

## Work-Study Undergraduate Department Training

**Presentation Panel:**

Ami Tripp, Assistant Director, Student Employment/Internship & Career Center

Brenda Means, Payroll Coordinator, Shared Service Organization

Carrie Tamber, Lead HR Coordinator, Shared Service Organization

Catherine Li, Associate Director, Financial Aid & Scholarships

Chris Marken, Business Analyst, Administrative IT

Lisa Feldmann, Work-Study Program Manager, Financial Aid & Scholarships



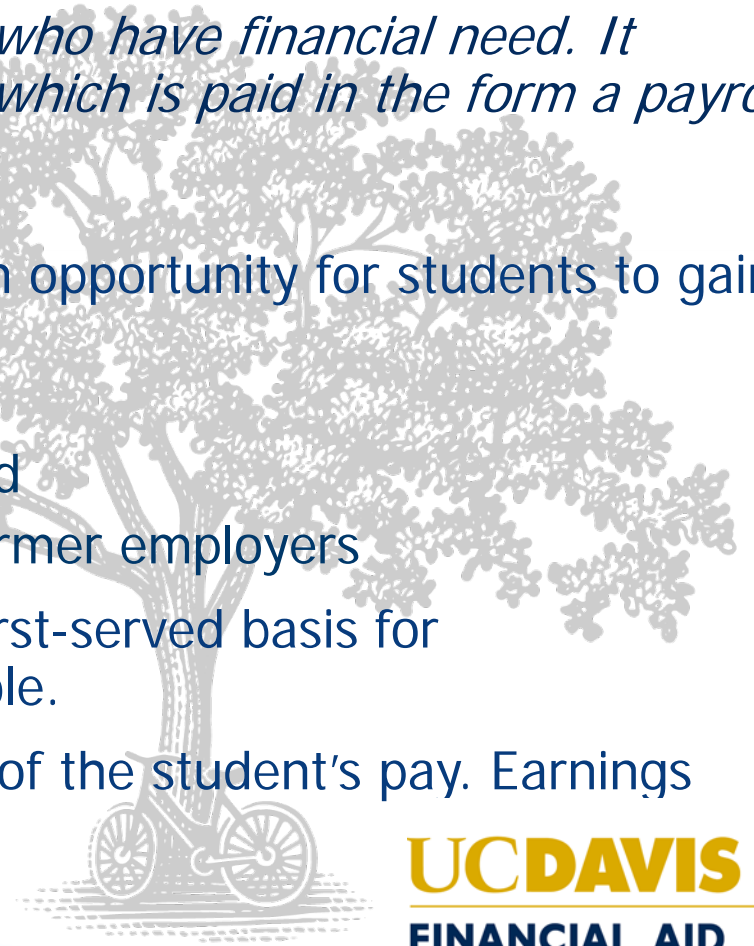
## Agenda

- Work-Study Program Overview
- Handshake/Job Descriptions
- Requesting Work-Study
- Shared Service Center Overview
- Payroll Online Help
- Processing Direct Retros
- Resources
- Q & A

# 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%.

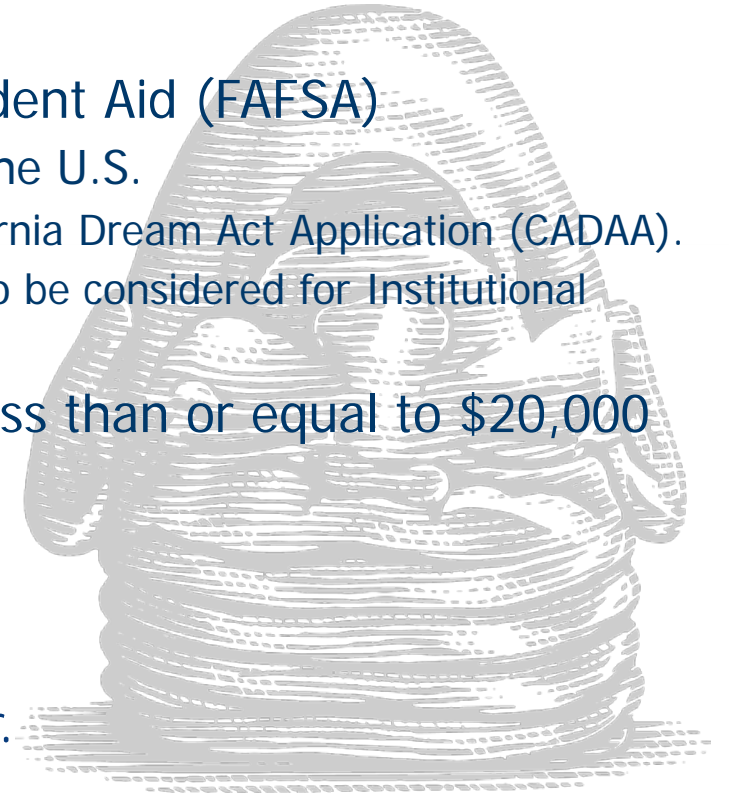


**UCDAVIS**  
**FINANCIAL AID**  
**AND SCHOLARSHIPS**

# 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 and Expected Family Contributions (EFC) of less than or equal to \$20,000 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
  - Who does not use a service channel to post a position?
  - Who does not have a 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)

