

# FINANCIAL AID AND SCHOLARSHIPS



## Agenda

- Work-Study Program Overview
- Requesting Work-Study
- Shared Service Center Overview
- Processing Direct Retros/SCTs
- Resources



## What is the Work-Study Program?

Work-Study promotes part-time employment for students who have financial need. It allows students to earn financial aid through employment which is paid in the form a payroll check for hours worked.

- In addition to meeting educational expenses, it offers an opportunity for students to gain work experience and provide:
  - essential services to the University and community
  - practical training and experience in their chosen field
  - an impressive resume and recommendation from former employers
- Offers Federal and Institutional funds on a first-come, first-served basis for undergraduate and international students who are eligible.
- Provides a wage subsidy so employers pay only portion of the student's pay. Earnings split Work-Study 75%, department 25%.

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## Work-Study Eligibility

#### Eligibility:

- Students who complete the Free Application for Federal Student Aid (FAFSA)
  - AB540 and international students who are eligible to work in the U.S.
    - AB540 undocumented students' need is determined by the California Dream Act Application (CADAA).
    - International students must complete a Work-Study application to be considered for Institutional funds.
- Students with Student Aid Indexes (SAI) of less than or equal to \$25,000 and financial need greater than or equal to \$1,000.
- Must maintain 6 units per quarter.
- Must maintain Satisfactory Academic Progress (SAP).
- Awards begin on July 1 and end on June 30 of each aid year.



## Handshake for UC Davis Departments

- Setting up your Handshake account
- https://support.joinhandshake.com/hc/en-us/articles/115011549548-How-to-Create-an-Employer-Account-Linked-to-Your-Student-Account
  - Name: UC Davis Internship and Career Center
  - Step 4: Connect to UC Davis (the school)



### Developing Effective Job Descriptions

• Job descriptions are an important and beneficial first step in the hiring process. Properly prepared, a job description sets the tone and lays the foundation for the student's employment experience.

### Job Description Guidelines

- A strong job description serves as the foundation for a successful hiring process.
- List the essential functions, responsibilities, and duties of the position (5-10).

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#### The Job Qualifications

Conveys the expectations of the job.

• List all skills, knowledge, abilities, and experience necessary to be successful in the job.

• Provides a basis for measuring performance.



- As a result of this program, the student will be able to (Career Competencies):
  - Administrative Skills
    - Use word processing software to correctly format and complete business documents in mailable formats.
    - Produce complex documents containing graphics and tables with relative speed and efficiency.
    - Produce multiple documents required by a variety of office settings.
    - Accurately key mailable documents at 50 words per minute.



- As a result of this program, the student will be able to (Career Competencies):
  - Oral and Written Communication Skills
    - Use good human relations skills, in interpersonal interactions, verbal, and written communications.
    - Develop a written presentation on an assigned topic.
    - Edit, format, proofread, and compose correspondences that meet course mailability requirements and business standards.



## Job Descriptions Dos and Don'ts

#### • DO:

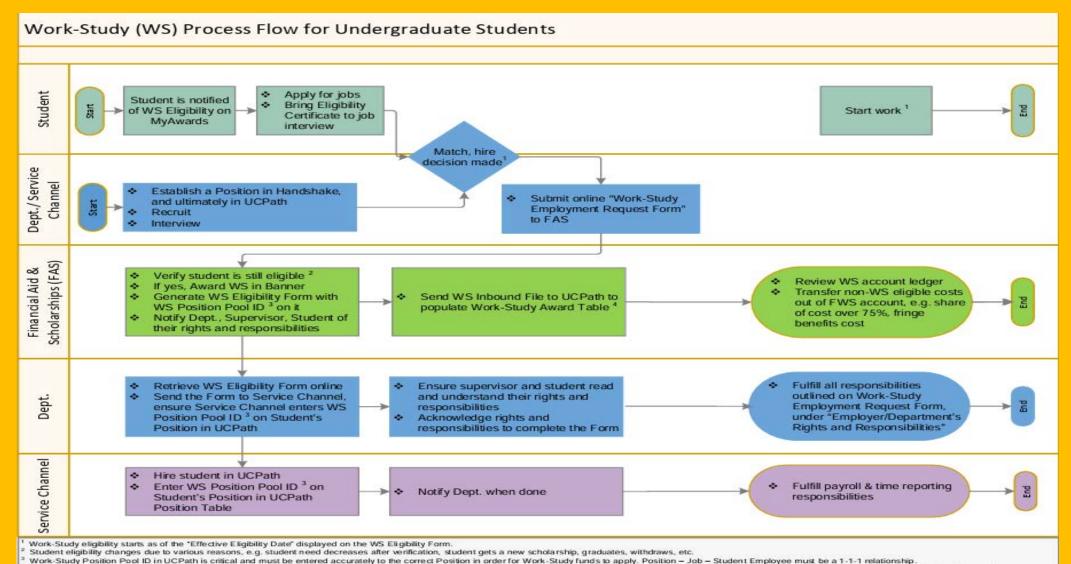
- Use a factual and impersonal style when writing the job description.
- Base the job description on the department's needs.
- Write an accurate, concise, and complete job description.
- Use complete sentences.

