

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.

Workstudy Balance Control		
Data Selection		
Workstudy Awarding Campus: <input type="text" value="A"/>		
Additional Data Selection		
Records to be shown:		
<input checked="" type="radio"/> All records		
<input type="radio"/> Only records marked over balance		
Sort Order (Alpha Within)	Output Type	
	<input type="text" value="PDF - View/Print/Save"/>	<input type="button" value="Create Report"/>

- **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.

RP112

University of Wisconsin System - Workstudy Balance Control Report

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Data Accurate as of 06/24/2004 19:19:53

Page 1 of 19

Calc Number: 200407200

Workstudy Awarding Institution: A

Name	SSN	Person ID	Awarding Period	Award Amount	Award Balance	Total Payment	Over Balance
ABANONU, CHINEMEREM FRED		340553	SUMMER SESSION 2004	500.00	500.00	420.66	
	Student Job Type	Appt ID	Appt Major Dept	Appt Amount	Appt Balance	Total Payment	
	ON-CAMPUS	810524	A347500	N/A	N/A	420.66	
Name	SSN	Person ID	Awarding Period	Award Amount	Award Balance	Total Payment	Over Balance
ABLER, CHRISTINE MARIE		414060	SUMMER SESSION 2004	1,500.00	1,081.50	234.00	
	Student Job Type	Appt ID	Appt Major Dept	Appt Amount	Appt Balance	Total Payment	
	ON-CAMPUS	857760	A485100	N/A	N/A	234.00	
Name	SSN	Person ID	Awarding Period	Award Amount	Award Balance	Total Payment	Over Balance
AGUIRRE, ALICIA M		392818	SUMMER SESSION 2004	1,500.00	1,161.50	299.25	
	Student Job Type	Appt ID	Appt Major Dept	Appt Amount	Appt Balance	Total Payment	
	ON-CAMPUS	863884	A177500	N/A	N/A	299.25	

➤ **Person Name**➤ **SSN**➤ **Person ID**➤ **Person Work study Details**

- **Awarding 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
- **Total Payment** Estimated amount of all payments for this student
- **Over Balance** 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)

➤ **Appointment Details**

- **Student Job Type** Type of student help job that determines the federal share percentage
- **Appt ID**
- **Appt Major Dept**
- **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
- **Total Payment** Estimated amount of all payments for this appointment
- **Over Balance** 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.

Department Workstudy Award		
Data Selection		
Calc:	<input type="text" value="JUN B STUDENT (06/06/2004 - 06/19/2004)"/>	UDDS: <input type="text" value="A"/>
Additional Data Selection		
Flag persons where the remaining balance is at or less than the entered percent:		
Percent value to flag awards	<input type="text"/>	
Show only flagged awards?	<input type="checkbox"/>	
Output Type		
<input type="text" value="PDF - View/Print/Save"/>		<input type="button" value="Create Report"/>

➤ **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

Data Accurate As Of 06/24/2004 20:48:18

Major Department: A UNIVERSITY OF WISCONSIN - MADISON

Calc Name: JUN B STUDENT

Pay Period Dates: 06/06/2004 - 06/19/2004

Percent to flag records:

Show only flagged awards: No

At or above specified %	Person Name		SSN	Person ID	Academic Period		Amount	Balance	Workstudy Eligible Appts
	ABANONU, CHINEMEREM FRED			340553	2004 SUMMER SESSION		500.00	79.36	1
	Appt ID	Major Dept	Student Job Type	Appt Amount	Appt Balance	WS Fed	WS Dept	Non WS	Total Paid
	810524	A347500	ON-CAMPUS			252.39	168.25	.00	420.64
At or above specified %	Person Name		SSN	Person ID	Academic Period		Amount	Balance	Workstudy Eligible Appts
	ABLER, CHRISTINE MARIE			414060	2004 SUMMER SESSION		1,500.00	847.50	1
	Appt ID	Major Dept	Student Job Type	Appt Amount	Appt Balance	WS Fed	WS Dept	Non WS	Total Paid
	857760	A485100	ON-CAMPUS			140.40	93.60	.00	234.00
At or above specified %	Person Name		SSN	Person ID	Academic Period		Amount	Balance	Workstudy Eligible Appts
	ADAMETZ, AMANDA MARIE			413642	2004 SUMMER SESSION		1,500.00	1,345.00	1
	Appt ID	Major Dept	Student Job Type	Appt Amount	Appt Balance	WS Fed	WS Dept	Non WS	Total Paid

➤ **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.

➤ **Person Name**➤ **SSN**➤ **Person ID**➤ **Person Work study Details**

- **Academic Period**
- **Award Amount**
- **Award Balance**
- **Work study Eligible Appts**

Work study award period to which the payment is to be charged

Amount of the work study award

Current work study award balance

Number of appointments this student has that are eligible to receive work study funds

➤ **Appointment Details**

- **Appt ID**
- **Major Dept**
- **Student Job Type**
- **Appt Amount**

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)

- **Appt Balance**
- **WS Paid**

Current work study balance for this appointment

Calc payment amount distributed to work study for this appointment

- **Total Paid**

Calc payment amount for this appointment