

## **WHO'S WHO IN THE WORK-STUDY PROGRAM OFFICE/UNIT**

The Financial Aid Office (FAO) Work-Study Program Unit:

- A. Administers the:
  - 1. Federal Work-Study Program (FWSP); and
  - 2. President's Work-Study Program (PWSP)
- B. Located in Room 2101, Student Affairs and Administration Building (SAASB).
- A. Phone #: (805) 893-8923
- D. E-Mail: [wsp@sa.ucsb.edu](mailto:wsp@sa.ucsb.edu)

## **WORK-STUDY PROGRAMS AT UCSB**

The Work-Study Programs at UCSB include:

- A. The Federal Work-Study Program (FWSP) that supports US citizens and permanent residents; and
- B. The President's Work-Study Program (PWSP) that supports international students and scholars.

## **PURPOSE OF THE FEDERAL WORK-STUDY PROGRAM**

The purpose of the Federal Work-Study Program (WSP) is to stimulate and promote part-time employment opportunities for financial aid (student) recipients that:

- 1. To the maximum extent practicable:
  - a. Involves work experience related to the recipient's educational and/or career objectives; and
  - b. Involves the recipient in community service activities; and
- 2. Provides the recipient an earned wage to help defray educational expenses.

Unlike other forms of financial aid (e.g., grants, scholarships and/or loans), the WSP recipient must earn his/her Work-Study award. Every dollar earned in gross WSP wage represents one WSP award dollar received. Of that one dollar earned and received, the WSP employer pays just one-half while our appropriation funds pay the remaining half.

## FEDERAL WORK-STUDY RECIPIENT ELIGIBILITY

A student who wishes to participate in the Federal Work-Study Program must first be a financial aid recipient. The factors that affect recipient eligibility include:

A. UC's March 2nd priority filing date; and

NB: Students who apply for financial aid after this date may be ineligible for Work-Study consideration although they may receive other forms of financial aid.

B. UCSB's "packaging guidelines" for financial aid; and

NB: These guidelines define the recipient's "aid package" in terms of grant, scholarship, loan and/or Work-Study and may vary from year to year in accordance with Federal, State, UC and/or UCSB campus policy and/or regulation.

C. The recipient's assessed financial need, packaged aid and any subsequent revision thereto; and

NB: A recipient's packaged aid and assessed need must balance in so far as *aid* may not exceed *need*. Should aid exceed need, the recipient's packaged aid will be revised downward. Such a revision may affect the recipient's Work-Study award, which is a need-based form of financial assistance.

D. The recipient's satisfactory academic progress and/or Financial Aid suspension; and

NB: A recipient loses his/her Work-Study eligibility if/when placed on "financial aid suspension" for failing "to make satisfactory academic progress" (i.e., insufficient units completed toward the degree).

The WSP Unit staff will alert the employer if/when a recipient is placed on financial aid suspension. In such event, the employer must suspend or terminate the recipient's Work-Study funded employment unless the recipient's FAO Advisor rescinds the student's suspended status. The recipient's employment may continue on the employer's regular or "straight" funds (i.e., non-WS funds).

E. The recipient's UC Student Status as a registered UCSB graduate or undergraduate student; and

NB: Only regularly enrolled recipients may be employed on Work-Study. Limited Status and UC Extension students are not eligible for Work-Study consideration.

Should the Work-Study recipient withdraw or for any reason *lapse* registration status, the employer must terminate the recipient's employment on Work-Study. Employment may continue on the employer's regular or "straight" funds (i.e., non-Work-Study funds).

F. The recipient's enrolled unit status; and

NB: Undergraduate recipients must enroll in at least 6.00 units and the graduate recipient must enroll in at least 4.0 units while employed on Work-Study.

## **FEDERAL WORK-STUDY RECIPIENT ELIGIBILITY:**

G. The recipient's adherence to the Work-Study Award Utilization ("Use It or Lose It") Policy.

NB: This policy allows for more effective utilization of Work-Study funds and:

1. Requires the recipient to:
  - a. Obtain employment on Work-Study before Fall Quarter ends; and/or
  - b. Alert the Work-Study Office, in writing, if work on Work-Study will not begin before the end of Fall Quarter.
2. Releases expired (unused, unprotected) Work-Study funds for reallocation/redistribution to other (working) WSP recipients.

## WORK-STUDY EMPLOYER RESPONSIBILITIES

Employment of a UCSB Work-Study recipient, requires the Work-Study employer to:

- A. Directly supervise the services performed by each recipient; and
- B. Provide each recipient verbal and written orientation about and/or explanation of:
  - 1. Scheduled work hours and location of work site; and
  - 2. General working conditions, safety/emergency procedures, standards of conduct and dress; and
  - 3. Applicable departmental and/or University policies and procedures; and
  - 4. Job duties/responsibilities, including expected methods and priorities for performing same; and
  - 5. Appropriate basic, progressive and/or corrective training; and
  - 6. Avenues of appeal, review and due process within UC guidelines to promote “a positive working experience;” and
  - 7. Rest periods as permitted by UC regulation and State law, without denying payment; and
- NB: UC Staff Personnel Policy (310.6) applies to the recipient hired in the (non-academic) Student Asst. I-IV Series as a non-exempt, part-time employee. The Student Assistant may receive (be granted) one fifteen-minute rest period for each work period of three continuous hours or more not to exceed two rest periods per day.
- C. Provide each recipient a written job description and periodic oral and annual written evaluation; and
- D. Insure an environment free from all forms of harassment, exploitation and intimidation; and
- E. The maximum degree possible, to permit flexibility to accommodate the recipient’s work, class and examination schedules; and
- F. Not solicit, accept, or permit solicitation of any fee, commission, contribution, or gift as a condition for a student’s Work-Study employment; and
- G. Not permit garnishment of a recipient’s Work-Study wage and, in such event, contact the Director of Financial Aid immediately; and
- H. Insure no recipient is denied work or subjected to different treatment on the grounds of race (including racial harassment); color; religion; marital status; national origin; ancestry; sex (including sexual harassment); sexual orientation; physical or mental disability; medical condition (cancer-related) as defined in Section 12926 of the California Government Code; status as a Vietnam-era veteran or special disabled veteran; or, within the limits imposed by law or University regulations, because of age or citizenship; and
- I. Further agree to comply with the provisions of the Civil Rights Act of 1964 (Pub. L. 88-352; 78 Stat. 252), Title IX of the Educational Amendments of 1972 (Pub. L.92-318), and the Regulations of the Department of Education which implements those Acts; and
- J. Insure the recipient’s pay basis is (1) hourly or (2) for the graduate student recipient, a monthly, variable or fixed percent time and (3) never a stipend, a by agreement amount or without salary; and
- K. Insure the recipient is not concurrently paid as a UC faculty or casual or career staff employee; and

## WORK-STUDY EMPLOYER RESPONSIBILITIES:

- L. Establish an equitable rate of pay for the recipient that is not conditioned by Work-Study funding; and

- NB: Staff personnel policy requires the Student Assistant receive an hourly wage that:
1. Falls within the hourly range for each step/level of the Student Assistant Series; and  
REFERENCE: Personnel's memo of September 16, 1982:  
Classification and Compensation of Student Employees
  2. Is appropriate and reasonable for:
    - a. The tasks to be performed and level of responsibility involved; and
    - b. Skills needed to perform the job; and
    - c. Employee proficiency.

- NB: Academic personnel policy establishes the appropriate rates of pay for academic titles, e.g., Reader, Tutor, Associate, Teaching Assistant, Graduate Student Researcher, etc.

### CAUTION:

**Work-Study funding may not determine or in any other way affect a recipient's hourly rate, wage or salary.** To condition a recipient's wage on the basis of Work-Study funding:

1. Directly violates Federal Work-Study regulation; and
2. Provides the Work-Study Coordinator due cause to immediately terminate the employer's participation in Work-Study; and
3. Involves or is evidenced by such situations and/or comments as:
  - a. A higher initial hourly rate or base salary: an inflated or "ballooned" rate/salary; and/or  
Sample quote: "With Work-Study, we'll pay you \$10.00 an hour; without it you'll get \$6.75...same as everyone else."
  - b. A subsequent raise in pay rate that is dependent on WSP funding; and/or  
Sample quote: "Only Work-Studies get raises; that's what I was told. If I use my Work-Study, I'll get a raise."
  - c. Additional hours reported to payroll but not actually worked; fraudulent time keeping and payroll reporting practices.  
Sample quote: "He told me just to report twice the hours I really work. That way I get paid more. That's what Work-Study means."

## WORK-STUDY EMPLOYER RESPONSIBILITIES:

- M. Receive a valid Work-Study Referral from the recipient before beginning or prior to completing the employment process and observe any and all WSP related restrictions contained therein; and

CAUTION: A Referral may be stale-dated and the award canceled (expired).  
See also: WORK-STUDY REFERRAL, Item B, Pg. 20.

- N. Not permit the recipient to begin working on (i.e., not charge time worked to) Work-Study prior to the Referral Date shown on the recipient's Federal Work-Study Referral; and

NB: The recipient's BEGIN DATE on Work-Study may **not** precede the Referral Date as shown on the recipient's Federal Work-Study Referral.

- O. Make a photocopy of Referral, duly completed and signed, and return the Referral to the Work-Study Office; and

- P. Complete the employment process for each recipient hired or re-hired on Work-Study as governed by Federal, State, University and FAO regulation *before* allowing the recipient to begin work; and

NB: Each award period (i.e., the Academic Year and/or Summer) requires its own Work-Study Referral and distinct (separate) WSP Distribution Line. If there is no break-in-service, the employer may extend the recipient's Appointment Line. **The employer may not extend a prior period WSP Distribution Line.**

- Q. Immediately terminate Work-Study funded employment should the student:

1. Be placed on Financial Aid suspension; or
2. Withdraw from the University or for any other reason allow UC student registration to lapse; or
3. Drop to less than half-time status: undergraduate student must maintain 6 units and graduate students at least 4.00 unit during the Academic Year; and

- R. Prohibit, unless appropriate approval is obtained, the employment of a recipient who would:

1. Be in a supervisory relationship with a near relative,
2. Have the same immediate supervisor as a near relative, or
3. Have a close working relationship with a near relative; and

NB: For the purpose of this policy, a near relative is defined as a spouse, parent, child, or sibling and step-relatives and in-laws in those relationships.