#### • DON'T:

- Use the narrative form when writing a job description.
- Base the content of the job description on the capabilities, skills, and interests of the incumbent.
- Write the job description based upon the desired job classification.

# **Work-Study Student Hiring Process - UG**





WS Award record will only populate in UCPath when a student has a valid UCPath Employee ID. If not, FAS will hold the award in Banner and notify dept. to take action for reasonable amount of time before canceling the award

### **Work-Study Checklist**





#### WORK-STUDY CHECKLIST

#### STUDENTS:

- Review Work-Study website for rights, and responsibilities regarding participation as a Work-Study employee.
- Once notified of Work-Study Eligibility, download the Work-Study Eligibility Certificate from MyAwards.
- Apply for positions via <u>Handshake</u>. Upload the Work-Study Eligibility Certificate in Handshake to send to employers to show you're eligible for Work-Study.
- Provide the Work-Study Eligibility Certificate to employer during the interview.
- Complete any pending requirements as soon as possible, especially if notification is sent from Work-Study Manager.
- ☐ When approval notification is received, acknowledge your rights and responsibilities to complete the form.
- Inform the Work-Study Manager and your employer if you leave UC Davis, graduate, withdraw or are dismissed from school
- □ Inform Work-Study Manager of any changes that may affect your aid such as additional resources and/or outside scholarships.
- Do not work during scheduled class times, any exceptions (e.g., class is cancelled) must be documented by your supervisor.
- ☐ Contact the Work-Study Manager with any questions or concerns.

#### **DEPARTMENTS/SUPERVISORS:**

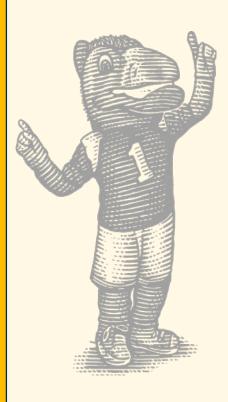
- Establish a position(s) in <u>Handshake</u>, recruit and interview.
- ☐ Ask the student for their Work-Study Eligibility Certificate.
- Review <u>Work-Study website</u> for rights, responsibilities, policies and procedures regarding participation as a Work-Study Employer.
- Submit a Work-Study Online Request Form.
- Review approval notification when it is received (Supervisor only).
- Ensure that students do not work during scheduled class times. Any exceptions (e.g., class is cancelled) must be documented (Supervisor only).
- Once the request has been approved, acknowledge rights and responsibilities to complete the request and download the Work-Study Service Channel Form.
- Include Work-Study Service Channel Form in the ticket submitted to hire student in UCPath (if another person is responsible for this task, forward the form to them. Please DO NOT include the Work-Study Eligibility Certificate in the Service Channel ticket.)
- □ Ensure Service Channel enters Work-Study Position Pool ID (PPID) on the student's Position in UCPath by checking the Cognos 208 Work-Study Award Balance Report.
- Ensure supervisor and student read and understand their rights and responsibilities.
- Review payroll ledger on a monthly basis to ensure that Work-Study funds are appropriately expended and split, and ensure that any necessary corrections are made within 30 days.
- Contact the Work-Study Manager with any questions or concerns.

