#### Work-Study Supervisor Training

Academic Year 2018-19

Office of Scholarships & Student Aid University of North Carolina at Chapel Hill



#### Training Summary

- Process Overview
- Federal Work-Study Program Overview
- Administration Guidelines
- WS Student/Supervisor Responsibilities
- Posting and Hiring
- Payroll, Time, & Wages
- Best Practices & Common Errors
- Next Steps





## Process Overview

A general timeline of important events for students, supervisors, & the WS Team

#### Student Overview

- December-July
  - Financial aid packages received and accepted
- August 1
  - Students gains access to system and begin to apply/interview for positions
- August 21
  - Students can begin work after completing necessary onboarding processes with HR Representative and Supervisor
- December 14
  - Last day of Fall finals; Fall-only students cease work after this day
- January 9
  - Spring classes commence; Spring-only students begin work
- May 7
  - Last day of Spring finals; Fall/Spring student cease work after this day



#### Supervisor Overview: May-August

- End of May/Early June
  - Supervisors are notified of access to upgraded JobX site via listserv
  - Supervisors complete WS & JobX training modules, quiz, and begin postings positions on JobX
    - Jobs submitted before 7/1 are posted by system opening (8/1)
    - Jobs submitted on or after 7/1 will be posted as soon as possible but may not be available to students when the system opens
  - If jobs are returned for correction, updates are made before the job is resubmitted for review
- August 1<sup>st</sup>
  - Supervisors begin interview and hiring processes
- Augusts 21st
  - Supervisors confirm that students have completed all requirements (listed below) & allow students to begin work after developing a work schedule
    - Completion of work eligibility process (I-9)
    - Completion of payroll process (W-4, NC-4, Direct Deposit)
    - Completion of WS Training (screenshot of 100% pass on Student WS Quiz)



#### Supervisor Overview: September-May

- Fall & Spring Ongoing
  - Monitor student work hours & performance
  - Provide training, guidance, & communication to students
  - Correspond with the FWS Team regarding any issues
  - Complete evaluations at end of semester (required) and mid-semester (recommended)

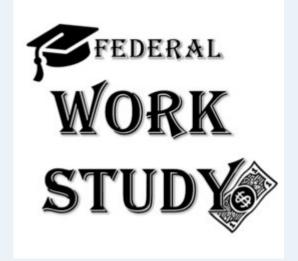
#### • Fall

- Fall-only students cease work on last day of Fall exams for semester break (December 14<sup>th</sup>)
- Students employed for Fall & Spring attending Spring classes can continue to work over the break

#### Spring

- Spring-only students begin work on 1st day of Spring classes (January 9th)
- Fall/Spring students cease work on last day of Spring exams for semester break (May 7<sup>th</sup>)





# Work-Study Program Overview

A brief look at the purpose, policies, and practices of the WS programs

- FWS is a Title IV financial aid program that provides part-time employment opportunities to students who demonstrate financial need
- Students must apply for FWS by submitting a Free Application for Federal Student Aid (FAFSA)
- Students are notified of their FWS eligibility as part of their year-specific financial aid package
- Only those students who have been awarded FWS may participate in FWS employment opportunities



- Employment can be on-campus (with offices, departments, professional schools, auxiliary services) or off-campus with approved non-profit community service agencies
- FWS is awarded on an annual basis, therefore, students must reapply and requalify every year
- FWS is supported by a combination of federal, state, and institutional funding and is subject to the regulations imposed by all three
- FWS helps defray the cost of higher education by enabling students to earn a steady paycheck and reduce/minimize loan debt



- All FWS positions <u>must</u> receive approval by the Office of Scholarships and Student Aid (OSSA) and be posted to the JobX database to ensure eligibility
- Positions are <u>required</u> to provide students with the opportunity to develop and expand professional skill sets and should correspond with academic, professional, and/or personal interests. Positions not offering these opportunities can not be approved for posting.



