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Effective: 06/16/2015
1 INTRODUCTION

This document has been developed by Student Financial Services in order to familiarize employees with:

- Washington State University Policies and Procedures
- Student Financial Services Guidelines

1.1 Welcome

Student Financial Services Leadership Commitment: We are committed to fostering an environment of teamwork and collaboration through trust and respect of each employee.

The Management team strives to:

- Encourage employees to grow professionally
- Provide employees with the tools and resource to perform their duties
- Spread the workload among staff
- Encourage an open line of communication for employees to discuss challenges and share ideas
- Offer various forms of support to find solutions that will benefit the issue at hand
2 EMPLOYEE DEFINITION AND STATUS

2.1 Employment Classification

**WSU Policy**
Washington State University employees are classified as:
- Administrative Professional (Exempt from overtime and non-exempt from overtime)
- Civil Service (Classified Staff) (Exempt from overtime and non-exempt from overtime)
- Bargaining Unit Staff
- Faculty
- Temporary/Hourly
- Graduate Assistants

**Student Financial Services Guidelines**
Student Financial Services employs the following classifications:
- Administrative Professional (Exempt from overtime and non-exempt from overtime)
- Civil Service (Classified Staff) (Exempt from overtime and non-exempt from overtime)
- Temporary/Hourly
- Graduate Assistants

2.2 Probationary Period/Trial Service for Civil Service Employees

**WSU Policy**
Probationary and trial service periods provide an opportunity for the employing department to observe and assess an employee's work and to train and aid the employee in adjusting to a new position. These periods allow the University to determine whether or not to grant the employee permanent status in that position.

A new employee who does not have permanent status with the state of Washington must serve a probationary period when appointed to a civil service position.

An employee who has passed a probationary period and holds permanent status with the state of Washington may be required to serve a trial service period even when she or he holds permanent status in the classification, e.g., in the case of promotion or transfer.

Probationary and trial service periods are for six months. During these six months an employee in probationary or trial service may not use any Annual Leave. They may on the other hand use their Personal Holiday, Sick Leave, or Compensatory Time if it has been accrued.

If an employee uses leave without pay (LWOP) for an entire shift, her or his probationary or trial service period is extended on a day-for-day basis.

For more information please visit the WSU Business Policy and Procedures Manual at [http://public.wsu.edu/~forms/HTML/BPPM/60_Personnel/60.31_Probationary_and_Trial_Service_Periods_for_Civil_Service_Employees.htm](http://public.wsu.edu/~forms/HTML/BPPM/60_Personnel/60.31_Probationary_and_Trial_Service_Periods_for_Civil_Service_Employees.htm)

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.
2.3 Telework Arrangements

**WSU Policy**
An approved telework agreement allows an employee to regularly work from home or an alternative work site. Washington State University recognizes telework as a work option that may meet a variety of needs, including, but not limited to:

- Enhancing employee productivity and satisfaction,
- Reducing commute trips, and
- Addressing space restrictions.

A telework arrangement may be assigned or established through mutual agreement between a department head and an employee. Alternative work sites or teleworking may be required for some positions. Work location is determined by WSU.

Telework arrangements must meet the following requirements:

- Be for a prescribed time;
- Be revocable at the discretion of the responsible dean, vice president, or appointing authority; and
- Be subject to prior approval by the responsible dean, vice president, or other appointing authority.

An employee may rescind an agreement to a voluntary telework arrangement by providing notice consistent with the terms of the agreement.

For incidental occurrences, such as inclement weather, University closure, or family emergency care, a formal telework agreement may not be required. The employee must obtain approval from his or her supervisor before working from an alternative work site.

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy for only incidental occurrences. Prior approval must be obtained from the supervisor or in their absence a member of the Student Financial Services Management Team.

- Employee will need to explain to the approver what the work project entails.
- Upon return provide what was accomplished..