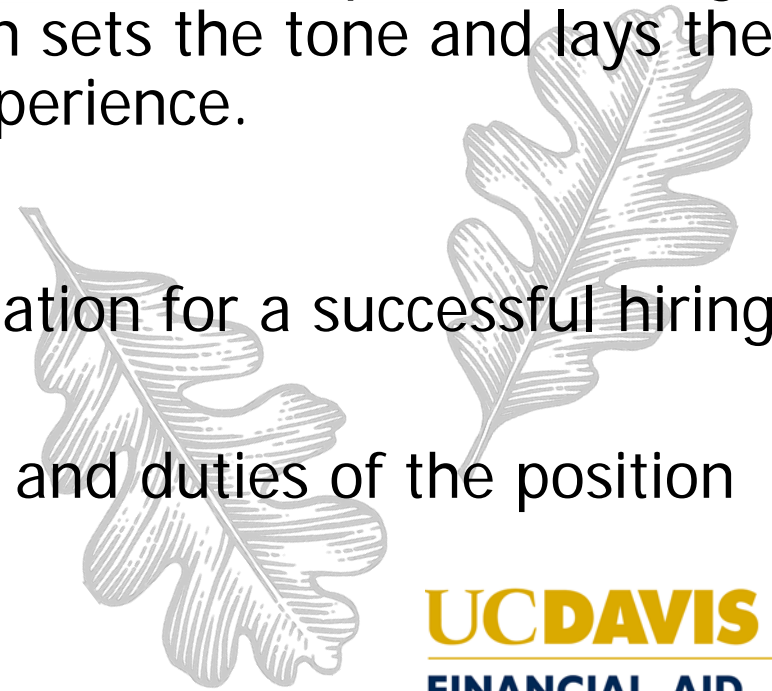
# Job Descriptions

- **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).





# Job Descriptions

- **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.



# Job Descriptions

- **Learning Objectives**

- How to use university software systems to track purchases, work orders and reservations.
- How to guard and protect confidentiality.
- How to build relationships among staff, students and university stakeholders.
- How to create communication content that addresses the administrative need.
- How to interpret policies and procedures.





# Job Descriptions

- **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.



# Job Descriptions

- **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.

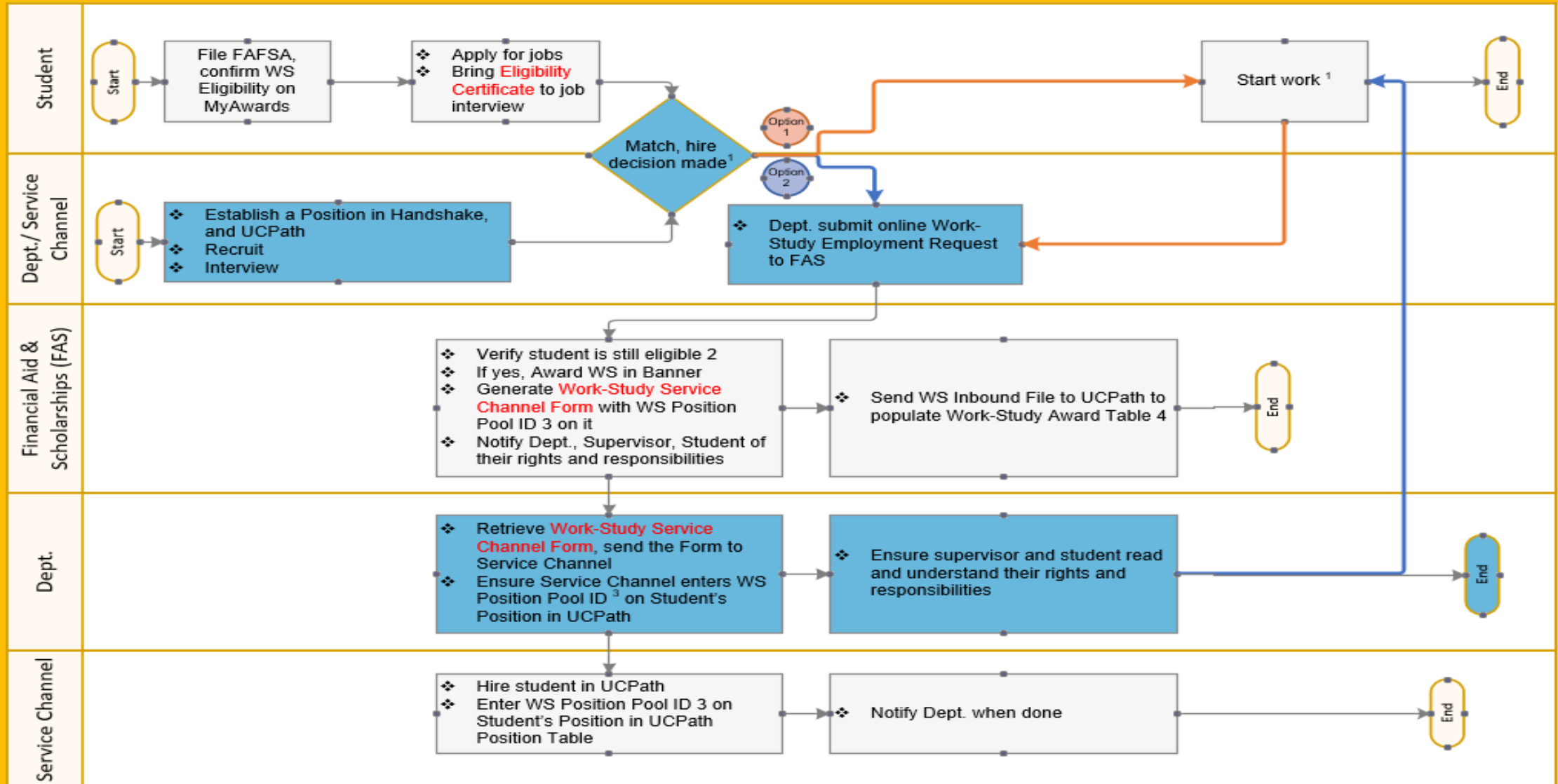
- **DON'T:**

- 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.