REFERENCE: 1) Academic Personnel Manual, Section 520:  
The Employment of Near Relatives  
2) Staff Personnel Manual Sections 211.26, 211.28 and 211.28:  
Appointment Considerations

- S. Provide each recipient a (Work-Study) Time Sheet on which to record:

1. The date and hours worked in time sequence and
2. The recipient's signature and
3. The supervisor's signature affirming that:
  - a. The hours reported were actually worked and
  - b. The work was performed in a satisfactory manner as evidenced by the following, mandatory statement: ***I hereby certify that this is a true statement of hours worked and that the work was performed in a satisfactory manner;*** and

## WORK-STUDY EMPLOYER RESPONSIBILITIES:

T. Insure that all hours worked are paid as so prescribed by State and Federal law and UC policy; and

CAUTION: No employer may assign nor may any recipient accept as volunteer or without salary any hour or hours worked in excess of the recipient's Work-Study allocation. Every recipient must be paid for all hours worked regardless of funding source.

U. Charge only hours and/or percentage time *actually worked* to Work-Study funds; and

NB: For the recipient hired in the non-academic Student Assistant I-IV Series, the employer:

1. May report time worked in excess of forty (40) hours per work-week:
  - a. As overtime,
  - b. Paid at the premium rate of one and one-half times the recipient's hourly rate and
  - c. Paid on Work-Study (optional); but
2. **Must never charge time-based benefits (e.g., vacation, sick leave and holiday pay) to Work-Study (i.e., to/against the recipient's WSP Distribution Line).**

Reference: Personnel Services memo of March 13, 1990:  
Staff Students and Leave Accruals

V. Report payroll and/or prior payroll adjustment transactions involving Work-Study with or prior to the regular monthly payroll deadlines; and

CAUTION: The June Supplemental payroll (which runs in early July) will not qualify for Work-Study consideration.

W. Pay all employer costs associated with the recipient's gross Work-Study wage which include: the employer's Matching Share of payroll expense, WSP Administrative Surcharge and contributions toward Worker's Compensation, and as appropriate, Medicare and Unemployment Insurance; and

X. Pay, as straight-funded wage, all hours worked in excess of the recipient's WSP allocation; and

Y. Maintain auditable Work-Study recipient employment and payroll records for no less than the standard five-year period following separation; and

NB: Employers should follow the general UC guidelines with regard to auditable employment and payroll records including the following Work-Study participation records/documents:

1. Work-Study Job Description; and/or
2. Photocopy of the Job Request; and
3. WSP Referral, Revision and/or Redistribution of Work-Study Award forms; and
4. Work-Study Daily Time Sheets.

Such record maintenance supports the Federal regulation that employers be prepared to show that Work-Study student employees performed actual work and were actually paid for their endeavor.

## TYPES OF WORK-STUDY POSITIONS

- A. To the maximum extent practicable, Work-Study positions must:
1. Complement and reinforce a recipient's academic and career goals; and
  2. Serve the public interest; and
  3. Whenever practicable, involve the recipient in Community Service related:
    - a. Activities that involve: health care, child care, literacy training, education, welfare and social services, transportation, housing and neighborhood improvement, public safety, crime prevention and control, recreation, rural and community development; and
    - b. Work experience that reaches past the University community into the local or national community and provides "long-lasting, identifiable, and demonstrable benefit." For example, the America Reads Challenge places UCSB students in local area elementary schools to tutor selected (high-risk) children in literacy and reading skills.
- B. The Work-Study student employee *may not perform* work that is intended to or does in fact:
1. Displace, replace or supplant employed workers; or
  2. Impair existing contracts for services; or
  3. Fill jobs that are vacant because the employer's regular employees are on strike; or
  4. Involve any partisan or non-partisan political activity associated with a candidate or with a contending faction or group in an election for public party office; or
  5. Involve employment as a political aide of any elected official; or
  6. Involve employment for an elected official who is not responsible for the regular administration of Federal, State, or local government; or
  7. Involve any lobbying on the Federal or State level; or
  8. Include employment for US Department of Education; or
  9. Involve the construction, operation, or maintenance of any facility used or to be used for sectarian instruction or religious worship; or
  10. Involve religious/sectarian instruction and/or worship; or
  11. Depend upon a student's political support or party affiliation as a condition of employment.
- C. Employers wishing to hire a Work-Study recipient as a paid intern may do so as long as:
1. Work-Study is not a requirement for participation; and
  2. All student interns are "paid" regardless of the funding source; and
  3. The established pay basis is hourly, never by stipend or by agreement (amount).
- D. An internship or a practicum that is a requirement for the degree for which a student is not normally paid does not qualify under Work-Study regulations.
- E. At UCSB, the permissible on-campus Work-Study positions include those whose nature is:
1. Academic—applicable titles include: Teaching Assistant, Graduate Student Researcher, Tutor, Reader; and/or
  2. Non-academic (or "staff") but only within the Student Assistant I-IV Series.

REFERENCE: Personnel Office memo of September 16, 1982:  
Classification and Compensation of Student Employees

## TYPES OF PAY ON WORK-STUDY

- A. The employer may hire the WSP recipient on the following pay basis:
1. Hourly: For both the graduate and undergraduate recipient hired as a Reader, Tutor or Student Assistant; and/or
  2. Monthly: For the graduate recipient whose percent time may be:
    - a. Variable: When hired as a Graduate Student Researcher; and/or
    - b. Fixed: When hired as a TA, Associate and/or Graduate Student Researcher.
- B. Overtime pay (as set forth in Staff Personnel Policy 315 and in UCSB Policies & Procedures, P6138):
1. May be paid on Work-Study (i.e., charged against the recipient's WSP Distribution):
  2. For the recipient hired in the Student Assistant Series who has worked or is working in excess of forty hours in the work-week; and
  3. Must be paid at the premium overtime rate of one and one-half times the recipient's straight-time hourly rate.
- D. Federal regulation does not permit the use of Work-Study funds to pay the recipient:
1. A stipend: EX: \$300.00 for a two-month internship; or
  2. A "by agreement" amount: EX: \$25.00 per story, per game, et cetera; or
  3. While employed as a UC faculty member, casual and/or career employee.
- E. The employer must never charge time-based benefits—that is, holiday pay, sick and/or vacation leave hours—to Work-Study; i.e., to or against the recipient's WSP Distribution.

**CAUTION:** No employer may assign nor may any recipient accept as volunteer or without salary any hour or hours worked in excess of the recipient's Work-Study award/allocation. The recipient must be paid for all hours worked regardless of the funding source.

## TAXES APPLICABLE TO GROSS WORK-STUDY WAGE

Allowable deductions from a recipient's gross Work-Study wage include:

- A. California State and Federal Income Tax; and
- B. FICA-related contributions at:
1. 7.5% gross wage to UC's Defined Contribution Plan (DCP); and
  2. 1.45% gross wage to Medicare.

## EMPLOYER EXPENSE/COST

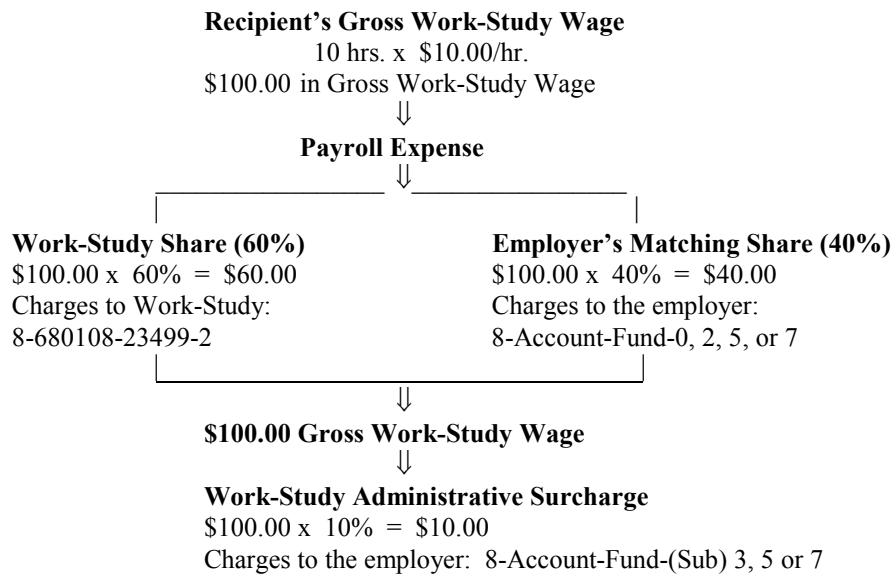
A. The Work-Study employer incurs the following expenses in support of a recipient's gross Work-Study wage:

1. Employer's Matching Share of payroll expense: Assessed at forty percent (40%) of a recipient's gross WSP wage; and

NB: The "Work-Study share" of payroll expense is assessed at sixty percent (60%) of the recipient's gross Work-Study wage. Work-Study funds pay the Work-Study share.

2. WSP Administrative Surcharge: Assessed at 10% of the recipient's gross WSP wage; and

FOR EXAMPLE:



3. Worker's Compensation; and
4. Medicare and Unemployment Insurance contributions for the recipient whose FICA status is non-exempt.

B. The employer assumes sole responsibility for the recipient's gross wage earned in excess of the Work-Study allocation.

**CAUTION:** No employer may assign nor may any recipient accept as volunteer or without salary any hour or hours worked in excess of the recipient's Work-Study award/allocation. Every recipient must be paid for all hours worked regardless of funding source.

**Exhibit A: Work-Study Job Request**

<b>WORK-STUDY JOB REQUEST</b>	
<b>Job Request ID:</b>	HIST123
<b>Department/Agency Name:</b>	History Department
<b>This position is relevant to the following career(s):</b>	
Clerical/Administration	
<b>Position Title/Classification:</b>	Student Assistant II
<b>Number of Employees Required:</b>	2
<b>Minimum Number of Hours Per Week:</b>	12
<b>Maximum Number of Hours Per Week:</b>	20
<b>Hours of Work:</b>	Day (8am-5pm)
<b>Hourly Pay Rate:</b>	Minimum Pay Rate: \$7 Maximum Pay Rate: \$8
<b>Periods Covered:</b>	Fall 2002, Winter 2003, Spring 2003
<b>Interviewer:</b>	U.S. Grant
<b>Interviewer's E-Mail Address:</b>	<a href="mailto:grant-us@history.ucsb.edu">grant-us@history.ucsb.edu</a>
<b>Interviewer's Phone Number</b>	893-1865
<b>Address 1:</b>	4321 HSSB
<b>Job Description:</b>	Mailings, photocopying, filing, answering phones, general office reception, occasional data entry and word processing.
<b>Qualifications:</b>	Knowledge of basic office procedures a must. Detail oriented, self-motivated, ability to work independently after initial training period. Knowledge of data entry and word processing with Windows 95 preferred but willing to train.
<b>Special Instructions</b>	Please call to set up interview.
<b>Request for Specific Student:</b>	
<b>Supervisor's Name:</b>	U. S. Grant
<b>Date Added:</b>	Friday, August 20, 2002
<b>Date Modified:</b>	Friday, August 20, 2002