- Students are provided a maximum FWS award amount at the beginning of the year.
- FWS award amounts may be revised/reduced (due to a student receiving undeclared funding); hiring supervisors will be notified of any update via a weekly report
- Students are assigned an hourly wage rate set by the employer and are paid on a biweekly basis via direct deposit
- Notifications will be sent to the student & supervisor once the student nears their award limit
- Earnings in excess of the award amount become the responsibility of the hiring department



#### New for 18-19: Carolina Works (CW)

- CW provides a work-study opportunity to economically-disadvantaged students who do not meet the financial tests required to join the FWS program.
- Operates under the same structure as the FWS program, is overseen by the same staff, and uses the same tech systems.
- Supervisors who qualify for FWS can also participate in the CW program and can hire both sets of students for the same jobs.
- Students participation is mutually-exclusive between FWS and CW programs.



### Administration Guidelines

The important information needed to successfully operate the WS program



## Eligible Work Periods

Fall Semester	Work may begin on/after the first day of Fall classes and must stop on/before the last day of fall exams for Fall-only positions and students who are not enrolled in the Spring term.	
Winter Break	Work between semesters is ONLY ALLOWED for students enrolled in both Fall & Spring classes who are employed in a WS position for Fall & Spring	
Spring Semester	Work may start on the first day of spring classes for Spring-only students and must stop on/before the last day of spring exams for all Fall & Spring and Spring-only positions	
Summer Terms	Funding is NOT available for Summer FWS Students in a Carolina Works position who have not earned their full award and are enrolled for the Summer may work over the Summer term	
Student Breaks	Students may work during Fall Break and/or Spring Break provided a registered supervisor is present when student is working.	
University Holidays	Work IS NOT permitted during university holidays when departments are closed.  If the department is open and a registered WS Supervisor is present, students can work during university holidays on a voluntary basis.	



#### Eligible Supervisors

- Only full-time, permanent, faculty and staff, and approved nonprofit community service partners are eligible to serve as WS Supervisors
- Part-time employees, temporary employees, graduate students, and post-doctoral candidates are not eligible to be WS Supervisors
- It is highly advisable that employees without supervisory experience receive appropriate training and experience prior to serving as a WS Supervisor
- The primary supervisor must be registered on JobX as the position manager. An unlimited number of other supervisors can register as secondary supervisors.
- We strongly recommend having a one or more secondary supervisors for times when the primary supervisor is unavailable (e.g. ill, in meetings, on vacation).



### Eligible Jobs

- Students may hold only one WS position at a time, but may be simultaneously be employed in other non-FWS/CW employment
- Students are part-time employees and are not permitted to work more than 20 hours per week; the average position is for 10-12 hours per week
- Students are at-will employees. While uncommon, WS employees can be removed from, leave, or change positions during the academic year.



#### Eligible Work Duties

- Students are permitted to perform most job duties asked of non-WS employees, provided those duties are conducted on site and under supervision
- Students are not permitted to work remotely a designated work space/schedule is required
- Driving is not permissible as part of the job this includes state vehicles and personal vehicles
- Studying is strictly prohibited while on the job FWS is <u>not</u> a form of paid study time.
- Students are required to document their attendance, usually through a sign-in/sign-out protocol involving the TIM system



#### Termination

- During the 2017-18 academic year, only 2.5% of the 2,500 WS students were terminated (most due to graduation, studying abroad, or to pursue another position). Supervisors only needed to release 4 students for performance issues.
- Students who fail to meet job duties can be removed from their positions at the Supervisor's discretion
  - Documentation of the student's performance issue(s) and attempts to correct the issue(s) must occurs before students are terminated. This should involve meeting with the student to discuss expectations of the position and how the student is not meeting them as well as a performance improvement plan.
  - You must consulting with your departmental HR to ensure you have followed all required protocols for termination
  - The student must be notified in writing/email of their termination prior to any action being taken
- Supervisors terminating an employee should complete the termination request form, a link to which can be found on the Supervisor Resources Page in JobX.