[https://docs.google.com/document/d/e/2PACX-1vRHUO0EE87qiB\\_AS7a1EDXzamhyK9nJNEL\\_xuus3fD5PLQdjMkEepmBo3BbmfixYXIhKWnz0oxHM7J/pub](https://docs.google.com/document/d/e/2PACX-1vRHUO0EE87qiB_AS7a1EDXzamhyK9nJNEL_xuus3fD5PLQdjMkEepmBo3BbmfixYXIhKWnz0oxHM7J/pub)



# Work-Study Student Hiring Process - UG



# 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 [Handshake](#). 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 [Handshake](#), recruit and interview.
- ☐ Ask the student for their Work-Study Eligibility Certificate.
- ☐ Review [Work-Study website](#) 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.

# Work-Study Employment Request




- Work-Study Manager Review
  - 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



# Work-Study Employment Request Form

## Work-Study Employment Request Form - Undergraduate Students

 Instructions

### Department Information

Name

Lisa Feldmann

Email

lafeldmann@ucdavis.edu

Phone

(530) 752-2294

Hiring Department

FINANCIAL AID OFFICE

Aid Year

2021-2022 - (July 2021 - June 2022)



The 2022-2023 aid year will be available starting June 1st.

Student(s)

Add Student:

123456789


Go!

 Upload Excel List

 Submit

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FINANCIAL AID OFFICE

Aid Year

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Student(s)

Add Student:

(Student ID)

Go!

Update All Columns ▾

 Upload Excel List

Name

Student ID

Email

Supervisor

Title Code

Pay Rate

[REDACTED]

[REDACTED]

[REDACTED]@ucdavis.edu

[REDACTED] <kayala@ucdavis.edu>

Clear

004921 - STUDENT 2

\$ 15.00



 Submit

# Work-Study Employment Request Form

Award Fund Code:

WORK

FIS Account:

9023672

Award:

\$3,500

Work-Study UCPATH Position Pool ID:

F

Effective Eligibility Date:

7/11/2021

\* 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.

\* The award amount reflects the student's total work-study gross earnings, including the employer's share.

Funding is subject to change based on 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.

ACADEMIC AWARD PERIOD: **JULY 01, 2021 - JUNE 30, 2022**

THE WORK-STUDY AWARD LISTED ABOVE:

- Supersedes any previously assigned eligibility.
- Is the maximum amount of work - study gross earnings that may be earned by the student during this period.
- May include prior earnings for this period if it is a "revised" award.

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.



# Work-Study Employment Request Form


## 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) will 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 (7/21/2021 8:15 AM by [REDACTED])

 [Work-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.

## WORKFLOW

Completed

### Submit



Submitted on 6/21/2021 5:10 PM  
by [REDACTED]



### Work-Study Coordinator Review



Student Experience & Processing and  
Awards Unit (SEPAU)  
Completed on 6/21/2021 5:14 PM  
by Lisa Feldmann



### Departmental Review



Completed on 7/21/2021 8:15 AM  
by [REDACTED]

# Work-Study Service Channel Form

**UC DAVIS**  
**FINANCIAL AID  
AND SCHOLARSHIPS**

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

UC DAVIS Undergraduate  
2021-2022 WORK-STUDY EMPLOYMENT ELIGIBILITY FORM

## ELIGIBILITY PERIOD

Effective Eligibility Date: 1/12/2022

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, 2021 - June 30, 2022

## AWARD INFORMATION

Student Name: [REDACTED] Student ID: [REDACTED]

Employee ID: 105 [REDACTED] Department: STUDENT DISABILITY CENTER

Title Code: 004920 - STUDENT 3 Pay Rate: 15.25

Work-Study Account : 9023675 Award Amount\*: \$3,500

**Work-Study UCPATH Position Pool ID (PPID)\*\*: W**

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

# From “SCC Form” to UCPath Position Table

Description	Specific Information	UC Position Data	Budget and Incumbents	Supporting Documents
<b>Position Information</b> Find   V				
Position Number 408 [REDACTED]				
Headcount Status Filled				
Current Head Count 1 out of 1				
Effective Date 12/27/2021				
Status Active				
Reason COR Correction SalPlan, Grade, Etc				
Action Date 01/03/2022				
Position Status Approved				
Status Date 09/01/2021				
<input type="checkbox"/> Key Position				
<b>Job Information</b>				
Business Unit DVCMP UC Davis Campus				
Job Code 004920 STDT 3				
Reg/Temp Not Applicable				
Full/Part Time Variable				
Regular Shift Not Applicable				
Union Code 99 No				
Title STDT 3				
Short Title STDT 3				
<b>Work Location</b>				
Reg Region USA United States				
Department 040018 L&S DEANS-MKTG & COMM				
Company UCS Un				
Location SOCSCI&HUM SSH				
Reports To 403 [REDACTED] [REDACTED]				
Dot-Line				
Supervisor Lvl				