## THE WORK-STUDY JOB REQUEST—OVERVIEW

- A. The Work-Study Job Request defines and advertises available employment opportunities for the Work-Study employer.
- B. All (active) Work-Study Job Requests are listed:
  - 1. Work-Study web site: **<http://www.finaid.ucsb.edu/workstudy>**
- C. Student access to the Work-Study web site is restricted to financial aid recipients who have a current year Federal Work-Study award in “accepted” status.
- D. FWSP recipients self-select the positions for which they wish to apply and will contact the “Interviewer” directly as indicated on the Job Request:
  - 1. In person
  - 2. By telephone
  - 3. By e-mail
- E. **Employers may submit their Work-Study Job Requests to the WSP Office electronically on the Work-Study web site; refer to the appropriate section listed below:**

<u>Section Title:</u>	<u>Page:</u>
<b>The Work-Study Website-Overview</b>	13
<b>To Access The Work-Study Web Site</b>	14
<b>To Add Additional Users</b>	15
<b>To Input A New Job Request</b>	16
<b>To Review Job Request(s)</b>	17
<b>To Remove A Job Request</b>	17
<b>To Re-post A Job Request</b>	17

## THE WORK-STUDY WEB SITE—OVERVIEW

- A. The Work-Study Web Site address is: **<http://www.finaid.ucsb.edu/workstudy>**
- B. Through the Web Site, the employer may:
1. Update his/her password.
  2. Update his/her User Profile.
  3. Add a New Job Request.
  4. Review the status of his/her Job Requests.
  5. Re-post an inactive (previously submitted) Job Request.
  6. Edit a currently posted Job Request.
  7. Remove a Job Request ("position filled").
  8. View the Federal Work-Study Employer's Handbook.
  9. View the Federal Work-Study Student Guide.
  10. View the Important Dates related to participation in the Work-Study Program.
- C. From the Web Site, the employer's PPS Contact Person will receive e-mail confirmation (WSP—Job Request Confirmation) for each/every web-site action that involves the employer's Job Request(s)—for instance, when the Job Request is:
1. Posted
  2. Removed
  3. Re-posted
- D. Detailed instructions for the employer to access the Web Site and/or post, edit, remove, and/or re-post Job Requests may be found at:

<u>Section Title:</u>	<u>Page:</u>
<b>To Access The Work-Study Web Site</b>	14
<b>To Add Additional Users</b>	15
<b>To Input A New Job Request</b>	16
<b>To Review Job Request(s)</b>	17
<b>To Remove A Job Request</b>	17
<b>To Re-post A Job Request</b>	17

## To Access The Work-Study Web Site:

NB: **Before you begin**, be sure that your web browser is set to:

1. Accept all cookies; and
2. Compare the document in cache to the document in the network once per session.

### **Log In:**

<b><u>Page</u></b>	<b><u>Click:</u></b>	<b><u>Action</u></b>
Home Page:	On <input type="button" value="EMPLOYERS"/> button.	Wait for "Employers Login".
Employers' Login:	On <input type="button" value="CONTINUE"/> button.	Note: Default is: "On-Campus Employer".
Employers' Login:	In "Dept/Agency" field.	Input your (4-letter) Dept. Code (i.e.: FINB)
	In "User Name" field	Input your Dept. Code plus 00 (zeros) NOTE: If you have changed your user name but can't remember it, call x8923.
	In "Password" field.	Default Password is Dept Code plus 00 (zeros). NOTE: If you have changed your password but can't remember it, call x8923.
	On <input type="button" value="LOG IN"/> button.	Wait for the "Employers' Menu."

### **Change Your Password:**

<b><u>Page</u></b>	<b><u>Click</u></b>	<b><u>Action</u></b>
Employers' Menu	on "Change Password" button	Change your password. You're new Password must be 6 to 10 characters long.
	On "Update" button	the following message will appear: "Your password has been updated. Click <a href="#">here</a> to return to the Main Menu."

### **Update Your User Profile:**

<b><u>Page</u></b>	<b><u>Click</u></b>	<b><u>Action</u></b>
Employer's Menu	On "Update User Profile" button	Verify that the listed information is correct. To edit information, click in the appropriate field and edit the incorrect information.
	On "Update" button	The following message will appear: "Your department information has been updated. Click <a href="#">here</a> to return to the Main Menu."

## To Input A New Job Request:

- A. In the **Employers Menu**, click on **ADD A NEW JOB** button to get to the “Add Job Request” screen.  
 B. Input appropriate information in all of the following fields, then click on **VERIFY** button.

NB: If you do not wish to complete a field, such as “interviewer’s phone”, enter “XX” in the field.  
**The computer will not allow you to update the job request if any of the fields (other than address 2) are blank.**

<u>Field:</u>	<u>Input:</u>	<u>Tips:</u>
<b>In Address 1 and 2 field:</b>	Change address as applicable	
<b>Career-Related Field:</b>	Click in the boxes of the applicable fields	Recipients have these fields as job search choices.
<b>Position Title/Classification:</b>	Position Title/Classification	Position Titles are preferable.
<b>Number Required:</b>	The number of recipients	If you are not sure, shoot higher than lower.
<b>Minimum # of hours per week:</b>	The minimum number of hours that each employee will work per week.	
<b>Maximum # of hours per week:</b>	The maximum number of hours that each employee will work per week.	
<b>Hours of Work:</b>	Click in the applicable boxes.	
<b>Minimum Hourly Pay Rate:</b>	Minimum Hourly Pay Rate	
<b>Maximum Hourly Pay Rate:</b>	Maximum Hourly Pay Rate	The maximum hourly rate may equal the minimum hourly rate.
<b>Periods Covered:</b>	Click in the applicable boxes	NB: If you hire recipients over the summer, it must be on non-Work-Study funds.
<b>Interviewer:</b>	Interviewer’s Name	
<b>Interviewer's E-Mail:</b>	Interviewer’s e-mail address**	This field is optional. This e-mail address will be posted on the web site. Recipients may arrange interview times and send electronic resumes via e-mail.
<b>Interviewer's Phone:</b>	Interviewer’s phone number**	
<b>Job Description:</b>	Job Description	
<b>Qualifications:</b>	Qualifications	
<b>Special Instructions:</b>		If you want a recipient to e-mail or call for an appointment, indicate that information here.
<b>Request For Specific Student:</b>	Indicate a specific student, not student type.	
<b>Supervisor's Name:</b>	Supervisor’s Name	

\*\* This information will be publicly accessible to all Work-Study recipients while the position is posted.

## To Review Job Request(S):

- A. Click on the **RE-POST OR EDIT A CURRENT JOB** button. Select the job you want to review.

## To Edit A Job Request:

- A. Click on **RE-POST OR EDIT A CURRENT JOB** button to access the **EDIT JOB REQUEST** screen.
- B. Then complete the following steps in the order listed below:
1. Click on **VIEW** button (to the left of the selected Job Request);
  2. Click on **EDIT** button (at the bottom of screen);
  5. Edit the Job Request;
  6. Click on **VERIFY UPDATE** button (at the bottom of screen);  
NB: To make any additional changes, click on **BACK** (browser) button.
  7. Click on **UPDATE** button to complete the transaction.
- C. The WSP Office will then re-review the Job Request and re-post it.

## To Remove A Job Request:

1. Click on **RE-POST OR EDIT A CURRENT JOB** button to access the **Edit Job Request** screen;
2. Click on **VIEW** button (to the left of the job listing);
3. Click on **POSITION FILLED** button.

The WSP Office will then remove the job request from the student's job board and from the job request binders in the WSP Office.

## To Re-post A Job Request:

- A. Complete the following steps, in the order listed:
1. Click on **RE-POST OR EDIT A CURRENT JOB** button to access the **Edit Job Request** screen;
  2. To select the desired job, click on **VIEW** button (to the left of the job listing);
  5. Click on **EDIT** button (at the bottom of the screen);
  6. Edit the Job Request;
  7. Click on **VERIFY UPDATE** button (at the bottom of the screen);  
NB: If additional changes are required, click on the **BACK** (browser) button.
  8. Click on **UPDATE** button to complete the transaction.
- B. The WSP Office staff will then review the Job Request and re-post it.

# Exhibit B: Federal Work-Study Referral

University of California, Santa Barbara  
Financial Aid office  
Work-Study Program Office

## FEDERAL WORK-STUDY PROGRAM

**On-Campus Referral**

**Academic Year 2002-2003**

Student's Name: **Clara Barton**  
Social Security Number: **123-45-6789**

Work-Study Award: \$ **1,700.00**

This award reflects:  
The maximum allowable gross Work-Study wage.  
The combined Departmental AND Work-Study Matching Shares.

The Work-Study Program Office (WSP) will formally notify employers of any revisions to this award in writing.

Authorized by: **Work-Study Program Staff** Referral Date: **October 19, 2002**

### INSTRUCTIONS TO THE EMPLOYER:

1. Review **2002-2003 Federal Work-Study Program (FWSP) Employer's Handbook** for all rights and responsibilities, policies and procedures regarding participation as a FWSP employer and the employment of this student of FWSP funds.

2. Update this student's 2002-2003 FWSP employment record in PPS. To do so properly, remember:

UC Student Status:

**Registered Student Status Code:** Must be: "3" (Undergraduate) or "4" (Graduate)

Appointment Line:

**Personnel Program Code:** Must be: "1" (Staff) or "A" (Academic)

**Appointment Type Code:** Must be: "4" (Casual/Restricted) or "5" (Academic)

FWSP Distribution Line:

**LOC/ACCOUNT/FUND/SUB:** Account number **may never begin with an "8"** (e.g., 8-~~806021~~-12345-2)

**LOC/ACCOUNT/FUND/SUB:** Fund number is **never 23497, 23499** (e.g., 8-680108-~~23499~~-2).

**BEGIN Date:** Begin Date **may never precede the Referral Date** shown above.

**END Date:** End Date is or precedes **June 13, 2003** (e.g., 06/13/03)

**DOS Code:** May only be **REG** (Regular); never BYA, STP, etc.

**WSP Code** WSP Code is "F."

3. Complete the section below. Include the Dept. Code and Dist. No. from the student's FWSP Dist. Line in PPS.

Account/Fund Number: _____	Dept. Code: _____
PPS's Preparer's Name: _____	Dist. No.: _____
E-Mail Address: _____	Phone Ext.: _____
Authorized Signature: _____	Date: _____

Photocopy this Referral; retain the copy with your auditable FWSP employment/payroll records.  
**Return this Referral to the Work-Study Program Office.**  
Failure to return this Referral may result in a late-set WSP Limit or loss of the allocation altogether.