- In compliance with federal regulations, OSSA has established a Job Classification System (JCS) to assist supervisors with determining equitable compensation based on job requirements
- The JCS differentiates among knowledge, skill level, ability, and also recognizes the wide array of job responsibilities
- The JCS permits supervisors to equitably classify students based on the level of complexity of the job and qualifications of the individual student across the entire WS program.



#### Pay Rates and Levels

• The table below contains the 2018-19 wage data. The following slides contain descriptions of the levels to assist you in job classification. WS staff will proof and (where necessary) update pay levels when reviewing positions.

Pay Level	Wage Range	Midpoint Wage
Level 1	\$7.25 - \$8.30	\$7.77
Level 2	\$8.30 - \$10.05	\$9.17
Level 3	\$10.05 - \$11.80	\$10.92
Level 4	\$11.80 - \$13.55	\$12.67

Supervisors designate the appropriate pay level when creating the position, but decide the appropriate Hourly Wage Rate upon hiring the WS employee based on the individual employee's qualifications.



- Level 1 (\$7.25-\$8.30):
  - No experience or previous training required
  - Positions that perform routine tasks with minimal responsibility
  - Where applicable, positions may require demonstrated ability to successfully interact with the public
  - Student employee works in a well-supervised setting and takes little-to-no independent action



- Level 2 (\$8.30-\$10.05):
  - Little or moderate experience, technical knowledge, or previous training is necessary
  - Special instruction may be necessary for some aspects of these positions.
  - Student employee must demonstrate the ability to learn new tasks and work independently with moderate or limited supervision



- Level 3 (\$10.05-\$11.80):
  - Moderate to substantial experience, technical knowledge, or previous training or certification is necessary
  - Student employee must possess a high level of competency with a specialized skill and readily demonstrate the use of independent judgment, decision-making ability, and/or the ability to work responsibly with little-to-no direct supervision
  - Previous work experience at a lower level within the same department may be required



#### • Level 4 (\$11.80-\$13.55):

- In addition to the qualifications and scope associated with Level 3, these positions require an individual who possesses substantial experience, advanced technical knowledge, and previous training/certification
- The student may be expected to manage technologies/equipment, research, analyses, publications, instruction, or other special projects or activities of significant scope
- The student may work with extremely limited supervision on a regular basis



#### Documentation for Hired Students

- Hired WS students must complete all required payroll forms with the hiring department's HR
  Representative/Shared Services Center & submit their employment verification form to their supervisor before they can begin working
- Departmental HR will enter the student's payroll information & set up the employee record in Connect Carolina
- Hired WS students are housed under the hiring department's number for payroll purposes but the WS account is used as the funding source
- Required payroll forms include: NC-4, W-4, Direct Payroll Deposit Authorization, and Electronic I-9 Employment Eligibility Verification
- Additionally, students must submit proof that they successfully completed WS Training to supervisors prior to beginning employment



#### Documentation of Time Worked

- All WS employees and supervisors are required to use the Kronos Time Information Management (TIM) System to track work hours where possible.
- WS students must complete Computer-Based TIM Training for on the first day of work
  - <a href="https://apps.fo.unc.edu/finance/training/tim-students-temps/">https://apps.fo.unc.edu/finance/training/tim-students-temps/</a>
- WS students ('employee' in TIM) & supervisors ('manager' in TIM) are required to approve work hours on a biweekly basis before the department TIM Administrator performs the final sign-off



#### Job X & Funding

- All WS positions <u>must</u> receive approval by the Office of Scholarships and Student Aid (OSSA) and be posted to the JobX database to ensure eligibility
- Students hired without authorization through JobX will have their earned wages retroactively charged to the hiring department.
- If a supervisor leaves their position or is no longer able to manage student workers, another supervisor must replace them in the JobX system.
- If a department has students working without a valid supervisor (who must registered as such in JobX), student earnings will be retroactively charged to the department.