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Effective: 06/16/2015
3 EMPLOYMENT POLICIES

3.1 Equal Employment Opportunity

**WSU Policy**
Please see Washington State University’s Executive Policy Manual, Executive Policy #12 on [https://public.wsu.edu/~forms/HTML/EPM/EPS_Policy_Approval_and_Distribution.htm](https://public.wsu.edu/~forms/HTML/EPM/EPS_Policy_Approval_and_Distribution.htm).

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy

3.2 New Employee Orientation

**WSU Policy**
New employees are to enroll in new employee and benefits orientation classes. Enrollment information is available from the Employees—Training and Development area of the HRS website at: [http://hrs.wsu.edu/Employee%20Orientation%20Schedule](http://hrs.wsu.edu/Employee%20Orientation%20Schedule).

**Student Financial Services Guidelines**
New employees will meet with the Administrative Staff to complete the appropriate forms needed. The Office Manager will guide the employee in reviewing the "New Employee Checklist" and ensure that all items have been discussed. Permanent Staff will meet with the Executive Administrative Assistant to go through an entrance employment checklist and temporary employees will meet with the SFS Program Coordinator for SFS Temporary Employment.

3.3 Change of Personal Contact Information

**WSU Policy**
Please visit [http://www.wsu.edu/payroll/fspay/fspay.htm](http://www.wsu.edu/payroll/fspay/fspay.htm) for any changes to personal information e.g. phone, address, name, social security number.

**Student Financial Services Guidelines**
Employees are highly encouraged to fill out/update an employee information sheet which will be distributed on the first working day of the new calendar year (January). It is necessary for SFS to have cell phone numbers for staff who will be participating in outreach events.

3.4 Reporting Accidental Injuries and Work-Related Illnesses

**WSU Policy**
University faculty, staff, and students are to promptly report all accidental injuries and work-related illnesses to immediate supervisors for evaluation and possible investigation.

Supervisors of University departments coordinating the use of University facilities or University-sponsored activities are responsible for reporting all accidental injuries incurred by individuals who are not employed by WSU.

Supervisors must report any accidental injury or work-related illness within 24 hours of occurrence. For more information please visit the WSU Business Policy and Procedures Manual at [http://public.wsu.edu/~forms/manuals.html](http://public.wsu.edu/~forms/manuals.html).

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.
3.5 Weather-related and Emergency-related Closings Notifications

**WSU Policy**
At times, emergencies such as severe weather, fires, or power failures can disrupt company operations. In such instances, University administrators will decide on the closure and provide the official notification to the employees. The University provides notification of emergencies to WSU Pullman personnel and students as follows:

- The Crisis Communications System (CCS) contacts WSU students, faculty, and staff who have registered for the system with emergency warnings and notifications by:
  - Voice and text messages to cellular telephones,
  - Voice messages to landline telephones, and
  - E-mail messages to WSU and personal e-mail addresses.
- For more information regarding the CCS, go to: [http://alert.wsu.edu/Communication](http://alert.wsu.edu/Communication)
- Supervisors and others in charge of units, residence hall counselors, and/or other appropriate people provide verbal information and instructions to personnel and students.
- WSUALERT provides direct e-mail notice to all subscribers on the University e-mail system.
- WSUALERT also provides notice on the WSU Alert website at: [http://alert.wsu.edu/](http://alert.wsu.edu/)
- WSUALERT provides emergency messages on the WSU Alert telephone hotline at 509-335-2345.
- WSU Announcements provides notice to all subscribers of WSU Announcements.
- ZZUSIS provides notice to all subscribers to the Portal system.
- Select the Campus Spotlight link to view emergency information and/or directions, as applicable.
- Select a campus/division in the "My Preferences" settings to receive targeted notices for that campus/division.
- Educational Telecommunications and Technology provides notice through KWSU AM and KRFA FM radio.
- The WSU News Service provides emergency messages and news updates to local and regional media, including radio and television stations, as appropriate. The media outlets may provide notice as they receive the information and choose to broadcast it.
- The Emergency Communication Resources website provides information concerning internal and external communication resources for the WSU Pullman campus, at: [http://alert.wsu.edu/EmergencyCommWSU](http://alert.wsu.edu/EmergencyCommWSU)

For more information please visit the WSU Business Policy and Procedures Manual at [http://public.wsu.edu/~forms/manuals.html](http://public.wsu.edu/~forms/manuals.html).