financialaid.ucdavis.edu/work-study | Work-Study FAQs

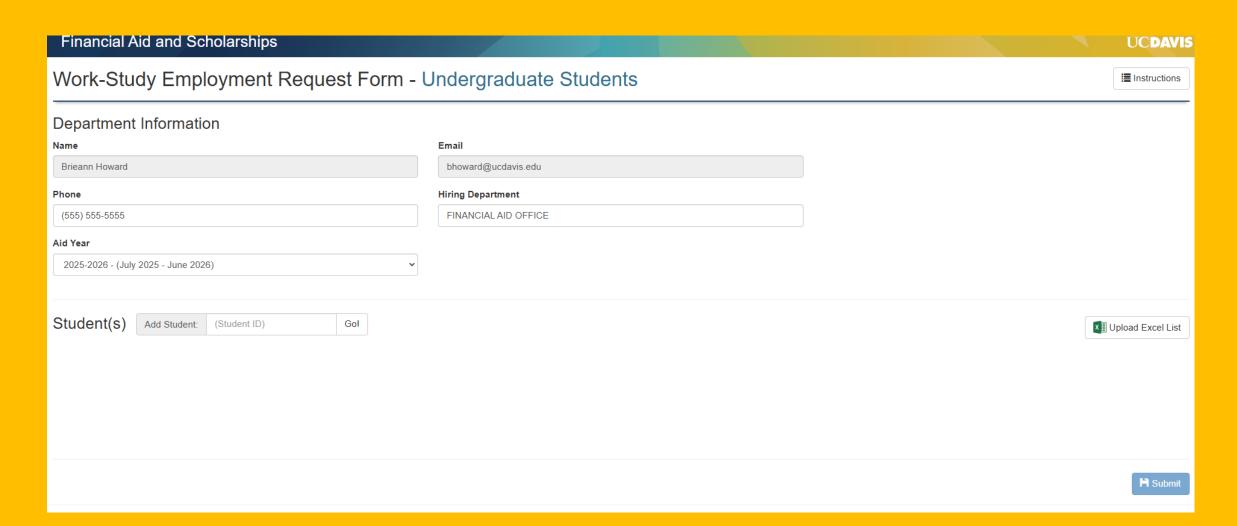




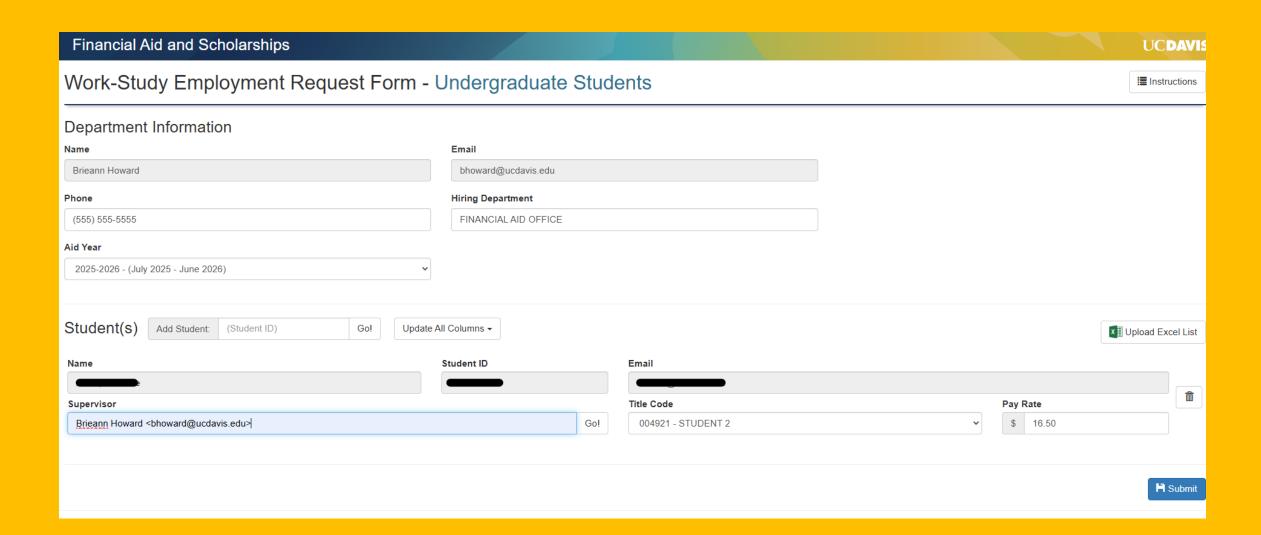
- Approve:
  - Department will receive an email to complete the request
  - Once request has been completed, print Work-Study Service Channel Form
  - Send the form to Service Channel and ensure PPID is entered into UCPath
- Deny:
  - Department will receive an email and reason will be noted in the comment section of the request
  - WSM will notify the student and provide resources (if applicable)
- On Hold:
  - Department will receive an email that additional information is needed from the student
  - WSM will notify the student of pending requirement(s) with a due date to complete