#### Removal from program

Because the WS program is contingent on external funding, we are required to meet established guidelines in order to maintain eligibility. Failure to meet requirements by one supervisor can negatively impact program eligibility & funding for all participants. As such, OSSA will take any and all actions we believe necessary to ensure the continuation of the WS programs.

- Any supervisor that allows a student to earn more than their allotted award will be evaluated for suitability to continue participation in the WS program.
- Departments/supervisors with repeat violations may not be eligible to participate in the WS program in future aid years
- Any department that fails to meet their responsibility in paying for excess or unauthorized wages will be removed from the WS program





# WS Student/Supervisor Responsibilities

Documented duties for program participants

#### Student Responsibilities



WS students are professional employees, and are therefore responsible for conducting themselves in a professional manner, including:

- 1. Completing WS training and providing proof prior to beginning work
- 2. Providing all requested documentation to HR prior to beginning work
- 3. Establishing a work schedule
- 4. Reporting to work on time
- 5. Completing tasks as assigned
- 6. Notifying the supervisor of any absence or derivation from the established schedule due to illness, emergencies, or valid academic conflicts (e.g. office hours, advising appointments)
- 7. Working with a supervisor on mutually acceptable schedule revisions, if needed
- 8. Refraining from prohibited activities: studying on the job, misreporting hours worked, working over limits, failing to perform job duties, etc.
- 9. Refraining from discouraged activities: personal calls, texts, e-mails, & social media updates
- 10. Notifying the supervisor of any changes to their WS award





#### Supervisor Responsibilities

- Not discriminating on the basis of race, color, gender, national origin, age, religion, creed, disability, veteran status, sexual orientation, gender identity, and gender expression
- Verifying that any new WS job does not replace an existing position
- Ensuring the student is properly hired through JobX and processed with departmental HR
- Collecting & retaining certification that the studentemployee completed mandatory WS training
- Ensuring that WS students do not engage in work before the hiring/payroll process is complete with HR
- Ensuring that required university training (FERPA, HIPAA, confidentiality clauses, etc.) is completed as required



#### Supervisor Responsibilities

- Keeping accurate records of all hours worked by the WS student and ensuring overages do not occur
- Ensuring a primary and/or secondary supervisor is available to students for sign-in, sign-out, supervision, instruction and emergency assistance any time a student is working
- Providing training sufficient to accomplish the job requirements and providing related training materials
- Presenting and clarifying job expectations and departmental requirements



#### Supervisor Responsibilities

- Treating the student as a professional staff member
- Encouraging open and honest communication with the WS student
- Providing ample work to ensure students are busy and not studying during their shift
- Providing regular feedback regarding job performance and formal evaluations at least once per semester
- Ensuring that the WS student remains in compliance with federal, state, institutional, and program regulations



#### Joint Responsibilities

- Maintaining accurate records of all hours worked
- Communicating regarding the failure of either party to meet established responsibilities and working to find a solution if such failures occur
- Ensuring the position helps the student progress towards their academic, professional, and/or personal development goals
- Preventing the student from exceeding weekly/annual work limits





# Posting & Hiring

How to submit a job description & select a candidate for employment

#### Posting Access

- Supervisors will need to complete this training module, the module on operating JobX, and certify their completion on Sakai before taking any further action with the WS program such as positing a new position. New supervisors will also need to complete registration.
- Supervisors who have completed training will gain access to the JobX system once the WS Team confirms all required items have been completed.
- Once access is granted, supervisors will immediately be able to submit job postings & review applicants.