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.
4 STANDARDS OF CONDUCT

4.1 Attendance and Punctuality

WSU Policy
Departmental discretion for attendance and punctuality policies.

Student Financial Services Guidelines
The expectation is that you arrive on time for work. Your work schedule is 8:00 a.m. to 5 p.m. with an hour lunch, unless other arrangements have been made with your supervisor to work a flex schedule. Regardless of a standard work day or flex schedule, the expectation is that the employee will arrive promptly for work and not leave earlier than their daily work schedule, unless preapproved.

4.2 Work Schedule

WSU Policy
Departmental discretion with input from Human Resource Services.

Student Financial Services Guidelines
Office business hours are 8:00 a.m. to 5:00 p.m. The Student Financial Services allows for a flexible working schedule. Flex time assists with covering the operational needs of the office and allows flexibility for employees due to family considerations. During peak processing times throughout the year, flex time schedules are not possible for some staff and it is necessary to default back to a standard work schedule.

The Flex Hours Selection form is issued to employees during the fall, spring, and summer sessions.
- 7:00 am is the earliest time to arrive
- 8:30 am is the latest time to arrive
- 5:30 pm is the latest time of departure
- A minimum of a 30 minute lunch time must be factored in with a maximum of 1.5 hours for lunch
- The initial Flex time request is given to the immediate supervisor,
- Upon the supervisor approval the form is forwarded to the Management Team for final approval and to ensure operational needs are fully staffed.

Managing staffing schedule with various outreach events: Supervisors will work with employees assisting with outreach events/workshops to ensure that schedules are adjusted accordingly if working a non-scheduled work week. This is especially important for Civil Service staff due to specific paperwork that must be completed, submitted and signed by the employee when working an adjusted work week.

4.3 Office Space/Work Station Area

Employees are expected to maintain a space that is relatively free of clutter and presentable for co-workers and visitors. There is no janitorial service in office spaces. All staff is responsible for emptying their own garbage frequently to avoid unpleasant odors. Garbage can be placed in the garbage containers in the kitchen area and garbage bags are located in the kitchen.

Kitchen etiquette, please be considerate when using the kitchen area and keep the following in mind:
- Make sure to dispose of old food in the refrigerator
- Be considerate of the limited space available in the refrigerator
- Please do your own dishes daily and do not expect others to clean up after you
- If warming up food in the microwave, please clean up if food spatters around the interior walls
- If food is sitting out on the round table, this means that it’s a “free for all” for staff to enjoy

Effective: 06/16/2015
4.4 Absence and Lateness

**WSU Policy**
Departmental discretion for absence and lateness policies.

Extended illnesses over 3-days or chronic intermittent absences may qualify for Family and Medical Leave (FML) employees are requested to adhere to this university policy.

**Student Financial Services Guidelines**
From time to time, it may be necessary for an employee to be late or absent from work. Student Financial Services is aware that emergencies, illnesses or pressing personal business that cannot be scheduled outside work hours may arise. It is the responsibility of all employees to:

1. Notify their immediate supervisor by phone, text, or email,
2. Notify the Office Manager by phone, text, or email
3. Sick leave notification should be given at least 30 minutes in advance of when the employee is scheduled to begin work.

4.5 Unauthorized Absence

**WSU Policy**
Administrative Professionals: Unauthorized absences are treated as unauthorized leave without pay. Possible ramifications of unauthorized absences are addressed in the Faculty Manual and the Administrative Professional Handbook.

Civil Service (Classified Staff): Unauthorized absences will be treated as unauthorized leave without pay. Possible ramifications of unauthorized absences are addressed in WAC 357-31-105.

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.

4.6 Meal and Break Periods

**WSU Policy**
An overtime-eligible employee receives a minimum of a 30-minute unpaid meal break toward the middle of each work shift, no more than five hours after the beginning of the shift.