## WORK-STUDY REFERRAL

The WSP Referral (form) authorizes the recipient's employment on Work-Study. As such, the Referral:

A. Documents (defines) the recipient's Work-Study by:

1. Program: As the Federal or President's Work-Study Program; and
2. Award period: As the Academic Year (AY) or Summer; and
3. Award: As the *maximum allowable gross wage* payable on Work-Study funds; and
4. Referral Date: As the date the recipient may begin employment on Federal Work-Study.

B. Defines the FWSP-related details required to complete the recipient's Appointment and Work-Study (WSP) Distribution Line(s) on PPS (see Exhibit B, Pg. 20).

C. Identifies, by REFERRAL DATE, the date the recipient may begin working on Work-Study.

**NB: The recipient's first day of Work-Study employment may not precede the Referral Date as completed on the Referral.**

**CAUTION:** A Referral may be *stale-dated* and the recipient's award already canceled if the Referral is dated before but presented after Fall Quarter ends (e.g., Dec. 14, 2001).

In such event, the employer should immediately contact the WSP Unit staff to confirm the recipient's current allocation status.

A Referral may not yet be stale-dated but the end of Fall Quarter is fast approaching.

In such event, the employer should immediately contact the WSP Office to:

- a) Alert the WSP staff of the recipient's (pending) employment status; and
- b) Request the WSP staff to "protect" the recipient's WSP award from reduction and/or cancellation.

D. Is distinct from the FINANCIAL AID AWARD LETTER which does not authorize employment.

E. Is exemplified in Exhibit B, Pg. 20.

F. Requires the employer to complete its lower portion, photocopy and to return it (the Referral) to the Work-Study Office, Dept. Code 3180 immediately for processing (see Exhibit C, Pg. 22). The split between departmental and work-study funds cannot be activated until the completed referral is received by Work-Study Office.

**CAUTION:** **The employer's failure to complete and return the Referral to the WSP Office may jeopardize the recipient's WSP award status.**

**Exhibit C: Federal Work-Study Referral, completed and signed by employer.**

University of California, Santa Barbara  
Financial Aid office  
Work-Study Program Office

**FEDERAL WORK-STUDY PROGRAM**

**On-Campus Referral**

**Academic Year 2002-2003**

Student's Name: **Clara Barton**  
Social Security Number: **123-45-6789**

Work-Study Award: \$ **1,700.00**

This award reflects:  
The maximum allowable gross Work-Study wage.  
The combined Departmental AND Work-Study Matching Shares.

The Work-Study Program Office (WSP) will formally notify employers of any revisions to this award in writing.

Authorized by: **Work-Study Program Staff** Referral Date: **October 19, 2002**

**INSTRUCTIONS TO THE EMPLOYER:**

1. Review **2002-2003 Federal Work-Study Program (FWSP) Employer's Handbook** for all rights and responsibilities, policies and procedures regarding participation as a FWSP employer and the employment of this student of FWSP funds.

2. Update this student's 2002-2003 FWSP employment record in PPS. To do so properly, remember:

UC Student Status:

**Registered Student Status Code:** Must be: "3" (Undergraduate) or "4" (Graduate)

Appointment Line:

**Personnel Program Code:** Must be: "1" (Staff) or "A" (Academic)

**Appointment Type Code:** Must be: "4" (Casual/Restricted) or "5" (Academic)

FWSP Distribution Line:

**LOC/ACCOUNT/FUND/SUB:** Account number **may never begin with an "8"** (e.g., 8-806021-12345-2)

**LOC/ACCOUNT/FUND/SUB:** Fund number is **never 23497, 23499** (e.g., 8-680108-23499-2).

**BEGIN Date:** Begin Date **may never precede the Referral Date** shown above.

**END Date:** End Date is or precedes **June 13, 2003** (e.g., 06/13/03)

**DOS Code:** May only be **REG** (Regular); never BYA, STP, etc.

**WSP Code** WSP Code is "F."

3. Complete the section below. Include the Dept. Code and Dist. No. from the student's FWSP Dist. Line in PPS.

Account/Fund Number: **123456-12345**

Dept. Code: **HIST**

PPS's Preparer's Name: **Suzanna Oh**

Dist. No.: **11**

E-Mail Address: **oh-s@history.ucsb.edu**

Phone Ext.: **1234**

Authorized Signature: **Suzanna Oh**

Date: **Oct. 21, 2002**

Photocopy this Referral; retain the copy with your auditable FWSP employment/payroll records.

**Return this Referral to the Work-Study Program Office.**

Failure to return this Referral may result in a late-set WSP Limit or loss of the award altogether.

## THE WORK-STUDY REFERRAL PROCESS

The Work-Study Referral process involves the recipient, the employer and the WSP Unit staff and requires:

A. The recipient to personally:

1. Obtain his/her Referral from the Work-Study Program Office; and
2. Present the Referral to the employer.

NB: Personal privacy restrictions do not permit Financial Aid and/or Work-Study staff to:

1. Release a Referral to anyone other than the recipient; and/or
2. Disclose the amount of an award to anyone other than the recipient.

B. The employer to:

1. Review the Referral Date and immediately confirm the recipient's award and status if the Referral is stale-dated; and
2. Complete the lower portion of the Referral (see Exhibit C, Pg. 22); and

NB: To complete the lower portion of the Referral, the employer must enter:

1. Account/Fund Number and Dept. Code
2. WSP Distribution Line Number (Dist. No)

NB: The WSP Unit staff will review (post-audit) this Distribution Line before updating the recipient's WSP Limit in PPS.

3. PPS Preparer's Name, E-Mail Address and Telephone Extension
4. Authorized Signature and Date

3. Photocopy the Referral and retain the copy; and
4. Return the Referral (duly completed and signed) to the WSP Office immediately; and

C. The WSP Unit staff to:

1. Prepare and issue the Referral to the recipient; and
2. Receive the Referral, completed and signed, from the employer; and
3. Post-audit the recipient's UC Registration status, Appointment and WSP Distribution lines in PPS; identify and alert the employer to missing/incorrect/inconsistent WSP related data; and
4. Update the recipient's WSP Limit in PPS only when the recipient's WSP data in PPS is complete and accurate.

**Note: The referral should be returned to the Work-Study Office (Dept. Code 3180) immediately. The split between departmental and work-study funds cannot be activated until the completed referral is received by the Work-Study Office.**

## THE WORK-STUDY AWARD PERIOD

- A. Each Work-Study award has a defined “award period” (i.e., the academic year or summer) that is noted on the recipient’s Work-Study Referral.
- B. The award period defines the portion of the fiscal year during which the recipient may earn the award.
  - 1. Federal Work-Study Program (FWSP):
    - a. FWSP is awarded for the academic year.
    - b. Unearned/unused award funds for these two award periods do not carry-over/carry-forward from one year to the next.
    - c. With the close of the award period, the recipient forfeits any unearned WSP award funds; no detrimental effect on recipient eligibility ensues from this action.
  - 2. President’s Work-Study Program (PWSP):
    - a. Observes the fiscal year (July 1, 2002-June 13, 2003) as the “award period.”
    - b. Unused/unearned award funds may carry-forward from the Summer to the Academic Year award periods.
    - c. Unused/unearned award funds do not carry-forward/carry-back from one fiscal year to another.
- C. WSP end dates of each award period vary annually in conjunction with UCSB’s Academic Calendar; always refer to the WSP Referral.

For example: Employment on Federal Work-Study may begin “ten days before classes begin.” For Fall Quarter, 2002, classes begin September 26, 2002. Employment on 2002-2003 FWSP may therefore begin on September 16, 2002 if—and only if—the student’s date of Referral (Referral Date) is September 16, 2002.

## THE WORK-STUDY PROGRAM (WSP) INDICATOR CODE

The recipient's assigned Work-Study Program (WSP) Indicator Code:

- A. Is a single letter code (e.g., F, P, M, etc.); and
- B. Distinguishes the recipient's:
  - 1. Actual Work-Study Program be that Federal or President's Work-Study; and
  - 2. WSP Award Period (e.g., Summer or Academic Year)
  - 3. Type of employer (e.g., On-Campus); and
  - 4. Type of work-experience (e.g., WSP/General or WSP/Community Service); and
- C. Is shown on the recipient's WSP Referral (see Exhibit C, Pg. 22); and
- D. Completes the WSP field of the recipient's (Work-Study) Distribution Line(s) in PPS—this Distribution becomes the Work-Study or “WSP Distribution;” and
- E. Works in tandem with the recipient's WSP Limit to:
  - 1. Assess and charge:
    - a. Payroll expense proportionately at:
      - 1) 40% gross wage As the employer's Matching Share on Sub 0/2, 5 or 7; and
      - 2) 60% gross wage As the Work-Study Share on Sub 2; and
    - NB: The employer may confirm this split on the IPER Screen in PPS and/or the departmental Distribution of Payroll Expense ledgers (the PPP's).
    - b. The Work-Study Administrative Surcharge Fee at 10% gross WSP wage earned to the employer's Sub 3, 5 or 7; and
    - NB: The employer may review this expense:
      - a) In summary on the Departmental GLO 60 ledgers (Object Code 7295) (see Pg. 46, Item E (Sample GLO60 ledger); and/or
      - b) In detail on the Work-Study Surcharge (detail) ledgers (see Pg. 46, Item F (Sample Surcharge ledger).
  - 2. Record the recipient's gross wage on the PPS IFNW Screen as FYTD WSP Gross, see Exhibit H, Pg. 34.

**Exhibit D: Federal Work-Study Award Revision/Redistribution Notification**

*Financial Aid Office/Work-Study Program Office  
University of California, Santa Barbara*

**Federal Work-Study Program  
Award Revision/Redistribution Notification**

Academic Year: **2002-2003**

TO: Employing Department: **History Department**  
Attention: **Suzanna Oh**

RE: Student's Name: **Clara Barton**  
Social Security Number: **123-45-6789**

We have revised and/or redistributed this student's Federal Work-Study award.  
The award amount committed to your department for this academic year is:

**\$ 1,500.00**

This revision is effective immediately.

We have also revised his/her WSP limit for your department. Please be aware that earnings in excess of this revised award become your department's sole responsibility at one-hundred percent (100%) cost.

If you have any questions/concerns regarding this revision, please immediately contact the Work-Study Program staff at: Ext. 8923.