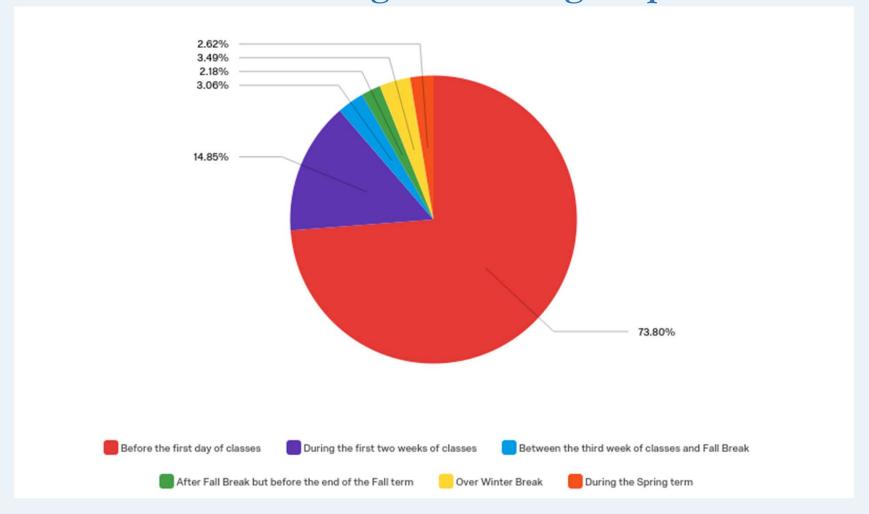


## Posting Timeline

- May: JobX site updated to new software version
- June: JobX site opened for supervisors to post positions.
  - FWS jobs must be submitted by June 30<sup>th</sup> to guarantee they will be available when the system opens to student in August.
  - Jobs submitted July 1-31 may not be posted by August 1
  - Jobs submitted after August 20 will not be accepted for the Fall Term
  - Spring jobs can be posted Nov. 5<sup>th</sup>–Feb. 28<sup>th</sup> on a rolling basis
- June: WS Staff begin approving and displaying submitted jobs on the JobX website.
- August 1: FWS students receive an email including instructions to the training site. Students are also granted access to view and apply to jobs using the online application system



#### When do students begin searching for positions?



- 74% begin looking for a job before school ever starts;
- 90% do their looking before the third week of classes.

Make sure to **post your jobs before June 30**<sup>th</sup> to reach these students.

## Hiring Overview

- Once students begin applying on August 1<sup>st</sup>, supervisors can officially begin the hiring process. This includes
  - reviewing applicant information in JobX
  - interviewing new WS students (via phone, in-person, online, etc.)
  - hiring new WS students, after an interview
  - hiring WS employees returning to the same work location (no interview required)
  - setting up a payroll/I-9 meeting with your HR for the student
  - collecting certification that the student completed WS training

Reminder: All WS students must be hired through JobX first and then set up in Connect Carolina with you HR Representative/Shared Services Center. Hiring departments are liable for all wages paid to students not hired through JobX, regardless of whether the student is in a work-study position in Connect Carolina.





## Payroll, Time, & Wages

Setting up pay, marking down time, and getting wages to students

## Payroll Overview

- All WS students <u>MUST</u> be set up in payroll and complete I-9 verification on or before their first day of work. Failure to do so will violate WS program regulations and may violate US employment law.
- We strongly recommend setting up the appointment between the student and your HR Representative/Shared Services Center <u>and</u> doing so prior to the anticipated first day of work.
- Once your HR Representative/Shared Services Center has approved the student, the student is cleared for employment with the University, though they need to submit their completion of WS training to you if they have not already done so.
- Students may begin work on the first day of class only if all aforementioned steps are complete. Please do not let your students begin work before this time!