Description	Specific Information	UC Position Data	Budget and Incumbents	Supporting Documents
Position Number 408 [REDACTED]				
Headcount Status Filled				
<b>Specific Information</b>				
Effective Date 12/27/2021				
Max Head Count 1				
Mail Drop ID				
Work Phone				
Health Certificate				
Signature Authority				
<b>Education and Government</b>				
Position Pool ID F DVFEDUG				
Pre-Encumbrance Indicator No Encumbrance				
Encumber Salary Option Salary Grade Minimum				
Classified Indicator Professional & Support Staff				



# 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](mailto: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

## UC DAVIS FINANCIAL AID AND SCHOLARSHIPS

Report 1

Business Unit	School/Division	Department Code
DVCMP - UC Davis Campus DVMED - UC Davis Medical Center	01 - AGRICULTURE 08 - ENGINEERING 16 - LS: ADMIN 17 - LS: HACS 18 - LS: MATH/PHY SCI 19 - LS: SOC SCI 22 - BIOLOGICAL SCIENCES 29 - MANAGEMENT 36 - LAW 43 - UC Davis School of Medicine 44 - UC Davis School of Nursing	030000 - AGR & ENV SCI DEANS OFFICE 030001 - AG PLANT BIOLOGY 030003 - PLANT SCIENCES 030005 - AG MICROBIOLOGY & MOLEC GENE 030008 - SCIENCE AND SOCIETY PROGRAM 030009 - UC CALFRESH NUTRITION ED PROG 030010 - AG & RESOURCE ECONOMICS 030012 - CAES DISSC 030020 - BIOLOGICAL & AG ENGINEERING 030030 - AG PLANT SCI ADVISING CENTER 030045 - ANIMAL SCIENCE

Employee	
Keywords: Type one or more keywords separated by spaces.	
<input type="text"/>	<input type="button" value="Search"/>
Options	
Results:	<input type="button" value="Insert"/> <input type="button" value="Remove"/>

Fiscal Year	WS Position Pool ID
2122 2201 2202 2203 2204	A - WS - Federal Undergrad 2nd Job A - WS-Federal Undergrad2 B - WS-Federal Undergrad 2nd Job2 C - WS - Federal Graduate2 C - WS - Federal Undergrad D - WS - Federal Undergrad 2nd Job E - WS - Law Community Service2 E - WS - Federal Graduate F - WS - Jack Liter Intl Undergrad F - WS - Federal Undergrad G - WS - University Undergrad

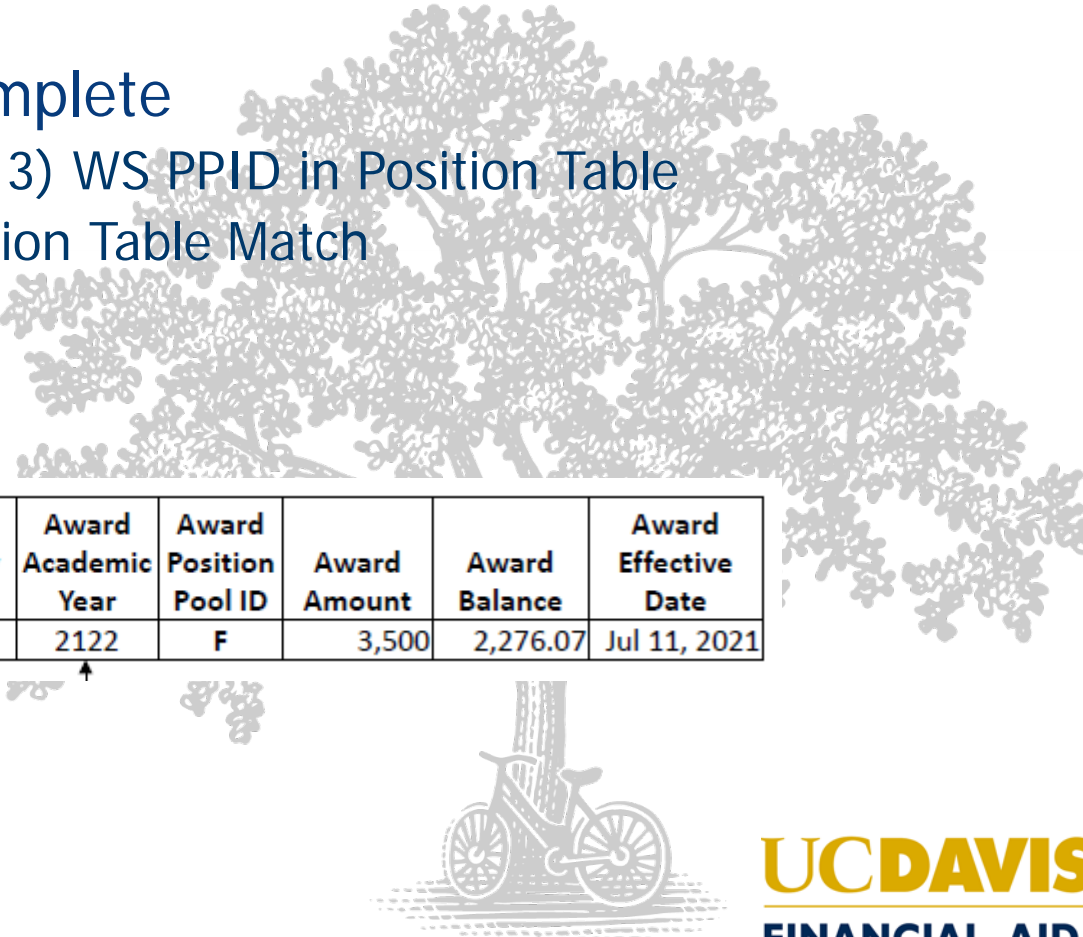
Cancel

< Back

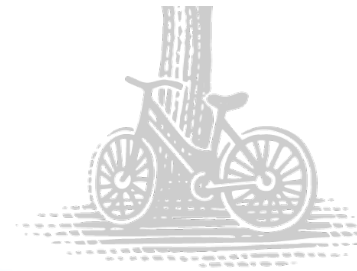
Submit

# 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



Department Code	Employee ID	Employee Record	Position Number	Position Pool ID	HR Status	Hourly Rate	Award Academic Year	Award Position Pool ID	Award Amount	Award Balance	Award Effective Date
030045	12345678	1	40780000	F	A	15.25	2122	F	3,500	2,276.07	Jul 11, 2021