Award Fund Code:	FIS Account:	Award:							
WORK	SP0025WORK-8500372-501002-TASK01	\$4,000							
Work-Study UCPath Position Pool ID:	Effective Eligibility Date:	* The award amount reflects the student's total work- study gross earnings, including the employer's share.							
F	7/1/2025	study gross carrings, including the employer's share.							
* The Position Pool ID may change each academic year depending on type of funding available at time of awarding	* Work-study funds may not be used prior to this date.								
Funding is subject to change based of student's financial aid status and supersedes any previously assigned eligibility. The award amount may include prior earnings for this period if it is a "revised" award.									
Automated Calculation Log (Internal Only)									
Added WORK award for \$4,000. Reduced 0SLFHL from	Added WORK award for \$4,000. Reduced 0SLFHL from \$7,500 to \$3,500.								
ACADEMIC AWARD PERIOD: JULY 01, 2025 - JUNE 30, 2026									
THE WORK-STUDY AWARD LISTED ABOVE:									
<ul> <li>Supersedes any previously assigned eligibility.</li> <li>Is the maximum amount of work - study gross earnings that may be earned by the student during this period.</li> <li>May include prior earnings for this period if it is a "revised" award.</li> </ul>									
EMPLOYER/DEPARTMENT'S RIGHTS AND RESPONSIBILITIES:									

- . Review the Work-Study Website for rights, responsibilities, policies and procedures regarding participation as a Work-Study Employer.
- . Review the Work-Study Checklist for participating in the Work-Study program.
- The hiring of this student employee will not displace a career employee and I understand that the student may no longer be eligible for work-study if the student leaves UC Davis, graduates, withdraws, or is dismissed from school.
- Pay 100% of any earnings which exceed the student's current award and 100% of any fringe benefits, including holiday, vacation and sick hours and for any hours submitted after the established June 30 payroll. Complete the timesheet verifying hours worked, along with both the student's and supervisor's signatures.
- . Ensure that students do not work during scheduled class times. Any exceptions (e.g. class is cancelled) must be documented.
- Review payroll ledger on a monthly basis to ensure that work-study funds are appropriately expended, and split and ensure that any necessary corrections are made within 30 days.



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- . Ensure that students do not work during scheduled class times. Any exceptions (e.g. class is cancelled) must be documented.
- Review payroll ledger on a monthly basis to ensure that work-study funds are appropriately expended, and split and ensure that any necessary corrections are made within 30 days.

#### Complete the job hire in UCPath

The Work-Study Service Channel Form (pdf), downloadable from the button below, will need to be sent to your service channel to complete the job hire in UCPath. Please ensure the service channel staff add the Position Pool ID (provided on the Form) to your student's Position in UCPath.

Please know that the Work-Study funds will only be applied after 1) your student's Position has a Position Pool ID as provided, and 2) this Work-Study Employment Request Form has been fully completed.

The Work-Study Service Channel Form (pdf) wil be available for download as soon as the department responsibilities section has been acknowledge/completed.



✓ I acknowledge that I have read the above information and will complete any necessary steps (6/27/2025 3:38 PM by

Mork-Study Service Channel Form

#### STUDENT EMPLOYEE'S RIGHTS AND RESPONSIBILITIES:

- Review the Work-Study Website for rights, and responsibilities regarding participation as a Work-Study Employee.
- Review the Work-Study Checklist for participating in the Work-Study program.
- Inform Financial Aid and Scholarships and their Employer if you leave UC Davis, graduate, withdraw or are dismissed from school.
- . Inform Financial Aid and Scholarships of any changes that may affect your aid such as additional resources, outside scholarships and/or changes in enrollment status. The award may be adjusted or cancelled upon notification of changes, which may cause a bill for the student and/or the employer.
- Report benefit hours such as sick leave or vacation on your timesheet.
- Do not work during scheduled class times, any exceptions (e.g. class is cancelled) must be documented.

## Work-Study Service Channel Form



#### -----FOR SERVICE CHANNEL USE-----

UC DAVIS Undergraduate 2025-2026 WORK-STUDY EMPLOYMENT ELIGIBILITY FORM

#### ELIGIBILITY PERIOD

Effective Eligibility Date: 7/1/2025

Note: Work-Study funds may not be used prior to the effective eligibility date. Funding is subject to change based on student's financial aid status.