## Time

• Students are only allowed to work under the FWS program during periods of "active enrollment"

Fall Semester	Work may begin on/after the first day of Fall classes and must stop on/before the last day of fall exams for Fall-only positions and students who are not enrolled in the Spring term.	
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Reminder: an registered supervisor must be present any time a student is at work



### Time

- Students will submit hours for supervisor approval in TIM, in much the same way that full-time SHRA employees do.
- Supervisors approve or revise submitted time sheets before sending them on to HR for approval and payout
- Time information for pay periods as well as expected submission days and pay dates can be found online at <a href="http://finance.unc.edu/departments/strategic-sourcing-payment/payroll/schedules/">http://finance.unc.edu/departments/strategic-sourcing-payment/payroll/schedules/</a>



## Wages

- Students will receive biweekly paychecks for hours worked approximately 12 days after the end of the pay period
- Around 14 days after the end of the pay period, wage disbursement information is sent to the WS team
- At this time, the WS team will begin reconciling student earnings. The WS team will contact students and their supervisors if one of the following conditions is true:
  - A student's total earnings is within \$550 of their FWS award
  - A student's total earnings have exceeded their FWS award

If the student's earnings exceed their award, supervisors will be required to submit a PAAT entry for the overage and either convert the student to departmental funding or end their employment.





# Best Practices & Common Errors Errors

Lessons from those who have gone before

Why do students pick FWS jobs?	0/0	Count
They are interested in the work	66.5%	<u>432</u>
Monetary reasons	47.4%	308
It relates to their professional goals	45.7%	<u>297</u>
The job location is convenient	44.5%	289
It relates to their personal goals	38.5%	<u>250</u>
It relates to their academic goals	36.8%	<u>239</u>
They provide a service that they feel is important	32.5%	<u>211</u>
They know other employees in the position/department	14.2%	92
They know the supervisor	10.0%	65
Other	5.4%	35

When defining positions & interviewing potential employees, we recommend looking for students who have a vested interest in the work and those aligned goals.



A 2018 survey of 670 FWS student-respondents revealed the top 3 complaints of FWS student participants are:

- 1. Students did not have enough work to do
- 2. Students wanted more responsibility and more difficult projects
- 3. Students did not plan their hours properly and either didn't earn their full award or ran out of funding too early in the year

To help prevent these issues, we strongly recommend

- 1. Keeping a list of additional tasks on hand that students can complete as time allows. Planning out larger, semester- or year-long projects that students can be in charge of and work on as time allows.
- 2. Helping students plan out their hours for the year when they first come on staff (e.g. calculate number of hours/week they'll need to work during each week of the academic year in order to earn their full award)
- 3. Creating & instituting a training program at the beginning of the year. Include ways for students to continue advancing their skills as time allows over the remainder of the year so that they can move on to higher levels of responsibility.



In addition to sending your timely updates on student earnings, the WS Team provides two easy-to-use tools to help with tracking:

- 1. An Excel Time Record Log located online at <a href="https://unc.studentemployment.ngwebsolutions.com/Cmx">https://unc.studentemployment.ngwebsolutions.com/Cmx</a> Content.aspx? <a href="cpId=7">cpId=7</a>.
- 2. An update to the JobX site which displays the student's awards and earnings both during the hiring process and on-demand (located on the User Dashboard under the Current Hires & Awards tab)

Please use these tools to track student earnings and ensure that students are on a reasonable earning pace.



#### Most disciplinary issues result from three factors

- 1. Lack of supervision & guidance (especially regarding expectations)
- 2. Attendance issues
- 3. Unclear communication

#### To combat these issues, we recommend the following solutions:

- 1. Clearly document and discuss each student's assigned duties and expectations with them at the beginning of the year. If those items vary over time, make sure to document the changes & review the information with the student.
- 2. Create a mutually-agreed upon work schedule and operating policy/procedure for each student worker. Have a procedure in place to amend the schedule, should the need arise.
- 3. Have designated staff on hand to help supervise and work with WS employees at all times, including when the primary supervisor is not available (e.g. ill, in meetings).
- 4. Schedule regular meetings/communication with each WS student; just 5 minutes once a week can prevent major issues.
- 5. Complete required semesterly evaluations to provide students with performance feedback



### Common Errors

The following are the four most common program administration errors by supervisors during the 2017-18 academic year

- 1. Allowing the student to exceed their annual earnings limit
- 2. Allowing the student to begin work without collecting proof of their WS Training completion
- 3. Allowing the student to begin work without completing the required verification and payroll process with their HR Representative
- 4. Hiring students without their approval

We strongly recommend tracking student hours AND making a hiring checklist (see next slide) to prevent these errors.