# 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

Employee \*Required

Keywords:  
Type one or more keywords separated by spaces.  
1052

Options

Results:  
1052

[Select all](#) [Deselect all](#) [Select all](#) [Deselect all](#)

Fiscal Year	WS Position Pool ID
2122	A - WS - Federal Undergrad 2nd Job
2201	A - WS-Federal Undergrad2
2202	B - WS-Federal Undergrad 2nd Job2
2203	C - WS - Federal Graduate2
2204	C - WS - Federal Undergrad
	D - WS - Federal Undergrad 2nd Job
	E - WS - Law Community Service2
	E - WS - Federal Graduate
	F - WS - Jack Liter Intl Undergrad
	F - WS - Federal Undergrad
	G - WS - University Undergrad

[Select all](#) [Deselect all](#) [Select all](#) [Deselect all](#)

Cancel

< Back

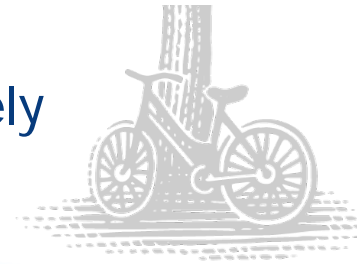
Submit

# 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
10486372	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

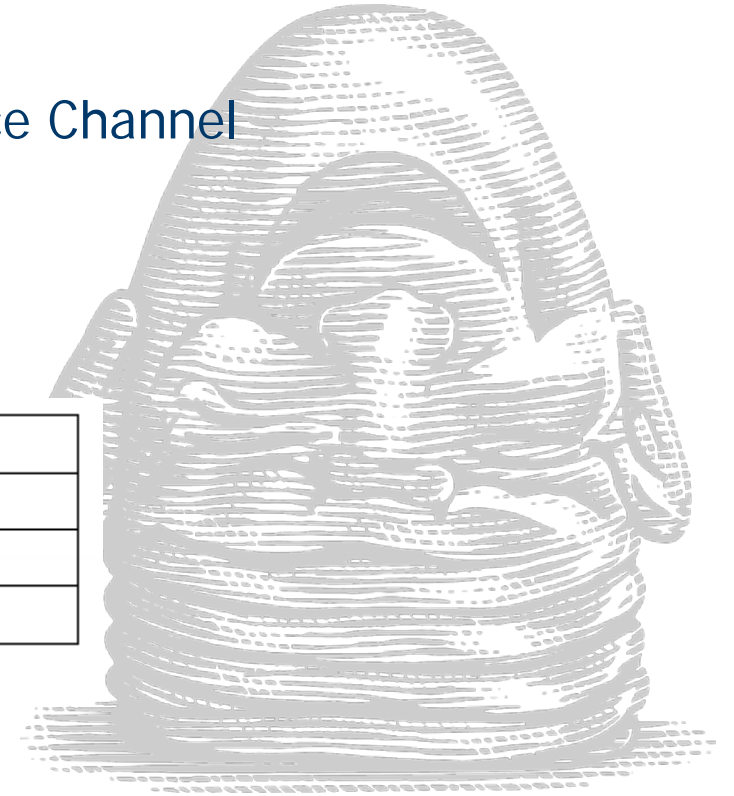




# Ensure a Successful Work-Study Setup

- 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
- How Did We Do in 2019-20 and 2020-21?

	2019-20	2020-21
Students with Approved WS Award	1,236	1,085
Student Earnings Successfully Paid by WS	1,052	908
Success Rate	85%	84%