Issued by: ***Work-Study Program Staff***

Date: **October 31, 2002**

**FOR WORK-STUDY OFFICE USE ONLY:**

- Revised WSP Limit in PPS.**
- Revised Limit on Employment Line in Wave**
- Mailed to On-Campus Department.**

## THE WORK-STUDY AWARD

The recipient's Work-Study award:

- A. Represents the *maximum allowable gross Work-Study wage* (s)he may earn on Work-Study; each dollar earned in gross FWSP wage represents one FWSP award dollar received; and
- B. Appears on the WSP Referral and Revision forms and as the recipient's WSP LIMIT on the student's IFNW Screen in the Personnel/Payroll System (PPS); and
- C. Never represents payroll expense or a "share" of payroll expense; and

CAUTION: The employer must never confuse the dollar value (amount) of an award with a share (portion or percent) of payroll expense. The distinction is as follows:

- 1. **AWARD:** Represents maximum allowable gross wage on Work-Study -- or -- the maximum allowable gross Work-Study wage.

EX: Prairie Dogg's award is \$1300; he may earn \$1300.00 gross Work-Study wage.

- 2. **GROSS (WORK-STUDY) WAGE:** Represents time worked multiplied by rate of pay.

EX: Prairie Dogg worked 10 hours at \$10.00/hour. He earned \$100.00 in gross WSP wage. He now has \$1200.00 remaining in his WSP award.

- 3. **PAYROLL EXPENSE:** Represents payroll cost incurred for gross wage paid:

a. Work-Study splits payroll expense *proportionately*:

- 1) At 40% gross WSP wage as the employer's Matching Share; and
- 2) At 60% gross WSP wage as the Work-Study share.

b. Gross straight-funded wage does not split; the employer pays 100 % payroll expense.

- D. Applies only to its award period/award year and does not carry forward to a new or subsequent period/award year; and

EXCEPTION: Unlike Federal Work-Study, President's Work-Study awards may span the entire *fiscal* year and carry forward from the Summer award period for use during the Academic Year. They do not carry forward from one (fiscal) year to the next.

- E. Will expire (be reduced to zero) should the recipient fail to:

- 1. Obtain employment on Work-Study before Fall Quarter ends (i.e., 12-16-2002); or
- 2. Submit formal notification to the Work-Study Office (e.g., an employer's "Intent to Hire" form, or other written documentation) that his/her employment on Work-Study will begin after Fall Quarter ends (e.g., in Winter or Spring Quarter).

## THE WORK-STUDY AWARD

F. May be revised by the FAO Advisor or Analyst in response to a change in the recipient's assessed financial need or aid; and

NB: A Work-Study revision increases or decreases the size (dollar value) of the award. This revision process requires the FAO Adviser/Analyst to:

1. Contact the recipient's employer to:
    - a. Ascertain the recipient's *Work-Study earnings-to-date* which include:
      - 1) PAID: Gross WSP earnings already paid; and/or
      - 2) REPORTED: Gross WSP earnings due but not yet paid for time recently reported; and/or
      - 3) CURRENT: Gross WSP earnings for time recorded on the recipient's current and/or outstanding (Work-Study) Time Sheet(s); and
- CAUTION: The employer must not confuse gross Work-Study wage with a share of payroll expense; the employer must report gross wage, not a share of payroll expense.**
- b. Advise the employer of recipient's (revised) award status; and
2. Alert the WSP Unit staff who will then:
  - a. Adjust (update) the recipient's WSP Limit to reflect the new award amount; and
  - b. Issue to the employer as formal, written documentation of the revised award a Federal Work-Study Award Revision/Redistribution Notification (see Exhibit D, Pg. 26).

G. May be shared by more than one employer during the course of the award period which:

1. Allows the recipient to hold multiple Work-Study positions concurrently or in succession; and
2. Requires the recipient to assign a portion of the entire award to each employer, which is then:
  - a. Referred to as the (employer's) Amount Committed; and

NB: The employer must complete AMOUNT EARNED to record the recipient's gross Work-Study earnings-to-date whether *paid, reported, current, and/or as otherwise committed* as noted above (Section F. 1. a.). In so doing, the employer assumes sole responsibility for wages earned in excess of this amount.

- b. Is first recorded on the recipient's Redistribution of Federal Work-Study Award Worksheet as exemplified in Exhibit E, Pg. 28;
- c. Is formally reported to the prior and/or concurrent employer(s), in writing, on the Federal Work-Study Award Revision/Redistribution Notification (see Exhibit D, Pg. 26).

**Exhibit E: Federal Work-Study Referral Completed and Signed by Employer**

University of California, Santa Barbara  
Financial Aid office  
Work-Study Program Office

**FEDERAL WORK-STUDY PROGRAM**

**On-Campus Referral**

**Academic Year 2002-2003**

Student's Name: **Clara Barton**  
Social Security Number: **123-45-6789**

Work-Study Award: \$ **1,700.00**

This award reflects:  
The maximum allowable gross Work-Study wage.  
The combined Departmental AND Work-Study Matching Shares.

The Work-Study Program Office (WSP) will formally notify employers of any revisions to this award in writing.

Authorized by: **Work-Study Program Staff** Referral Date: **October 19, 2002**

**INSTRUCTIONS TO THE EMPLOYER:**

1. Review **2002-2003 Federal Work-Study Program (FWSP) Employer's Handbook** for all rights and responsibilities, policies and procedures regarding participation as a FWSP employer and the employment of this student of FWSP funds.

2. Update this student's 2002-2003 FWSP employment record in PPS. To do so properly, remember:

UC Student Status:

**Registered Student Status Code:** Must be: "3" (Undergraduate) or "4" (Graduate)

Appointment Line:

**Personnel Program Code:** Must be: "1" (Staff) or "A" (Academic)

**Appointment Type Code:** Must be: "4" (Casual/Restricted) or "5" (Academic)

FWSP Distribution Line:

**LOC/ACCOUNT/FUND/SUB:** Account number **may never begin with an "8"** (e.g., 8-806021-12345-2)

**LOC/ACCOUNT/FUND/SUB:** Fund number is **never 23497, 23499** (e.g., 8-680108-23499-2).

**BEGIN Date:** Begin Date **may never precede the Referral Date** shown above.

**END Date:** End Date is or precedes **June 13, 2003** (e.g., 06/13/03)

**DOS Code:** May only be **REG** (Regular); never BYA, STP, etc.

**WSP Code** WSP Code is "F."

3. Complete the section below. Include the Dept. Code and Dist. No. from the student's FWSP Dist. Line in PPS.

Account/Fund Number: **123456-12345**

Dept. Code: **HIST**

PPS's Preparer's Name: **Suzanna Oh**

Dist. No.: **11**

E-Mail Address: **oh-s@history.ucsb.edu**

Phone Ext.: **1234**

Authorized Signature: **Suzanna Oh**

Date: **Oct. 21, 2002**

Photocopy this Referral; retain the copy with your auditable FWSP employment/payroll records.

**Return this Referral to the Work-Study Program Office.**

Failure to return this Referral may result in a late-set WSP Limit or loss of the award altogether.

## THE WSP RECIPIENT'S PERSONNEL RECORD IN PPS

Completing the WSP recipient's personnel record in PPS :

- A. Does not, in general, differ in policy or procedure from any other UCSB student employee; but
- B. Does require refinement relative to the WSP restrictions/conditions defined on the recipient's Work-Study Referral.

For Example: The employer must enter the recipient's WSP Indicator Code in the WSP field of the Distribution Line. This Distribution then becomes the "WSP Distribution."

See: Exhibit F, Pg. 30 Federal Work-Study Referral  
Exhibit G, Pg. 32 EAPP Screen

**NB: To continue to pay a recipient after the entire WSP award has been earned and the WSP Limit has "closed," the employer may simply continue to report time against the WSP Distribution. There is no need to add a second, non-WSP Distribution solely for this purpose. A "closed" WSP Limit allows a recipient's time to charge as straight-funded wage.**

### CAUTION:

In completing the Appointment and Distribution Lines, the employer must take care to:

1. **Never** extend the WSP Distribution Line from a previous award period; and

NB: For the continuing recipient who has no break-in-service, the employer may extend the end date of the Appointment Line to encompass the new award period. However, the employer must add/create a new WSP Distribution Line with the begin/end dates specific to the new award period and the recipient's new Referral Date.

2. Always begin employment on Work-Study for monthly-rated, fixed percent time employees (e.g., TAs, Associates, GSRs) as of the first day of the first whole calendar month on or following the student's Date of Referral (e.g., 10/01/XX for a Referral dated 10/01/XX, but 11/01/XX for a Referral dated between 10/02/XX and 10/31/XX); and
3. **Never** hire a recipient on a provisional account number in the "800000" account number series; and

EX: 8-876543-01234-2.

NB: In such event, contact the Work-Study Office for assistance in establishing a secondary account/fund number that is valid for Work-Study employment.

4. **Never** enter a Work-Study fund number (e.g., 23497, 23499, 18025, 18026) to complete the recipient's LOC/ACCOUNT/FUND/SUB.
5. The employer may add a second non-workstudy distribution if/when time based benefits such as vacation and sick leave are to be paid.

**Exhibit F: An EAPP Screen (abbreviated)**

NB: Dist. 11 carries the WSP Code “F.” As such, it becomes the “WSP Distribution” (or “Work-Study Distribution”).

NB: Student is employed at 50% time and will earn vacation, sick leave, and holiday pay. Dist. 12 added in order to pay him for these time-based benefits—they may not be charged to Work-Study.

PPEAPP0		SBT EDB Entry/Update Appointments/Distributions									
ID: 987654321	Name: DAVIS, JEFF					SSN: 123-45-6789					
Appt <b>10</b>	Actions	Pgm <b>1</b>	Typ <b>4</b>	Bas	Pd Ovr	Appt Begin <b>091602</b>	Appt End <b>061303</b>	Dur	Dept <b>FINA</b>		
Title <b>4921</b>	<b>Assistant II</b>			Grade	%Full	F/V <b>Y</b>	Ann/Hr Rate <b>7.0000</b>	RT <b>H</b>	Sch <b>MO</b>	Time <b>Z</b>	Lv <b>F</b>
Dist <b>11</b>	Actions	L <b>8</b>	Acct <b>111111</b>	CC Fund <b>22222</b>	PC	S <b>2</b>	<b>Financial Aid</b>		FTE	Dis % <b>0.25</b>	
	Pay Begin <b>091602</b>	Pay End <b>061303</b>	Step	O/A	Rate/Amount <b>7.0000</b>	DOS <b>REG</b>	PRQ	DUC	WSP <b>F</b>		
Next Func: _____ ID: _____ Name: _____ SSN: _____											
=== => _____											
F: 1-Help	3-PrevMenu			4-Print			5-Update				
F:	9-Jump						12-Exit				

## THE WSP PERSONNEL RECORD IN PPS

C. With the PPS update complete, the employer should immediately:

1. Complete and sign the lower portion of the Referral;
2. Photocopy it and retain the copy for their own office records; and
3. Return the Referral to the WSP Office for WSP Limit processing.