Award Period: July 01, 2025 - June 30, 2026

#### AWARD INFORMATION

Student Name: Student ID: Department: MICROBIOLOGY & MOLEC GENETICS

Title Code: 004921 - STUDENT 2 Pay Rate: 16.50

Work-Study Account: SP0025WORK-8500372-501002-TASK01

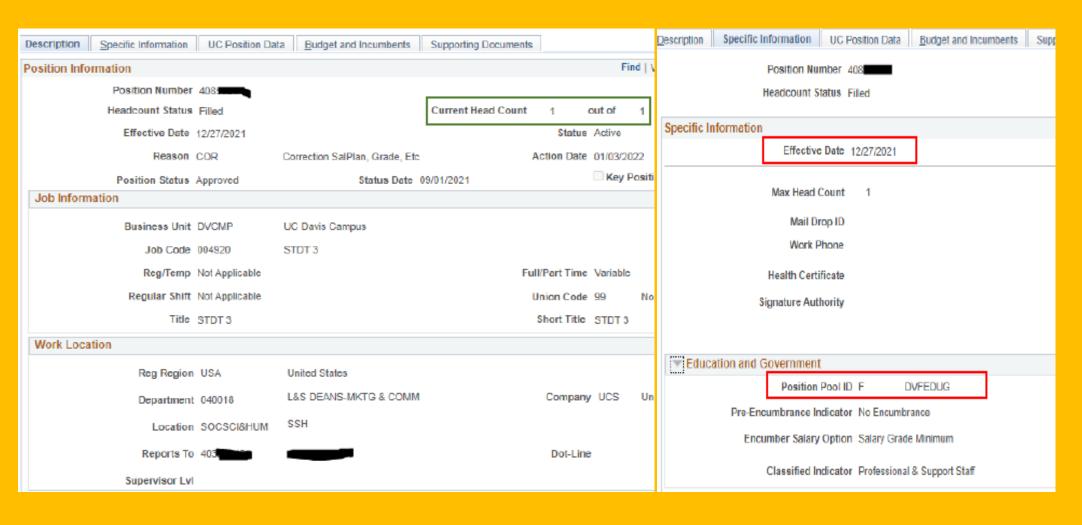
Award Amount\*: \$4,000

Work-Study UCPath Position Pool ID (PPID)\*\*: F

\*\*NOTE: The work-study UCPath PPID must be entered into UCPath for Work-Study to be linked.

## From "SC Form" to UCPath Position Table





## Verify Work-Study Setup Cognos Report 208



UCP-208 Work Study Award Balance Report >

#### UCP-208 Work Study Award Balance Report

UCP-208 is used to monitor Work-Study student employees' award amount and balance for the current fiscal/award academic year. An employee's Work-Study is fully established and applies to earnings only when both the Work-Study award is in UCPath Work Study Award Table and a Position Pool ID is properly added to the employee's Position in UCPath. Report 1 – Fully Established Work-Study Award Balance Report displays all employees whose Work-Study is fully established as described above. Please start with this report.

If an employee is not in Report 1, select Report 2 - Work-Study Award in Work-Study Award Table Only. An employee in Report 2 but not Report 1 indicates a Position Pool ID is not properly added to the employee's Position. The employee's department shall work with service channel to complete the Position Pool ID entry. Work-Study will not apply until the entry is complete.

If an employee does not display in both reports but their Work-Study is approved by Financial Aid & Scholarships office, contact workstudy@ucdavis.edu.

#### Report Type

Report 1 – Fully Established Work-Study Award Balance Report Report 2 - Work-Study Award in Work-Study Award Table Only

#### UCP-208 Report 1

# FINANCIAL AID AND SCHOLARSHIPS



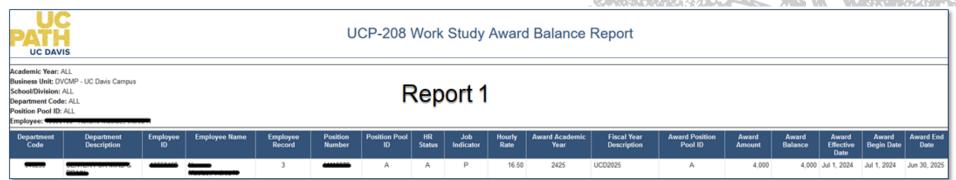
Report 1





## Verify Work-Study Setup – UCP-208 Report 1

- Student in Report 1 Setup is Complete
  - 1) Active Job, 2) WS Award in Table, 3) WS PPID in Position Table
  - 4) PPID in WS Award Table and Position Table Match
- Report Sample
  - Undergraduate Students







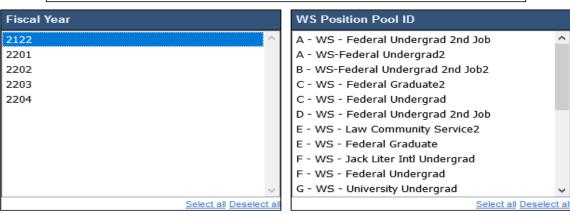
#### UCP-208 Report 2



**Note:** This report displays data from UCPath Work-Study Award Table only. Report is ran by employee(s) not by Business Unit and School/Division. If an employee is in this report but not in Report 1, the employee's department shall work with service channel to complete Position Pool ID entry to the employee's Position. Work-Study will not apply until the entry is complete.