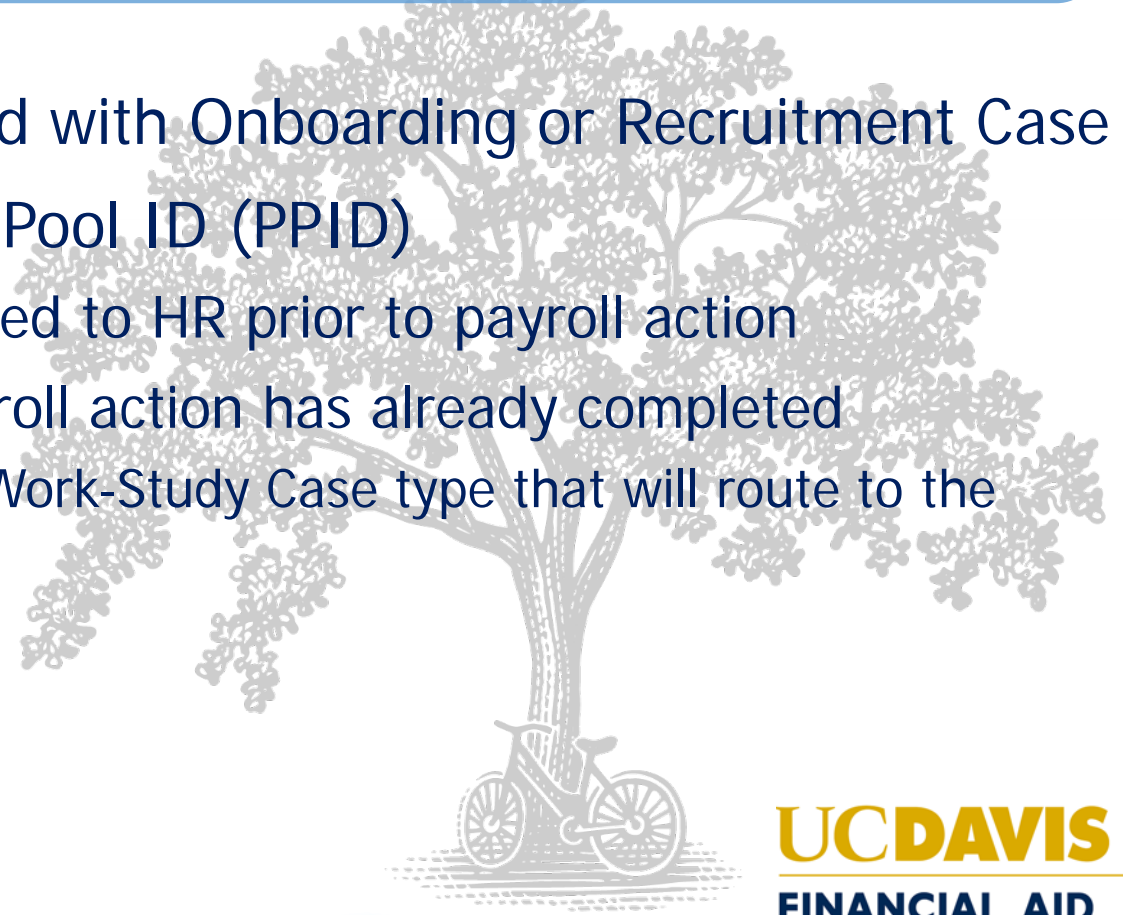


# Review Work-Study Split Cognos Report 339

Account	Sub Account	Expense Type	Project	Doc Number	Employee ID	UC Earn End Date	Earn Code	Altacct	FTE	UC Pct Total Pay	Monetary Amount
9023672	WSTDY	SALARY	WKSTUDYUCP	PJ00001726	10200000	Aug 21, 2021	REG	W	0.2	75%	804.75
DEPTACT	----	SALARY	-----	PJ00001726	10200000	Aug 21, 2021	REG	D	0.2	25%	268.25
7277771	----	FRINGE	WKSTUDYUCP	PJ00001726	10200000	Aug 21, 2021	---	W	0.2	0%	12.88
DEPTACT	----	FRINGE	-----	PJ00001726	10200000	Aug 21, 2021	---	D	0.2	0%	4.29
9023672	WSTDY	SALARY	WKSTUDYUCP	PJ00001756	10200000	Sep 4, 2021	REG	P	0.2	36%	199.87
DEPTACT	----	SALARY	-----	PJ00001756	10200000	Sep 4, 2021	REG	S	0.2	12%	66.63
7277771	----	FRINGE	WKSTUDYUCP	PJ00001756	10200000	Sep 4, 2021	---	P	0.2	0%	3.20
DEPTACT	----	FRINGE	-----	PJ00001756	10200000	Sep 4, 2021	---	S	0.2	0%	1.07
DEPTACT	----	SALARY	-----	PJ00001756	10200000	Sep 4, 2021	REG	Y	0.2	52%	284.50
DEPTACT	----	FRINGE	-----	PJ00001756	10200000	Sep 4, 2021	---	Y	0.2	0%	4.55
DEPTACT	----	SALARY	-----	PJ00001774	10200000	Sep 18, 2021	REG	X	0.2	87%	601.75
DEPTACT	----	FRINGE	-----	PJ00001774	10200000	Sep 18, 2021	---	X	0.2	0%	9.63
DEPTACT	----	SALARY	-----	PJ00001774	10200000	Sep 18, 2021	HLN		0.2	13%	87
DEPTACT	----	FRINGE	-----	PJ00001774	10200000	Sep 18, 2021	---		0.2	0%	1.39

# Shared Service Organization HRC Work-Study Process

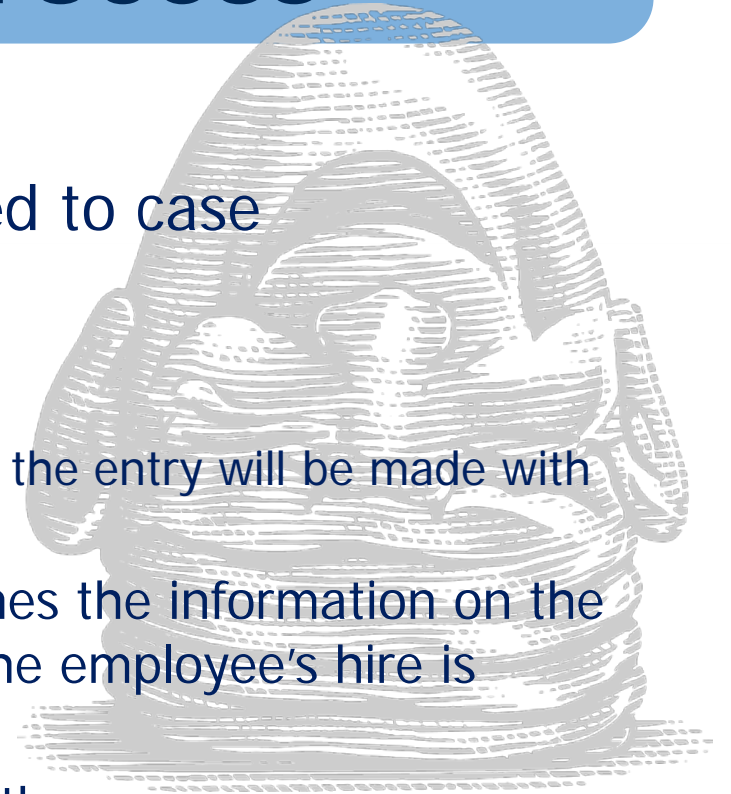
- Work-Study Document is Submitted with Onboarding or Recruitment Case
- Update Position Control – Position Pool ID (PPID)
  - Update Vacant Position if submitted to HR prior to payroll action
  - If attached to closed case or payroll action has already completed
    - Department will need to submit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