D. Upon receipt of the recipient's Referral copy, the WSP Unit staff will:

1. Post-audit the student's Appointment/Distribution record in PPS to confirm proper completion relative to Work-Study regulation; and
2. Alert the employer to any data that is inaccurate and/or incomplete; and

**CAUTION:**        **This correction/confirmation process may delay the update of the recipient's WSP Limit in PPS. The delay does not impact the system's ability to pay the student (i.e., cut/issue a paycheck).**

**However, until/unless the recipient's WSP Limit is set (updated), the recipient's payroll will charge as straight-funded rather than as Work-Study wage. That is, 100% payroll expense will charge to the employer; the employer will not see the characteristic Work-Study percentage split at 60/40.**

**We encourage the employer to report payroll on-time and without regard to Limit status. This strategy allows the student to receive his/her paycheck on time. The employer may adjust payroll activity from straight-funded to Work-Study wage at a later date when the recipient's WSP Limit is actually set (updated), open and active.**

Consult:    Late Pay/Reduction In Pay Time Reporting (EDLR) (Pg. 43) for the LX/RX transactions required to make this prior payroll adjustment.

3. Update the recipient's WSP Limit in PPS when/if all such data is accurate and complete, see Exhibit H: IFNW Screen, Pg. 34.

**Exhibit G: An IFNW Screen (abbreviated)**

NB: Student has redistributed her Work-Study award of \$1500.00: \$1,000.00 to the History Department and \$300.00 to Biology; \$200.00 remains “undefined.”

PPIFNW		SB EDB Inquiry Work Study					
ID: <b>560672049</b>		Name: <b>BARTON, CLARA</b>			SSN: <b>123-45-6789</b>		
Hm Dept: <b>HIST HISTORY</b>		Emplmt Status: <b>A</b>		Pri Pay: <b>MA</b>			
<u>FY</u>	<u>WSP</u>	<u>DEPT</u>	<u>---- Current ----</u>		<u>---- Prior ----</u>		<u>FYTD WSP</u>
			<u>Limit</u>	<u>As Of</u>	<u>Limit</u>	<u>As Of</u>	<u>Gross</u>
<b>2002</b>	<b>F</b>	<b>HIST</b>	<b>01000</b>	<b>12/07/02</b>	<b>01500</b>	<b>09/21/01</b>	<b>823.50</b>
<b>2002</b>	<b>F</b>	<b>BIOL</b>	<b>0300</b>	<b>12/07/02</b>			

## THE WORK-STUDY LIMIT PROGRAM

- A. The WSP Limit Program is a collateral payroll program. It works in tandem with the WSP Indicator Code to identify and to charge the recipient's payroll as gross Work-Study wage. To do so, the recipient's Limit must be active and open.
1. A Limit is *active* only for the duration of the fiscal year.
  2. A Limit is *open* only when it has available, remaining award funds.
  3. A Limit "closes" when earnings exceed the Limit (award) or with the close of the fiscal year.
  4. An active, open Limit will charge (Work-Study) payroll not as gross Work-Study wage but as gross straight-funded wage when the recipient's:
    - a. EIN/SSN is incorrect/inconsistent; and/or
    - b. WSP Indicator Code is incorrect/inconsistent; and/or
    - c. UC Student Status Code in PPS is not: (1) Code 3 for the Undergraduate or  
(2) Code 4 for the Graduate.
- B. The Limit Program does not interfere with the system's ability to pay, that is, to produce or to issue a paycheck.
- NB: This feature allows the employer to continue to charge time to a WSP Distribution Line after the Limit has closed. Because a "closed" Limit will charge 100% payroll expense to the employer, the employer need not create a separate Distribution Line simply to continue to pay the student employee on straight-funded (non-Work-Study) wage.
- C. Only the WSP Unit staff may update/set a WSP Limit for the recipient and will do so as soon as they:
1. Receive the Referral, duly completed and signed by the employer; and
  2. Confirm the proper completion of the Appointment and WSP Distribution Lines in PPS.
- D. The recipient's Limit is recorded and may be viewed on IFNW Screen in PPS
1. The IFNW Screen defines the recipient's Limit in terms of:
    - a. **FY:** Fiscal Year
    - b. **WSP:** Work-Study Program Indicator Code
    - c. **DEPT:** Employer's Department or Mail Code
    - d. **CURRENT LIMIT:** Award or portion thereof that is assigned to the employer
    - e. **PRIOR LIMIT:** Award or portion thereof that was previously assigned to the employer
    - f. **AS OF:** Date the Limit was updated and/or revised
    - g. **FYTD WSP GROSS:** Gross Work-Study wages paid-to-date
  2. Exhibit H, Pg. 34, displays a sample of the IFNW Screen in PPS with an established WSP Limit.

**Exhibit H: Work-Study Time Sheet**

**History Department  
Work-Study Time Card**

Employee Name: **Jeff Davis**

Payroll Period: **Oct 11 – Nov. 10, 2002**

Supervisor: **US Grant**

WSP Hours Remaining: **214.25**

DATE	TIME IN	TIME OUT	TOTAL HOURS	DATE	TIME IN	TIME OUT	TOTAL HOURS
<b>SEPT</b>	<b>1:00</b>	<b>3:00</b>	<b>2.0</b>	<b>OCT</b>			
16				1			
17	<b>1:00</b>	<b>3:00</b>	<b>2.0</b>	2			
18				3			
19				4			
20				5			
21				6			
22				7			
23				8			
24				9			
25				10			
26				11			
27				12			
28				13			
29				14			
30				15			

Actual Hours Worked: \_\_\_\_\_ at \$ \_\_\_\_\_ = \$ \_\_\_\_\_ (WSP)

Holiday Hours Paid: \_\_\_\_\_ at \$ \_\_\_\_\_ = \$ \_\_\_\_\_ (GA)

Sick Hours Taken: \_\_\_\_\_ at \$ \_\_\_\_\_ = \$ \_\_\_\_\_ (GA)

Sick Hours Earned: \_\_\_\_\_ Remain: \_\_\_\_\_

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*I hereby certify that this report is a true statement of hours worked and that the work was performed in a satisfactory manner.*

Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## DAILY TIME KEEPING

- A. Federal Work-Study regulation requires daily time keeping for the recipient whose pay basis is hourly and/or a variable time.
- B. Coupled with “good accounting practice,” this regulation dictates that the recipient’s (daily) Work-Study Time Sheet includes or identifies the following information in blue or black ink:
1. The employer’s departmental/unit/program name; and
  2. The employee’s name; and
  3. The begin and end dates of the payroll period or cycle; and
  4. The calendar date(s) work was performed; and
  5. Time actually worked as “time in” and “time out;” and
  6. Fractions of hours rounded to the nearest quarter-hour; and
  7. The employee’s rate of pay; and
  8. Total hours or summary percentage time worked for the pay period; and
  9. Total hours sick or vacation leave taken; and
  10. Gross pay due; and
  11. Employee’s signature, so identified; and
  12. Supervisor’s certification statement and signature, so identified; and
- NB: The supervisor’s certification statement is as follows:
- I hereby certify that this is a true statement of hours worked  
and that the work was performed in a satisfactory manner.**
- CAUTION: A supervisor signs the time sheet after the employee has signed. Supervisor must ensure that advance payment of hours or estimates does not occur.
13. Each page of a multiple page Time Sheet as belonging to a complete set, e.g., “Page 2 of 3.”
- C. The employer must maintain original Work-Study Time Sheets with their payroll and personnel records for an auditable five-year period following the employee’s date of termination or separation.

**CAUTION:** *Fraudulent reporting of time on Work-Study funds can be cause for cancellation of a student's financial aid and can lead to a \$10,000 fine, a prison sentence, or both as per federal regulation.*

## WORK-STUDY ALLOCATION TRACKING (UTILIZATION)

We encourage employers to maintain accurate records of any action on the recipient's WSP award. This practice will permit the employer to determine allowable work hours and to forecast when a recipient's Work-Study employment will or must end. To that effort, the employer should:

- A. Maintain a utilization roster that reflects/includes the recipient's:
  - 1. Current award (i.e., initial award and/or as revised);
  - 2. Current rate of pay;
  - 3. Gross Work-Study wage earned;
  - 4. Remaining award funds; and
- B. Calculate allowable work hours given the recipient's *remaining* Work-Study award:
  - 1. With the close of each pay cycle; and/or
  - 2. If the award changes (i.e., is revised, increased or decreased); and/or
  - 3. If the recipient's rate of pay changes (e.g., is range adjusted); and/or
  - 4. If the recipient receives overtime pay charged to Work-Study funds; and
- C. Confirm the recipient's award and gross wage activity on his/her IFNW Screen in PPS; and
- D. Immediately clarify discrepancies with the WSP Unit staff by phone at **x8923**, or by email at **wsp@sa.ucsb.edu**.

CAUTION: Although we also encourage recipient's to maintain accurate account of their WSP award, this responsibility ultimately resides with the employer.

## WORK-STUDY PAYROLL TRANSACTIONS IN PPS

Work-Study payroll reporting and prior payroll adjustment procedures do not, in general, differ from UCSB's student employee reporting procedures but they do require that the:

### A. Recipient's:

1. UC Student Status (check the IGEN Screen) be:
  - a. Code 3: Registered UC undergraduate student; or
  - b. Code 4: Registered UC graduate student; and
2. WSP Limit to be open and active (check the IFNW Screen); and  
  
NB: A WSP Limit is open and active when it has remaining (available) WSP award funds for the award period and fiscal year in question; when the WSP and DEPT Codes match those on the recipient's WSP Distribution (check the IAPP Screen).
3. WSP Distribution be current, accurate and complete (check the IAPP Screen).

### B. Employer:

1. Report and/or adjust prior payroll activity involving Work-Study:
  - a. For *actual (whole) time worked* in HOURS or in PERCENT TIME and never as a share, a portion or a percentage thereof; and  
  
NB: The recipient's WSP Indicator Code and WSP Limit will work in tandem to debit or credit payroll expense proportionately between the employer's and FWSP funds.
  - b. On or after the recipient's Referral Date,
  - c. Within the same award period and fiscal year in which it was earned; and
  - d. On or against the recipient's WSP Distribution; and
  - e. With or prior to the *regular* monthly and/or *regular* hourly June payroll deadlines and not the June Supplemental.

**CAUTION: The June Supplemental payroll runs in early July after WSP funds have closed and therefore occurs too late for WSP consideration.**

2. Retrieve (r) the WSP Distribution for late pay and/or prior payroll adjustments.
3. Never report on or against the WSP Distribution:
  - a. Time as a stipend and/or a by agreement amount; and/or
  - b. Holiday pay, sick and/or vacation leave hours.