Report 2



## Verify Work-Study Setup – UCP-208 Report 2

- Student in Report 2 Setup is NOT Complete
  - 1) Active Job, 2) WS Award in Table
  - WS PPID is NOT Entered in Position Table or Entered Incorrectly
- Report Sample
  - Undergraduate Students

UC WS Award Employee ID	UC WS Award Academic Year	UC WS Award Set ID	UC WS Award Session Code	UC WS Award Position Pool ID	UC WS Award Amount	UC WS Award Balance	UC WS Award Effective Date
10400572	2122	DVCMP	AY	F	3,500	3,500	11-Jul-21

- Action Required
  - Ask Service Channel to Make Corrections Immediately
  - Process Direct Retro if Applicable



## **Ensure a Successful Work-Study Setup**

Tips for a Successful Setup

Promptly Send the "WS Service Channel Form" to Service Channel

Use Cognos Report 208 to Track and Review

Complete Monthly Ledger Review





## Review Work-Study Split Cognos Report 339



Expense 7	Natural Ac	Fiscal Year	Financial D Al	t Accoun Employee Nam Employee	Employee	Position Nu	Departmer Departmer Job C	Code Job Code	UC Earn End Date Earn Code	FTE	UC Percent M	Ionetary /
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Aug 17, 2024 REG	0.250000	1	617.50
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Aug 31, 2024 REG	0.250000	1	637.82
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Sep 14, 2024 REG	0.250000	1	467.19
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Sep 28, 2024 REG	0.250000	0.9091	398.13
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Oct 12, 2024 REG	0.250000	0.0339	16.25
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Oct 12, 2024 REG	0.250000	0.9661	463.13
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Oct 26, 2024 REG	0.250000	0.7143	434.69
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Nov 9, 2024 REG	0.250000	0.5351	247.81
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Nov 9, 2024 REG	0.250000	0.4649	215.31
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Nov 23, 2024 REG	0.250000	0.6667	540.31
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Dec 7, 2024 REG	0.250000	0.8667	422.50
SALARY	501002	2025	1234567 X	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Dec 7, 2024 REG	0.250000	0.1333	65
SALARY	501002	2025	1234567 D	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Jan 18, 2025 REG	0.250000	0.1250	127.72
SALARY	501002	2025	8500372 <b>W</b>	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Jan 18, 2025 REG	0.250000	0.3750	383.16
SALARY	501002	2025	1234567 D	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Feb 1, 2025 REG	0.250000	0.2500	164.36
SALARY	501002	2025	8500372 <b>(W</b>	Gunrock, Aggie 1020000	0 0	12345678	123456 UCD Dept 00492	20 STDT 3	Feb 1, 2025 REG	0.250000	0.7500	493.08

# Shared Service Organization Work-Study Process

- Work-Study Document is Submitted with Onboarding or Recruitment Case
- Update Position Control Position Pool ID (PPID)
  - Update Vacant Position if submitted to HR prior to payroll action
  - If attached to closed case or payroll action has already completed
    - Department will need to submit Work-Study Case type that will route to the payroll team





# Shared Service Organization Process Payroll Work-Study Process

- Receive Funding Change Case for Work-Study
- Ensure Work-Study Service Channel Form is attached to case
- Verify the following before entry:
  - Can we enter with the effective eligibility date?
    - If employee's start date is after the effective eligibility date, the entry will be made with the effective date being the date of hire.
  - Does the employee have an active position yet that matches the information on the form? (If not, will have to wait until position is active as the employee's hire is pending.)
  - Ensure the title code and pay rate match what is in UC Path.
- Process entry with verified information and Position Pool ID



