3.0 Work study Reports

3.1 Overview
Work study reports center around students who have accepted work study as a part of their financial aid package. The Student Appointment/Payroll System allows for the entry of the award, payment to the student for hours worked, and the distribution of salary & fringe to the appropriate funding source, which includes both the federal and department share of work study charges.

Several reports are available to assist you in monitoring the work study process. These include:
- Work study Balance Control
- Department Work study Award

3.2 Work study Balance Control
This report is produced during each payroll edit. Its purpose is to provide pre-calc payment information for students receiving work study.

The estimated amount the student will be paid during the next calc is compared to the remaining work study balance. If the paid amount exceeds the work study balance, an “over balance” indicator is set. Using this information will allow you to make necessary award adjustments before the payroll is processed instead of doing salary cash transfers after the payroll.

If the work study award amount has been distributed down to the appointment level, the comparison will also include the estimated amount that appointment will be paid and the appointment work study balance.

The Work study Balance Control Report can only be run at the work study awarding campus level.

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### Workstudy Balance Control

#### Data Selection

Workstudy Awarding Campus: [A]

#### Additional Data Selection

- Records to be shown:
  - [ ] All records
  - [x] Only records marked over balance

#### Sort Order (Alpha Within)

Output Type:

- PDF - View/Print/Save

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- Data Selection
  - Work study Awarding Campus: work study awarding campus code (N for Whitewater)
- Additional Data Selection
  - Records to be shown: select either all records or only records over balance
    - If “all records” is selected, all payments for students with work study award will be displayed.
    - If “only records over balance” is selected, only those payments where the payment amount exceeds the remaining work study balance (whether award or appointment balance) will be displayed.
Person Name
SSN
Person ID
Person Work study Details
  • Awarding Period
  • Award Amount
  • Award Balance
  • Total Payment
  • Over Balance

Appointment Details
  • Student Job Type
  • Appt ID
  • Appt Major Dept
  • Appt Amount
  • Appt Balance
  • Total Payment
  • Over Balance

Work study award period to which the payment is to be charged
Amount of the work study award
Current work study award balance
Estimated amount of all payments for this student
Indicator as to whether or not there are sufficient award dollars remaining to cover the payment; ‘X’ indicates that there are not sufficient dollars (payment amount exceeding the award balance will be charged to departmental funds)
Type of student help job that determines the federal share percentage
Amount of the work study award distributed to this appointment (will be blank if the award is not distributed to the appointment level)
Current work study balance for this appointment
Estimated amount of all payments for this appointment
Indicator as to whether or not there are sufficient award dollars at the appointment level to cover the payment; ‘X’ indicates that there are insufficient funds left in the work study award.
3.3 **Department Work study Award**

This report is run after the payroll has been processed and the work study balances updated.

The report can be run at any organizational (UDDS) level. Award and payment data displayed is limited to only those students employed within that organizational unit.

<table>
<thead>
<tr>
<th>Data Selection</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Calc:</strong></td>
<td>JUN B STUDENT (06/06/2004 - 06/19/2004)</td>
</tr>
<tr>
<td><strong>UDDS:</strong></td>
<td>A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Data Selection</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Flag persons where the remaining balance is at or less than the entered percent:</td>
<td></td>
</tr>
<tr>
<td>Percent value to flag awards</td>
<td></td>
</tr>
<tr>
<td>Show only flagged awards?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Output Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PDF - View/Print/Save</td>
<td></td>
</tr>
</tbody>
</table>

- **Data Selection**
  - **Calc:** Student payroll calc and corresponding pay period dates
  - **UDDS:** Full or partial UDDS; work study information for students with appointments whose appointment major department matches the value input will display

- **Additional Data Selection:** (optional):
  - **Percent value to flag awards:** “Mark” awards where the percent used equals or exceeds the value input
  - **Show only flagged awards:** Show only those awards that were “marked” with the specified percent
At or Above Specified %

Indicator for awards where the work study used equals or exceeds the percent value input. If it meets the percent criteria input, XX is displayed.

Not available with Excel or Download format.

<table>
<thead>
<tr>
<th>Person Name</th>
<th>SSN</th>
<th>Person ID</th>
<th>Academic Period</th>
<th>Amount</th>
<th>Balance</th>
<th>Workstudy Eligible Appts</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABANONU, CHINEMEREM FRED</td>
<td>340553</td>
<td></td>
<td>2004 SUMMER SESSION</td>
<td>500.00</td>
<td>75.00</td>
<td>1</td>
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<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Appt ID</td>
<td>Major Dept</td>
<td>Student Job Type</td>
<td>Appt Amount</td>
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<tr>
<td></td>
<td>810524</td>
<td>A347500</td>
<td>ON-CAMPUS</td>
<td>252.39</td>
<td>168.25</td>
<td>.00</td>
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</table>

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<thead>
<tr>
<th>Person Name</th>
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<th>Amount</th>
<th>Balance</th>
<th>Workstudy Eligible Appts</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABLER, CHRISTINE MARIE</td>
<td>414060</td>
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<td>2004 SUMMER SESSION</td>
<td>1500.00</td>
<td>847.50</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Appt ID</td>
<td>Major Dept</td>
<td>Student Job Type</td>
<td>Appt Amount</td>
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<td></td>
<td>857760</td>
<td>A435100</td>
<td>ON-CAMPUS</td>
<td>140.40</td>
<td>93.60</td>
<td>.00</td>
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<thead>
<tr>
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<th>SSN</th>
<th>Person ID</th>
<th>Academic Period</th>
<th>Amount</th>
<th>Balance</th>
<th>Workstudy Eligible Appts</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAMETZ, AMANDA MARIE</td>
<td>413642</td>
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<td>2004 SUMMER SESSION</td>
<td>1500.00</td>
<td>1345.00</td>
<td>1</td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Appt ID</td>
<td>Major Dept</td>
<td>Student Job Type</td>
<td>Appt Amount</td>
</tr>
</tbody>
</table>

- **At or Above Specified %**
  - At or Above Specified %
  - Person Name
  - SSN
  - Person ID
  - Person Work study Details
    - **Academic Period**
      - Work study award period to which the payment is to be charged
    - **Award Amount**
      - Amount of the work study award
    - **Award Balance**
      - Current work study award balance
    - **Work study Eligible Appts**
      - Number of appointments this student has that are eligible to receive work study funds
  - **Appointment Details**
    - **Appt ID**
    - **Major Dept**
    - **Student Job Type**
      - Type of student help job that determines the federal share percentage
    - **Appt Amount**
      - Amount of the work study award distributed to this appointment (will be blank if the award is not distributed to the appointment level)
    - **Appt Balance**
      - Current work study balance for this appointment
    - **WS Paid**
      - Calc payment amount distributed to work study for this appointment
    - **Total Paid**
      - Calc payment amount for this appointment