## WORK-STUDY PAYROLL TRANSACTIONS IN PPS

4. Confirm WSP payroll and/or adjustment(s) passed correctly by:
  - a. Checking for the characteristic WSP percentage split on the:
    - 1) Departmental Payroll Expense Distribution ledgers (the PPP's); and/or
    - 2) Recipient's IERN Screen in PPS; and/or
  - b. Reviewing the gross WSP wage record under FYTD WSP Gross on the student's IFNW Screen.
5. Immediately attend to incomplete and/or inaccurate adjustments *because he/she (the employer) forfeits claim to Work-Study consideration (credit) with the end of the regular June hourly payroll and/or the recipient's registered student status.*

CAUTION: The June Supplemental payroll runs in early July after WSP funds have closed for the current year and may, therefore, occur too late for WSP consideration.

CAUTION: With the cessation of registered student status, a drop in enrolled units below half-time and/or the close of the fiscal year, employers forfeit claim to Work-Study consideration. The employer should take care to submit adjustments in a timely fashion, confirm they actually occurred (were processed) and immediately attend to an incomplete and/or inaccurate adjustment.

### SPECIAL NOTE TO EMPLOYER:

Please contact in Accounting's Payroll Division if you have non-Work-Study related payroll questions.

## On-Time Payroll Reporting (IDTC):

On-Time payroll is reported on the Time Collection Selection Criteria (IDTC) Screen. The IDTC Screen replaces the former “pre-printed payroll time sheets”. Note: We advise inputting payroll in PPS as soon as possible. As you attempt to input payroll, you will discover any errors in your employee's PPS records.

### Directions:

<u>Menu/Screen:</u>	<u>In this Field:</u>	<u>Input:</u>
1. <b>PPS Main Menu</b>  ➔ <b>Press Enter</b>	Next Func:	IDTC
2. <b>IDTC Screen</b>  ➔ <b>Press Enter</b>	Pay End:  Pay Cycle:  Produce: Roster  Selection Criteria: Full Accounting Unit:	The Current Pay Period End Date  MA (Monthly Arrears) or MO (Monthly)  "S"  <ul style="list-style-type: none"> <li>• Location</li> <li>• Account Number</li> <li>• (Tab to 4th Section)</li> <li>• Fund Number</li> <li>• (Tab to 6th Section)</li> <li>• Sub</li> </ul>
3. <b>EDHC</b> <b>(Time Input Roster)</b> (Make sure to input the hours on the WSP Distribution Line. The WSP Indicator Code will appear in the WSP Column.)  ➔ <b>Press PF5</b>  ➔ <b>Press PF8</b> (to advance to the next input page for the same location/account/fund/sub number.)	Total Time:	Number of Hours Worked

- CAUTION:** You may not add information to the IDTC screen. If an employee is missing from the IDTC screen or the WSP Code is missing from an employee's record, you must:
1. Check the employee's information on the EAPP and/or EPER screens to determine the reason the employee does not appear on the IDTC screen,
  2. Make any corrections necessary,
  3. Allow the system to update the information over night,
  4. Input the employee's hours on the IDTC screen, and
  5. Update the hours.

## On-Time Payroll Reporting (IDTC)

### **REASONS WHY AN EMPLOYEE'S NAME MAY NOT SHOW ON THE ROSTER**

1. The wrong account/fund was entered in the PPS system,
2. The student may have "inactive" status,
3. The pay cycle might be wrong,
4. The time or leave codes might not be correct, and
5. The student might have another "home" department.

## Late Pay Reporting (EDLR):

Late Pay is reported on the EDLR screen. "Late Pay" refers to payroll reported AFTER the regular payroll time reporting period has passed. "Late Pay" was formerly reported on "Specials."

Directions:

	<u>Menu/Screen:</u>	<u>In this Field:</u>	<u>Input:</u>
1.	<b>PPS Main Menu</b>  ➡ <b>Press Enter</b>	Next Func:	EDAT
2.	<b>EDAT Screen</b>  ➡ <b>Press Enter</b>	Next Func:  ID:  Pay Cycle:  Pay End:	EDLR  Employee's Payroll ID Number  MA (Monthly Arrears) or MO (Monthly)  Pay Period End Date in which the transaction will be processed.
3.	<b>EDLR Screen</b>  ➡ <b>Press Enter</b>	Command (====>)	R (space) WSP Distribution Number i.e.: R(space) 12
4.	<b>EDLR Screen</b>  ➡ <b>Press PF5</b>	Tr:  Per End:  Time:	LX  Pay Period End Date for the period when the time was actually worked  Number of hours actually worked

## Late Pay/Reduction In Time Reporting (EDLR):

Late Pay/Reductions in Time (Formerly know as LX/RXs) are now reported on the EDLR screen. “Late Pay/Reduction in Time” is always used to correct earnings which should have reported to an employee’s Work-Study Allocation, but did not.

Directions:

	<u>Menu/Screen:</u>	<u>In this Field:</u>	<u>Input:</u>
1.	<b>PPS Main Menu</b>  ➔ <b>Press Enter</b>	Next Func:	EDAT
2.	<b>EDAT Screen</b>  ➔ <b>Press Enter</b>	Next Func:  ID:  Pay Cycle:  Pay End:	EDLR  Employee's Payroll ID Number  MA (Monthly Arrears) or MO (Monthly)  Pay Period End Date in which the transaction will be processed
3.	<b>EDLR Screen</b>  ➔ <b>Press Enter</b>	Command (====>)	R (space) WSP Distribution Number i.e.: R(space) 12
4.	<b>EDLR Screen</b>  ➔ <b>Press PF5</b>	Tr:  Per End:  Time:	LX  Pay Period End Date for the period when the time was actually worked  Number of hours actually worked
5.	<b>EDLR Screen</b>  ➔ <b>Press Enter</b>	Command (====>)	R (space) WSP Distribution Number  Then, the employee's Distribution Line information will re-appear on the screen. Note: The Late Time (LX) work that you just completed will temporarily disappear.
6.	<b>EDLR Screen</b>  ➔ <b>Press PF5</b>	Tr:  Per End:  Time:  WSP:	RX  Pay Period End Date for the period when the time was actually worked  Number of hours actually worked  Asterisk (*) out the WSP Code  After the information updates, both the Late Time (LX) and Reduction in Pay (RX) portions will appear on the screen.

**EXHIBIT I: DISTRIBUTION OF PAYROLL EXPENSE LEDGERS:  
THE “PPP’S” And WORK-STUDY**

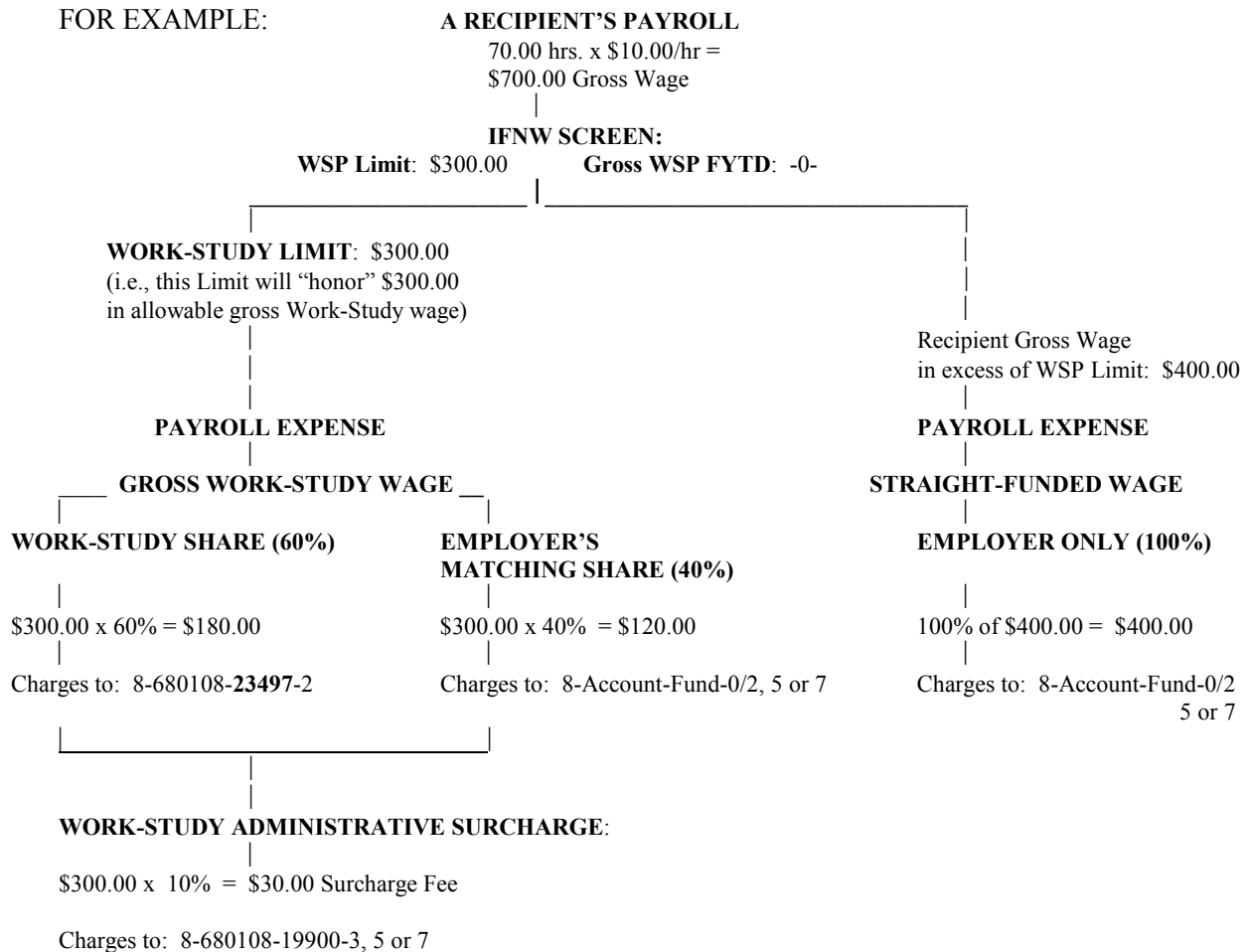
These are v-e-r-y abbreviated sample PPP’s that display the distribution of payroll expense when a recipient’s Limit *closed* as payroll passed. The Limit closed because the student’s current month gross wage exceeded her remaining Work-Study award funds by \$400.00.