The meal period may not be required if the employee signs a written agreement with the department manager or director to voluntarily waive the meal period on a regular basis. In consideration for the ability to work a "straight shift," the employee agrees to waive a meal period as defined in WAC 296-126-092. (A "straight shift" is defined as a work period without interruptions for meal breaks.) Under such an agreement, the employee is entitled to eat at any time during his or her shift as time and work duties permit. The employee is not entitled to relief from duty while he or she eats. SFS does not endorse this option due to the need for staff to be available for customer service during the standard work day of 8:00-5:00.

An overtime-eligible employee receives a 15-minute paid rest period for every four hours worked. An appropriate rest period provides a relief from duty and is uninterrupted. While taking a rest period, the employee is subject to call to return to work as needed by the employer.

An overtime-eligible employee may take his or her rest period on an intermittent basis. An intermittent rest period is a period of less than the full 15-minute rest period in which the employee has an opportunity to rest or relax during the performance of his or her duties. The employee may take as many intermittent rest periods as necessary to total the allowed 15-minute rest period. When the employee's rest period is interrupted, the employee's rest period is deemed to be an intermittent rest period. The employee is allowed to complete his or her rest period prior to the end of the four-hour period in which the rest period occurs by taking additional intermittent rest periods. The employee may not waive rest periods or combine rest periods at the end of a shift.
For more information contact HRS; telephone 509-335-4521. Also refer to RCW 49.12, which allows employees and employers to mutually agree to vary rules and policies adopted by the Department of Labor and Industries in WAC 296-126-092 under the Industrial Welfare Act.

**Student Financial Services Guidelines**

Student Financial Services follows the above university policy.

### 4.7 Dress Code

**WSU Policy**

Departmental discretion for dress code.

**Student Financial Services Guidelines**

Student Financial Services employees are expected to present a business casual, clean, and professional appearance while conducting business, in or outside of the office. Dressing in a fashion that is clearly unprofessional, that is deemed unsafe, or that negatively affects the Office of Student Financial Services’ reputation or image is not acceptable. If clothing is considered not appropriate you may be asked to change. If you are questioning whether what you are wearing is appropriate for the office, your colleagues (and worse, your boss) will too.

The following are examples of inappropriate attire, but they don’t exclusively define the office’s general policy of requiring dress that is appropriate for the workplace.

- No athletic clothing, like yoga pants or sweats
- Tank tops, spaghetti straps and halter tops must be covered with a cardigan or suit jacket and should not be revealing.
- Showing midriff is not office appropriate
- Too much skin and visible undergarments should not be peeking through the fabric you are wearing. Lightweight linen that is breezy and comfortable on the beach is inappropriate at work, not to mention, uncomfortable for your co-workers.
- Length of dresses and skirts should reach the bottom of your fingertips when your arms are placed down at your side. (Dress tops should not be revealing)
- Shorts are ok during the summer months if they are the appropriate length (walking shorts, bermuda’s or just above the knee) and dressed up (not worn with a sloppy t-shirt). **NO short-shorts**
- T-shirts with offensive statements, political and religious views, favorite pastimes and personal tastes should not be worn.
- Jeans should be neat and clean with no stains or large tears
- Sandals/dressy flip flops are permitted, but no bare feet

Because personal preferences and fashion trends vary greatly, it is the supervisor’s discretion to identify and address concerns not listed above on an as-needed basis.

Employees may wear clean presentable WSU gear throughout the week. For Outreach Events, staff will be given specific directives on appropriate attire based on the type of outreach event.

Anytime scheduled meetings or other work commitments involve the general public, outside business representatives, University officials, Business and Community leaders, or government employees outside the University, good judgment in choice of attire is expected. This will normally mean wearing business dress attire for the day.

Above all else, employees are asked to use their good judgment in choosing appropriate attire for work at all times.


4.8 Fragrance Policy

It is the goal of our organization to ensure that we have an environment that is conducive to learning and working. Several SFS staff are chemically sensitive to varying degrees of fragrance exposure. In an essence, from a medical standpoint, this exposure makes it incredibly difficult for a person with these sensitivities to work productively in a work environment that is “friendly” to fragrances. Even the slightest scent can trigger an attack for an individual with this medical challenge. The severities of the symptoms vary from mild irritation to several debilitations that are not healthy for such an individual.