Timesheet for [REDACTED] (104 [REDACTED])  
Pay Period 01/09/22 - 01/22/22 (81)  
UC DAVIS BOOKSTORE / STD 2 / **CASHIER WS**  
Position Number: 407 [REDACTED] [View PDF](#) Status: COMPLETED

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9	10	11 Work Hrs 2.75 hrs	12	13	14	15
16	17 M.L. King Jr. Holiday	18	19	20	21	22

**Electronic Signatures**  
Employee/Submitter [REDACTED] 01/24/22 07:58am  
Supervisor [REDACTED] 01/24/22 09:23am  
**Timesheet In/Out Details**  
01/11 - 12:02pm - 2:46pm(Work Hrs)

**Final Hours Submitted**  
REG=2.75

	Week 1	Week 2
Work Hrs	2.75	0.00
<b>TOTAL</b>	<b>2.75</b>	<b>0.00</b>

**Timesheet Totals**  
Work Hrs 2.75  
2.75

Once submitted for approval, a copy will go to your supervisor. If you have any questions, please contact your Payroll Coordinator for assistance.





# Central Payroll/UCPath – Direct Retro

- 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 DR 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”

# Direct Retro – Retroactively Change Department Funding

- Example #1 – Single Account

**Old Data**

Personalize | Find | First 1-2 of 2 Last

Earning details | Job details | Old Accounting Period

Empl Rcd#	Earnings Code	Combination Code	Chart	Chart-Account	Org	Fund	Project	Sub Account	Budget Sub	Alt Acct	OTC Indicator	Earnings
1	0 REG	000222542	3	3-9023654	3-FWSP	36C03	WKSTUDYUCP	WSTDY	02	W		\$99.00
2	0 REG	000222555	3	3-6800508	3-FAOA	19900			02	D		\$33.00

**New Data**

Personalize | Find | First 1-2 of 2 Last

Earning details | Job Details | Posting Accounting Period

Empl Rcd#	Earnings Code	New Combo Code	Chart	Chart-Account	Org	Fund	Project	Sub Account	Budget Sub	Alt Acct	OTC Indicator	New Earnings Amount	Apply/Remove Work Study	
1	0 REG	000229689	3	3-6820290	3-FAOA	20290			02			\$99.00	Apply WS	
2	0 REG	000229689	3	3-6820290	3-FAOA	20290			02			\$33.00	Apply WS	

Check Balance

Total: \$132.00  
Balance: \$0.00

Direct Retro Salary Cap/MCOP Funding Worksheet

# Direct Retro – Retroactively Change Department Funding

- Example #2 – Multiple Accounts

Company: UCS      Pay Group: 3ST      Pay Begin Date: 01/09/2022      Pay End Date: 01/22/2022

Pay Run ID: 220122B1X      ☐ Off Cycle      **Earnings Distribution**

---

**Old Data** Personalize | Find | [?] | [Grid] First 1-2 of 2 Last

**Earning details** | Job details | Old Accounting Period [Menu]

Empl Rcd#	Earnings Code	Combination Code	Chart	Chart-Account	Org	Fund	Project	Sub Account	Budget Sub	Alt Acct	OTC Indicator	Earnings
1	0 REG	001060322	3	3-9023672	3-FWSP	39D02	WKSTUDYUCP	WSTDY	02	W		\$160.13
2	0 REG	001138017	3	3-6800508	3-FAOA	99100			02	D		\$53.37

---

**New Data** Personalize | Find | [?] | [Grid] First 1-3 of 3 Last

**Earning details** | Job Details | Posting Accounting Period [Menu]

Empl Rcd#	Earnings Code	New Combo Code	Chart	Chart-Account	Org	Fund	Project	Sub Account	Budget Sub	Alt Acct	OTC Indicator	New Earnings Amount	Apply/Remove Work Study
1	0 REG	001060322	3	3-6800501	3-FAOA	75040			02			85.4	Apply WS ▾ +
2	0 REG	001138017	3	3-6820290	3-FAOA	99100			02			85.4	Apply WS ▾ +
3	0 REG		3	3-6819973	3-FAOA	19973			02			42.7	Apply WS ▾ +

**Check Balance**      **Total:** \$213.50      **Balance:** \$0.00

Direct Retro Salary Cap/MCOP Funding Worksheet

# Direct Retro – Retroactively Apply Work-Study

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

Company: UCS      Pay Group: 3ST      Pay Begin Date: 09/19/2021      Pay End Date: 10/02/2021