PPP5320/PPP530		UNIVERSITY OF CALIFORNIA—SANTA BARBARA DISTRIBUTION OF PAYROLL EXPENSE			
PROCESS MONTH:	<b>DECEMBER</b>				
ACCOUNT TITLE <b>BIOLOGY RES.</b>	FUND TITLE <b>GENERAL FUNDS</b>	<b>8-111111-</b>		MAIL TO:	<b>BIOL</b>
				<b>-22222-</b>	
EMPLOYEE NAME	EMPLOYEE I.D.	PERIOD END DATE	TIME	PAY RATE	GROSS EARNINGS
SUBACCOUNT 2					
<b>BARTON, CLARA</b>	<b>123456789</b>	<b>123102</b>	<b>012:00</b>	<b>100000</b>	<b>12000</b>
<b>BARTON, CLARA</b>	<b>123456789</b>	<b>123102</b>	<b>040:00</b>	<b>100000</b>	<b>40000</b>
CURRENT MONTH					<b>52000</b>

PPP5320/PPP530		UNIVERSITY OF CALIFORNIA—SANTA BARBARA DISTRIBUTION OF PAYROLL EXPENSE			
PROCESS MONTH:	<b>DECEMBER</b>				
ACCOUNT TITLE <b>BIOLOGY RES.</b>	FUND TITLE <b>COLLEGE WORK-STUDY</b>	<b>8-111111-</b>		MAIL TO:	<b>BIOL</b>
				<b>-23499-</b>	
EMPLOYEE NAME	EMPLOYEE I.D.	PERIOD END DATE	TIME	PAY RATE	GROSS EARNINGS
SUBACCOUNT 2					
<b>BARTON, CLARA</b>	<b>123456789</b>	<b>123102</b>	<b>018:00</b>	<b>100000</b>	<b>18000</b>
CURRENT MONTH					<b>18000</b>

## DISTRIBUTION OF PAYROLL EXPENSE FOR WORK-STUDY WAGE

- A. The Accounting Office issues the Distribution of Payroll Expense (PPP5302/PPP530) ledgers (a.k.a. the PPP's) which reflect fund activity in response to payroll activity.
- B. As exemplified in Exhibit J, Pg. 44, WSP payroll activity generates a pair of PPP ledger pages that:
1. Rely on the employer's account name and number to "lead" each ledger page; but
  2. Distinguish themselves by their individual fund titles and fund numbers; and
  3. Reflect the proportional breakdown of payroll expense that is characteristic of Work-Study wage:
    - a. 60% payroll expense charged to Work-Study funds (e.g., 23497-2, 18026-2) and
    - b. 40% payroll expense charged to the employer's (payroll) funds on Sub 0, 2, 5 or 7.
- NB: Straight-funded wage charges 100% payroll expense to the employer's payroll funds alone.



## THE WORK-STUDY ADMINISTRATIVE SURCHARGE FEE

The Work-Study Administrative Surcharge Fee:

- A. Is a non-payroll expense paid by the Work-Study employer; and
- B. Directly supports the administration of the Work-Study Program; and
- C. Is assessed at 10% of the recipient's *gross* Work-Study wage; and
- D. Charges the employer's LOCATION/ACCOUNT/FUND/SUB 3, 5 or 7 when the employer's Matching Share (payroll expense) charges the Sub Account: 0/2, 5 or 7, respectively; and
- E. Appears in SUMMARY fashion on the departmental GLO 60 ledgers as shown in this abbreviated sample:

<b>GLO 60 DEPARTMENTAL REPORT OF APPROPRIATIONS AND EXPENDITURES</b>					
OBJ -----	DESCRIPTION -----	TE	VOU	DATE	
EXPENDITURE					
SUB ACCOUNT 3 - SUPPLIES AND EXPENSE					
<b>7295</b>	<b>WORK STUDY ADM DEC</b>	<b>53</b>	<b>08D56</b>	<b>123102</b>	<b>170.00</b>

- F. Appears in line-item DETAIL on the WORK STUDY SURCHARGE REPORT as shown in this abbreviated sample:

<b>WORK STUDY SURCHARGE REPORT</b>								
ACCOUNT	FUND	SUB	EMP ID	NAME	WS	PAY	GROSS	
SURCHARGE					CODE	PERIOD		
<b>654321</b>	<b>12345</b>	<b>2</b>	<b>123456789</b>	<b>DOGG, P.</b>	<b>F</b>	<b>123102</b>	<b>700.00</b>	<b>70.00</b>
<b>654321</b>	<b>12345</b>	<b>2</b>	<b>987654321</b>	<b>DRIFTER</b>	<b>F</b>	<b>123102</b>	<b>1000.00</b>	<b>100.00</b>
TOTAL FOR ACCOUNT: 654321							<b>170.00</b>	

SPECIAL NOTE: Contact the WSP Office (Ext. 8923) or email ([wsp@sa.ucsb.edu](mailto:wsp@sa.ucsb.edu)) for a copy of this WORK STUDY SURCHARGE (detail) ledger.

## **PRESIDENT'S WORK-STUDY PROGRAM (PWSP)**

- A. The Office of International Students and Scholars (OISS):
1. Receives and reviews international student/scholar applications to participate in the Program;
  2. Establishes recipient eligibility requirements;
  3. Assesses applicant eligibility;
  4. Assigns (and revises) actual PWSP awards; and
  5. Issues PWSP Referrals.
- B. The FAO/Work-Study Program Unit:
1. Receives the PWSP Referral(s) from the employer(s); and
  2. Updates WSP Limit(s) for PWSP recipients; and
  3. Assists OISS in monitoring PWSP wage as earned.
- C. To be eligible for PWSP consideration, the international student/scholar must:
1. Hold a student, F-1 Visa; and
  2. Demonstrate financial need -- as per OISS guidelines; and
  3. Plan to be a full-time, enrolled student at UCSB for the coming academic year; and
  4. Meet a minimum (cumulative) GPA standard -- as established by OISS; and
  5. Meet a UCSB attendance standard -- as established by OISS; and
  6. Apply or re-apply annually during May for the coming fiscal year.
- D. The employment and payroll procedures for the PWSP recipient mirror those for the Federal WSP recipient.
- E. Unlike Federal Work-Study, OISS:
1. Awards President's Work-Study awards for the fiscal year beginning July 1; and
  2. Cancels unused/unearned PWSP awards as of January 1; and
- NB: A stale-dated PWSP Referral is one dated before but presented after January 1<sup>st</sup>.

## **PRESIDENT'S WORK-STUDY PROGRAM (PWSP)**

E. Unlike Federal Work-Study, OISS (continued):

3. Allows the Summer PWSP recipient to carry forward unused award funds to continue employment in the Academic Year award period; which requires:
  - a. The employer:
    - 1) To request and receive from the recipient, a PWSP Referral for each award period:
      - a) Summer and/or
      - b) Academic Year; and
    - 2) To create/add a separate and distinct PWSP Distribution Line for each award period--each Distribution Line will carry the WSP Indicator Code related to the award period:
      - a) WSP Code "M" for the Summer period (July 1, 2002-September 30, 2002); and
      - b) WSP Code "P" for the Academic Year (September 1, 2002-June 13, 2003).
  - b. OISS to confirm gross PWSP wage earned during the Summer (if any) and to assign the remaining PWSP award (if any) to the Academic Year when the recipient so requests; and
  - c. The WSP Unit staff to:
    - 1) Reduce the recipient's Summer WSP Limit to equal the recipient's gross (Summer) PWSP wage, as so directed by OISS; and
    - 2) Create a WSP Limit for the Summer and/or Academic Year award periods as appropriate and upon receipt of the recipient's PWSP Referral(s).

# GLOSSARY

<b><u>TERM</u></b>	<b><u>DEFINITION</u></b>
AY	Academic Year (September through June)
EIN	Employee Identification Number which looks like the SSN without the dashes
EMPLOYER	The recipient's immediate supervisor; the departmental staff who prepare employment and/or payroll; the departmental Chairperson, Director, MSO
FA, FAO	Financial Aid, Financial Aid Office
FWSP; FWS	Federal Work-Study Program; Federal Work-Study
GA	General Assistance or General Assistance Funds; sometimes used to mean straight-wage or non-Work-Study funded wage for which the employer pays 100% of the payroll expense involved
GRAD	Graduate; graduate student
GSR	The academic payroll title: Graduate Student Researcher
INFW	Work-Study (Limit and Gross Wage) Inquiry Screen in PPS
LX	Late pay; a payroll transaction that will debit (charge) payroll expense
LX/RX	Originally the <b>PAYROLL TIME REPORTING ADJUSTMENT WORKSHEET/UPAY 644-D</b> ; a prior payroll adjustment transaction involving a debit (LX) and credit (RX) action
NB	Note Bene: Note well, take note
OISS	Office of International Students and Scholars
PPP(s)	<b>DISTRIBUTION OF PAYROLL EXPENSE/PPP5302/PPP530</b> Ledgers are issued by Accounting's Payroll Division and reflect/record how payroll expense charged in response to gross wages paid
PPS	Personnel/Payroll System
PREPRINT(s)	The preprinted payroll(s) issued by Accounting's Payroll Division for employers who still report payroll "on paper" rather than "on-line."  <ol style="list-style-type: none"><li>1. <b>PAYROLL TIME REPORTING WORKSHEET/UPAY 644A, POSITIVE MONTHLY ARREARS</b></li><li>2. <b>PAYROLL TIME REPORTING WORKSHEET/UPAY 644A, POSITIVE MONTHLY CURRENT</b></li></ol>

## GLOSSARY continued:

<u>TERM</u>	<u>DEFINITION</u>
PWSP; PWS	(The) President's Work-Study Program; President's Work-Study
RECIPIENT	A financial aid recipient who has a Work-Study award; a Work-Study recipient; a student employee hired on Work-Study
REFERRAL	The recipient's Work-Study Referral form
RX	Reduction in pay; a payroll (adjustment) transaction that will credit payroll expense
SPECIAL, SPECIAL PAYROLL	<b>PAYROLL TIME REPORTING WORKSHEET/UPAY 644A-8</b> for employers who still report payroll "on paper" rather than "on-line."
SSN	Social Security Number
STALE-DATED	Old; potentially no longer valid; refers to the Referral Date and award status of the recipient's Work-Study Referral; e.g. a stale-dated Referral may present/reference a Work-Study award that is no longer valid, that has been canceled
STRAIGHT	Regular; i.e., straight time, straight funded, straight wage
STRAIGHT FUNDS	Regular or non-Work-Study funds wherein the employer pays 100% payroll expense
STRAIGHT-WAGE	Regular hourly wage or pay rate; as opposed to a premium overtime pay rate at one and one-half times the regular pay rate
TA	The academic payroll title: Teaching Assistant
THRESHOLD	The maximum dollar value of the recipient's WSP Limit and WSP award assigned to the employer
TIME	Actual time worked in hours and/or percent time; hours or percent time reported to payroll
UGRAD	Undergraduate; undergraduate student
WS, W/S	Work-Study
WSP	(The) Work-Study Program; the Work-Study Program or <b>WSP</b> field of a payroll Distribution Line as found in PPS; etc.