# **Shared Service Organization Process**Timesheet Identifier

 Request a Work-Study Identifier for the TRS Timesheet in the original case







## Central Payroll/UCPath - Salary Cost Transfer

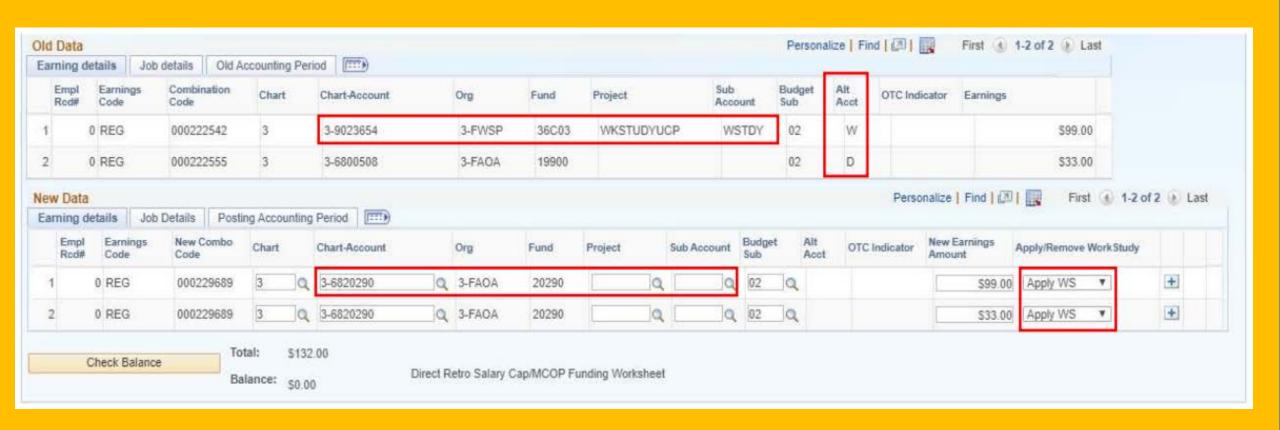
- Select the desired pay period from the dates listed for the employee just as you do for non-work study transfers
- Updates will be in the New Data section of SCT transaction screen
  - Change WS account to a department account (remove Project "WKSTUDYUCP" from Project field and Sub Account "WSTDY" from Sub Account field)
  - Select "Apply WS" from the drop down menu under "Apply/Remove Work Study" for each line item that originally has an "Alt Acct" value, e.g. W, D, under "Old Data" section. Please do not select "Remove WS" or "N/A"