As well, customers we serve may also have sensitivity and/or allergic reactions to various fragrant products. Therefore, Student Financial Services staff will be asked to abide by the following guidelines:

1) Employees are strongly discouraged from using heavily scented fragrances, colognes, lotions, powders, deodorants, shaving and hair products, and other similar items that are perceptible to others. Employees wearing fragrances at levels that may affect others will be asked by their supervisor to modify or discontinue their use of these products.

This policy is not intended to prohibit the use of scented personal products, but is instead intended to discourage strong scents and to keep their use to a minimum among employees who choose to use them.

2) Other fragrant products (scented wax/candles, air fresheners, potpourri and similar items) will not permitted in the Student Financial Services workplace environment with the exception if a gift has been given to an employee that will be taken home by the employee immediately.

Items that contain scents that can trigger chemical sensitivity reactions include (but are not limited to):

- Colognes and aftershaves
- Fragrances and perfumes
- Lotions and creams
- Potpourri
- Air fresheners and deodorizers
- Candles
- Wax burners/oil burners

Thank you for your flexibility and your good faith efforts to meet this accommodation, as a growing number of people suffer from a range of debilitating reactions from exposures to these everyday materials, with this sensitivity affecting about 16 percent of the U.S. population.

Your willingness to keep SFS a comfortable, healthy place for all employees to do their work is greatly appreciated.

4.9 Office Conduct

**WSU Policy**

Refer to Washington State University’s Executive Policy Manual, Executive Policy #15, which is Policy Prohibiting Discrimination and Sexual Harassment.

**Student Financial Services Guidelines**

Student Financial Services follows the above university policy.

Employees should respect their co-workers and maintain a professional manner at all times.

No profanity is allowed in the department.

Food consumption by employees working in the in the reception/front lobby area is not allowed.
Employees are encouraged to maintain a clean office/workspace as a courtesy to coworkers and clients.

Employees may carry and use personal cell phones for calls and texting while at work on a sporadic basis. Cell phone usage should not disrupt the normal daily workflow.

**4.10 Use of University Equipment**

**WSU Policy**
State officers and state employees are obligated to conserve and protect state resources for the benefit of the public interest, rather than their private interests. Responsibility and accountability for the appropriate use of state resources ultimately rests with the individual state officer and state employee, or with the state officer or state employee who authorizes such use.

A University employee may not use state resources under her or his official control, direction, or custody for private benefit or gain of the employee or any other person.

The use of state resources related to the conduct of official business is permitted. The use of state resources for any purpose other than official state duties is governed by state law (RCW 42.52, Ethics in Public Service; WAC 292-110-010, Use of State Resources). These laws provide for the personal use of state resources under limited circumstances. For more information please visit the WSU Business Policy and Procedures Manual at http://public.wsu.edu/~forms/manuals.html.

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.

**4.11 Ethics**

**WSU Ethics Brief**
This is a brief summary of the Ethics in Public Service Act (RCW 42.52). Please see the State of Washington website for complete information on ethics rules, FAQ’s, actual cases, enforcement and settlements, etc. www.ethics.wa.gov. Other excellent sources: BPPM 10.21, 20:37; Executive Policy #4 and #27; RCW 42.52.160; WAC 292-110-010.

Core Principle: All state officers and employees have a duty to ensure the proper stewardship of state resources. Public office – whether elected or appointed – may not be used for personal gain or private advantage.

Compliance with ethics law is an individual responsibility of all state employees. Employees can violate the ethics law act unintentionally and be subject to fines and penalties.

State resources include: email, phone, computer, internet, vehicle, equipment, facilities, data, people, time, etc.