Pay Run ID: 211002B1X      ☐ Off Cycle      **Earnings Distribution**

---

**Old Data** Personalize | Find | [Grid Icon] | [Print Icon] First 1-2 of 2 Last

**Earning details** | Job details | Old Accounting Period [Calendar Icon]

Empl Rcd#	Earnings Code	Combination Code	Chart	Chart-Account	Org	Fund	Project	Sub Account	Budget Sub	Alt Acct	OTC Indicator	Earnings
1	0 REG	000739599	3	3-COSAF73	3-VCSS	73305		GENRL	02	X		\$71.25
2	0 REG	000739599	3	3-COSAF73	3-VCSS	73305		GENRL	02	X		\$21.38

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**New Data** Personalize | Find | [Grid Icon] | [Print Icon] First 1-2 of 2 Last

**Earning details** | Job Details | Posting Accounting Period [Calendar Icon]

Empl Rcd#	Earnings Code	New Combo Code	Chart	Chart-Account	Org	Fund	Project	Sub Account	Budget Sub	Alt Acct	OTC Indicator	New Earnings Amount	Apply/Remove WorkStudy
1	0 REG	000165685	3	3-COSAF73	3-VCSS	73305		GENRL	02			\$71.25	Apply WS
2	0 REG	000165685	3	3-COSAF73	3-VCSS	73305		GENRL	02			\$21.38	Apply WS

**Check Balance**

Total: \$92.63

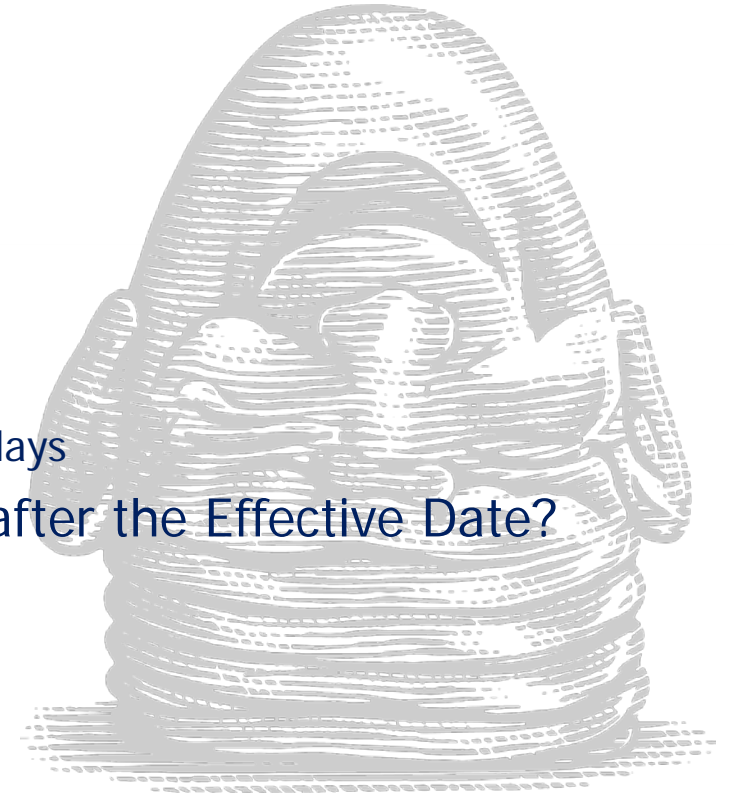
Balance: \$0.00

Direct Retro Salary Cap/MCOP Funding Worksheet



# Direct Retro – Things to Pay Attention to

- Process in a Timely Manner
  - FAQ: Is there a time limit for DR action?
    - Best practice: process DR 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 DR 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

Account	Sub Account	Expense Type	Project	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



# Work-Study Timesheet

- Must Maintain Complete and Accurate Timesheets
  - Must be Certified by the Supervisor
  - FAS May Perform Audit



# Q & A



**UCDAVIS**  
FINANCIAL AID  
AND SCHOLARSHIPS

# We are here to help you!

## Financial Aid and Scholarship

Work-Study Manager – Lisa Feldmann

Email: [workstudy@ucdavis.edu](mailto:workstudy@ucdavis.edu)

Phone: 530-752-2294

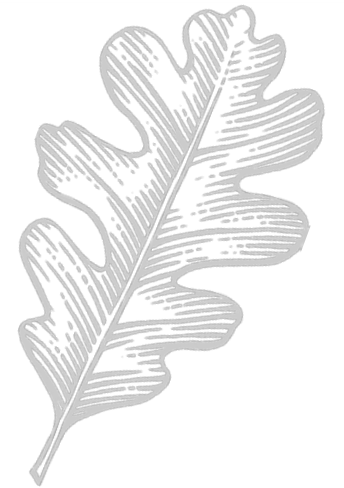
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AND SCHOLARSHIPS**



# Central Payroll/UCPath Resources

- <https://ucpath.ucdavis.edu/learning-paths/finance-users>
  - Expand eLearning & Job Aids
  - Scroll down to Work-Study Guide for UCPath
- Contact UCPath Help Desk at UCD at [ucpath@ucdavis.edu](mailto:ucpath@ucdavis.edu)
  - Submit questions regarding Direct Retro transactions
  - To request Cognos Access visit <http://ucpath.ucdavis.edu/security>





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## FINANCIAL AID AND SCHOLARSHIPS

Thank you.

[financialaid.ucdavis.edu](https://financialaid.ucdavis.edu)