## Hiring Checklist Example

The following is an abbreviated of a list of tasks an WS supervisor might follow for new hires. It is by no means an exhaustive list for all positions, and should be amended to suit your needs.

- 1. Confirm that the student has been hired in Job X
- 2. Exchange contact information between the student and supervisor
- 3. Set up a meeting between the student and your HR Representative or Shared Services Center prior to/on the first day the student is employed
- 4. Ensure the student has completed required WS Training & provided documentation
- 5. Ensure the student has completed any departmental-specific training (FERPA, HIPAA, confidentiality, etc.)
- 6. Ensure the students has completed all employment verification (I-9) and payroll process (W-4, NC-4, & direct deposit enrollment) with your HR Representative
- 7. Create weekly work schedule and provide student with a list of documented expectations
- 8. Review federal program regulations including when students are/aren't allowed to work.
- 9. Review operating norms (Job duties, sign in/out protocols, who to go to for help, no studying on job, additional duties to complete as time allows, job attire, etc.)
- 10. Discuss any other supervisor-specific items (e.g. performance review periods, mentoring opportunities, additional training opportunities, areas of concern)

You can find a more in-depth list at

https://unc.studentemployment.ngwebsolutions.com/Cmx Content.aspx?cpId=7





## Next Steps

Getting access and planning for the future

## Confirm Training

#### **NEW/RETURNING WS SUPERVISORS:**

After reviewing this module and the JobX module, please complete the WS Supervisor Quiz on Sakai at:

https://sakai.unc.edu/portal/site/6fc32752-a8d8-44c7-a75b-298df923a3ac/tool/f2f0c380-b721-4644-895e-40cfad07ba02

\*\*Please Note: you will need to copy and paste this link into your browser.

#### **NEW FWS SUPERVISORS ONLY:**

In addition to the items above, to certify that you have completed this training session and to gain access to the JobX system, complete the certification at <a href="https://unc-ch.formstack.com/forms/?2712305-1unHg3PbMH">https://unc-ch.formstack.com/forms/?2712305-1unHg3PbMH</a> using passcode "WSTrainingAccomplished18-19" when prompted.

By participating in the FWS Program, you attest that you have read this document in its entirety, fully understand the information presented, and agree to the terms outlined in the preceding slides.



## JobX Access

The WS Team will review your training confirmation and credentials. If approved, you will be granted access to the JobX system and may begin posting new positions as soon as access is established. You can log into the JobX system at:

https://unc.studentemployment.ngwebsolutions.com

Access is typically granted according to the following timelines:

- Training confirmation submitted May 1- August 31, access granted in 2-5 business days
- Training confirmation submitted after August 31st may be held for batch uploading.



## Personnel Changes

When a FWS supervisor leaves and is not replaced in JobX, it prevent us from being able to communicate with your department. Please help us to avoid these unfortunate and potentially costly circumstances by notifying us of any change in employment.

If a new user needs access to JobX to replace a current WS supervisor at any point in the year, please email workstudy@unc.edu using the subject message "WS Supervisor Replacement" and use the replacement option on the WS Registration page.

We will be happy to expedite JobX access and provide any training resources or assistance necessary in these cases.



## Thank you for completing Work-Study Supervisor Training!

You should now be done with WS Supervisor Training Module over regulations and program overview. If you have not done so, you will also need to review the JobX Supervisor Training Module, available at <a href="https://unc.studentemployment.ngwebsolutions.com/Cmx">https://unc.studentemployment.ngwebsolutions.com/Cmx</a> Content.a <a href="mailto:spx?cpId=7">spx?cpId=7</a>. This module contains instructions on how to create a job posting in the JobX system.

We appreciate your interest in the WS Program as well as your willingness to mentor WS students. We look forward to working with you!