## Salary Cost Transfer – Retroactively Change Department Funding



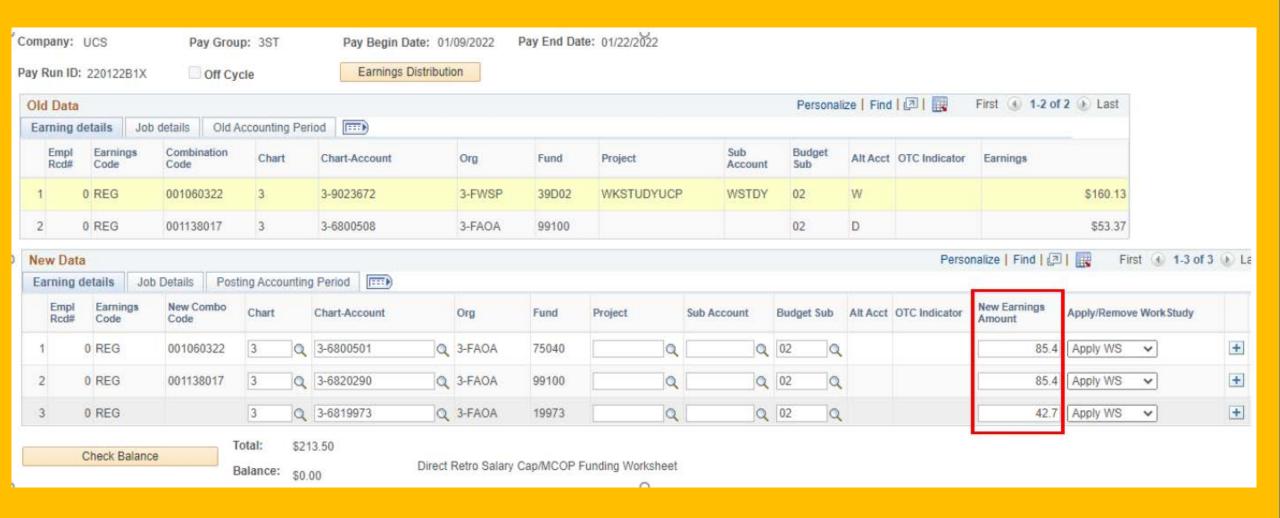
Example #1 – Single Account



## Salary Cost Transfer – Retroactively Change Department Funding



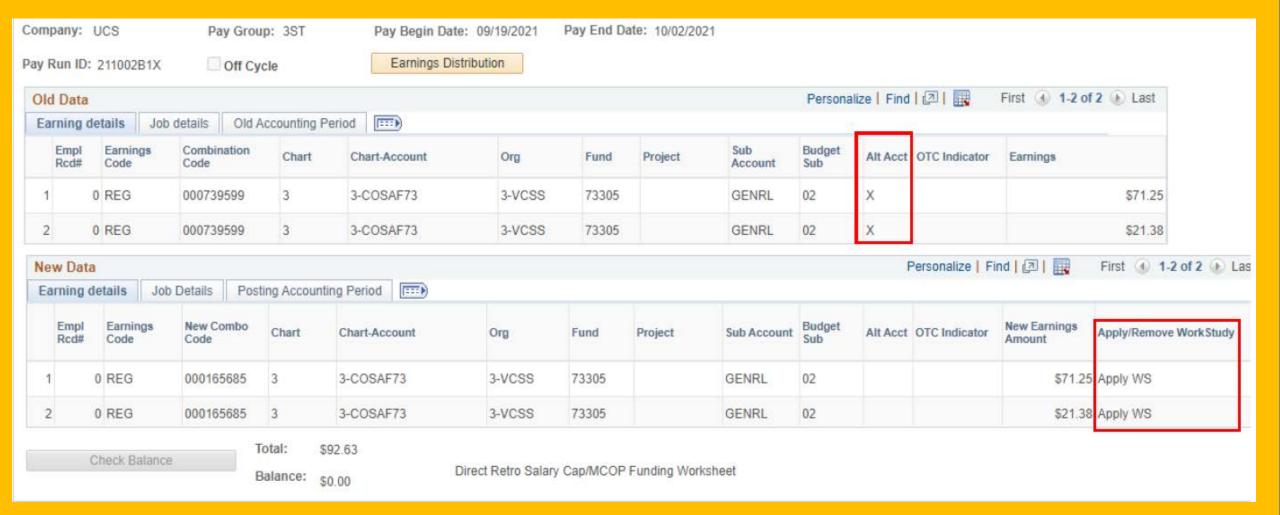
Example #2 – Multiple Accounts



## Salary Cost Transfer— Retroactively Apply Work-Study



Eligible WS Earnings Not Split, but Charged 100% to the Department



## Salary Cost Transfer – Things to Pay Attention to

- Process in a Timely Manner
  - FAQ: Is there a time limit for SCT action?
    - Best practice: process SCT ASAP, within a month from PPE
    - Very challenging if student's WS balance is \$0
    - Follow campus 120-day rule
      - Request exceptional approval from Financial Aid beyond 120 days
  - FAQ: Can the department do a SCT if the PPID is entered after the Effective
    - Date?
      - Yes, follow the same best practice



## Direct Retro – Things to Pay Attention to

- When do You Ask Financial Aid to Help?
  - When Work-Study 75% Split Charged to Department's ERROR Account

	Sub Account	Expense Type		UC Earn End Date	Altacct	UC Pct Total Pay	Monetary Amount
UCDWSP9	WSTDY	SALARY	WKSTUDYUCP	Oct 2, 2021	W	75%	\$ 197.72
DEPTACT		SALARY		Oct 2, 2021	D	25%	\$ 65.91
UCPT000	ERROR	SALARY		Oct 16, 2021	w	75%	\$ 171.00
DEPTACT		SALARY		Oct 16, 2021	D	25%	\$ 57.00

- When You Are Not Sure:
  - Student had a promotion, salary increase or other HR actions
  - Do not use "Remove WS" or "N/A" for now
  - Do not force the system





We are here to help you!

#### Financial Aid and Scholarships

Work-Study Manager – Brieann Howard

Email: workstudy@ucdavis.edu Phone:

530-752-2294



## Central Payroll/UCPath Resources

- https://ucdavis.app.box.com/s/ wcow65w1abpnagdbib3dvpf5o78qffm9/ file/1617686953625
- Contact UCPath Help Desk at UCD at ucpath@ucdavis.edu
  - Submit questions regarding Direct Retro transactions
  - To request Cognos Access visit <a href="http://ucpath.ucdavis.edu/security">http://ucpath.ucdavis.edu/security</a>