<table>
<thead>
<tr>
<th>Prohibited Uses</th>
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<tbody>
<tr>
<td>Employees are prohibited from using (ANY) state resources for:</td>
</tr>
<tr>
<td>1. Personal financial gain</td>
</tr>
<tr>
<td>2. Promotion of outside organizations</td>
</tr>
<tr>
<td>3. Promotion of campaigns</td>
</tr>
<tr>
<td>4. Lobbying efforts</td>
</tr>
<tr>
<td>5. Any use prohibited by law or WSU policy</td>
</tr>
<tr>
<td>6. Any private use of state property away from its official duty location</td>
</tr>
</tbody>
</table>

*The exception for de minimis personal use DOES NOT apply to prohibited uses. Conflicts of interest include the following prohibited conduct and situations: activities incompatible with public duties (impacting discharge of
official duties), financial interests in transactions involving the state, outside compensation as related to official duties, receiving special privileges or gifts as related to decisions, actions, inactions or influence of official duties.

Conflicts may be actual or perceived. Potential conflicts should be disclosed (with proper administrative authority) in order to determine if a conflict does exist, and, to develop a plan for managing the conflict.

Suspected actions or ethics issues, or questions? Contact your supervisor, or Internal Audit, 335-2001.

**Student Financial Services Guidelines**
Student Financial Services follows the State of Washington RCW and WAC rules related to public service work ethics.

### 4.12 Complaint Procedure

**WSU Policy**
Washington State University’s Human Resource Office has the following online form available [http://hrs.wsu.edu/Utils/File.aspx?FileID=45](http://hrs.wsu.edu/Utils/File.aspx?FileID=45). This form contains details of were to go and what to do per your concern. It also describes first steps an employee should take to try and mediate a problem, or what an employee must do if they feel they must file a formal complaint.

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.

### 4.13 Corrective Procedure

**WSU Policy**
Corrective actions are preventative measures taken to promote compliance with established policies, rules and expectations. Corrective actions also attempt to improve or modify unacceptable behavior.

Disciplinary actions are formal actions taken when corrective measures fail to correct previous problems. Disciplinary actions are also taken when the seriousness of offenses warrant more formal measures.

Generally corrective and disciplinary actions are progressive, but the University may respond as it deems appropriate to the incident under consideration. For more information please visit the WSU Business Policy and Procedures Manual at [http://public.wsu.edu/~forms/manuals.html](http://public.wsu.edu/~forms/manuals.html).

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.

### 4.14 Return of University Property

**WSU Policy**
Any University property issued to employees, such as computer equipment, keys, parking passes or company credit card, must be returned to the University at the time of termination. Employees will be responsible for any lost or damaged items.

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.
4.15 Social Media Policy

WSU Policy
Social media contains powerful communication tools that can be of great benefit to forwarding the mission and the message of Washington State University. These tools can also have a significant impact on organizational and professional reputations. Washington State University recognizes that social media sites, such as Facebook, LinkedIn, Twitter, YouTube, etc., and individual web pages, weblogs, or blogs, can be effective tools for exchanging information and raising the visibility of the University. Therefore, employees are permitted and encouraged to contribute appropriate content about WSU and their work. All WSU personnel are allowed to visit or follow University social media accounts to stay abreast of University news and information and to utilize social/new media tools as sources of information and professional development in keeping with the requirements of their positions. However, there are a number of rules and guidelines when posting information about the University on both official and individual social media sites, blogs, and other forms of user-generated media. The use should be for the benefit of the University. The use should also be consistent with the nature of the employee's official business or be approved by the employee's direct supervisor. Any other communications fall under the de minimis standards of the University (see BPPM 20.37). The entire WSU Social Media policy can be found under “Use of Social Media and Related Online Communication”, by clicking here.

Student Financial Services Guidelines
The SFS Communications team monitors all SFS Social Media sites, including our WSU partners’ sites, and it has a process to respond to individuals who may have questions or concerns about SFS. It is important that only authorized SFS staff post, or provide responses on the SFS Social Media accounts or partnering University accounts related to Student Financial Services as an office and accounts of students we may be engaging and/or assisting. SFS staff may contact the Assistant Director of Communication if they encounter any social media related communication or “conversation” they feel needs an official response from SFS as in organization.

