**

Typical Volunteer Tasks	Tasks that are not allowable
Answer phones	Write or sign checks
Handle questions from visitors	Purchase items using the PCard or local check
File paperwork for non-sensitive data	Access University systems
Process out-going mailings	File paperwork containing restricted data
Answer incoming email for general office questions	Initiate Fiscal or HR transactions
Assist in preparing for training classes and setting up events	Sign documents on behalf of OSU
Call vendors to help organize expenses on events	
Help with managing registration forms and inputting data	
Help with writing memos	
Sign for packages	
Assist with eReports reconciliation	

## Allowable Fiscal Volunteer Tasks

Write receipts & records transactions for incoming money (walk-ins and mail)

Run the registration table or sell publications at a meeting where payments are accepted at the door

- After carefully reviewing the information above, complete the second page of this form to add, renew or remove a fiscal volunteer for your unit.

- If you have questions regarding this policy please contact the Business Office Business Manager before proceeding to page two.

<http://cfaesfinance.osu.edu/aboutus>



**THE OHIO STATE UNIVERSITY**

COLLEGE OF FOOD, AGRICULTURAL,  
AND ENVIRONMENTAL SCIENCES

Attention! Before completing this page, please review page one carefully.

### Fiscal Volunteer Information

Unit Name: \_\_\_\_\_

Name of Volunteer: \_\_\_\_\_

Active Dates: \_\_\_\_\_  
*(not to cross Calendar Years)* From \_\_\_\_\_ To \_\_\_\_\_

Volunteer Contact: \_\_\_\_\_  
*(Phone or Email)*

**Adding or Renewing a Fiscal Volunteer** - This status requires recertification on an annual basis. Complete this section at the beginning of each Calendar Year.

There have been no instances of concern in the past with this volunteer.  
By signing this form you are agreeing that you have read page one of this document and agree to abide by all University policies regarding handling of funds and all Ohio Ethics Laws.

Regional Director Approval: \_\_\_\_\_  
Only needed if this is the first time this volunteer has been designated as a fiscal volunteer.

Volunteer Initial & Date

Unit Director Initial & Date

**Removing a volunteer** - This section allows you to remove the Fiscal Volunteer designation from this volunteers record.

This volunteer will continue as a general volunteer, but no longer a fiscal volunteer

Effective Date: \_\_\_\_\_

This volunteer will no longer be an OSU Extension volunteer at this time

\_\_\_\_\_  
Unit Director Signature

\_\_\_\_\_  
Date

Return to the Business Office, [buxton.65@osu.edu](mailto:buxton.65@osu.edu)