Personal Social Media Guidelines
All SFS staff, including student workers, will be required to maintain an image of positivity within our office whether on and off campus in terms of Social Media. All SFS staff should limit their personal use of social media accounts to their personal devices during breaks or lunch periods, unless authorized by their supervisor for work-related purposes. Any SFS employee found posting and/or engaging in any type of negative, offensive, rude, or vulgar comments about their experience working within the SFS office and/or in regards to their dealings with a student and/or other SFS customer on any University social media account may be subject to disciplinary action.
5    COMPENSATION POLICIES

5.1 Timekeeping Procedures

WSU Policy
Each employee must fill out the appropriate paper or electronic time/leave report every month, and time records must be completed in accordance with the Universities time-reporting guidelines.

Student Financial Services Guidelines
Student Financial Services follows the above university policy. Permanent staff are expected to complete time/leave reports using the electronic form available from the HRS website link, print out hard copy and submit to the SFS Executive Administrative Assistant for preliminary review. If no errors, forms are forwarded to supervisors to sign immediately after. Temporary Staff will be responsible for submitting time reports to their supervisor twice a month to ensure they meet the deadlines for pay periods.

Individuals who have Overtime to be paid or Leave Without Pay on their time-reports during 1st – 15th or 16th – 31st must submit a time-report for that period a day after the 15th or 31st of the month. It is the employee’s responsibility to submit time/leave reports no more than 5 business days after the end of the month, failure to do so may result with a follow up from management.

5.2 Overtime/Comp Time

WSU Policy
Overtime compensation/paid overtime is accrued by non-exempt employees in accordance with federal and state wage and hour restrictions. All overtime work performed must receive the supervisor’s prior authorization. Please visit http://public.wsu.edu/~forms/HTML/BPPM/60_Personnel/60.59_Overtime-Eligible_Employees.htm for more information on overtime/comp time pay.

Student Financial Services Guidelines
Student Financial Services follows the above university policy. All overtime must be preliminarily approved by the AVP and preapproved by the associate directors in writing and stapled on to time/leave reports. In addition, employees will be asked to complete the Work Flow Manager tool to document task or duty requiring overtime work.

5.3 Payroll and Paydays

WSU Policy
Official paydays may be found here http://www.wsu.edu/payroll/payday/paydays.htm.

Student Financial Services Guidelines
Student Financial Services follows the above university policy.

5.4 Performance and Salary Reviews

WSU Policy
Performance evaluations provide the following benefits:

- Documentation of employee competence and productivity,
- Support for achievement of organizational goals and objectives, and
- Documentation of an employee's strengths and areas needing improvement.

Performance evaluations are required at least annually.

Administrative professional (AP) personnel are evaluated annually in accordance with guidance found in the Administrative Professional Handbook. To view the handbook, go to the HRS AP Handbook website at:
Human Resource Services provides instructions to supervisors during the spring semester and the form may be completed and/or printed from 60.55.11. Other forms and/or information may be used to support the rating.

The AP employee provides his or her achievements for the review period and goals for the next review period. Submitted materials should not exceed three pages. Route copies of the signed evaluation and all of the evaluation materials to:

- Employee,
- Employee’s immediate supervisor,
- and Human Resource Services.

Direct questions regarding the annual review process to Human Resource Services; telephone 335-4521.

The following civil service employee performance evaluation requirements and procedures in this section are in accordance with WAC 357-37. Supervisors must provide feedback and formally evaluate the performance of:

- probationary employee or permanent employee serving a trial service or transition review period before the employee attains permanent status in the position; and
- A permanent employee at least once annually prior to the employee’s scheduled Periodic Increment Date (PID). See WAC 357-28-050 and -055 for information about the PID.

NOTE: Immediate supervisors may postpone evaluation for employees who have recently been reassigned, transferred, laid off, or demoted to their current positions until they have completed six months of service in the new positions.

Performance evaluations are not to be used to initiate personnel actions such as transfer, promotion or discipline. The immediate supervisor is responsible for preparing the civil service employee performance evaluation in accordance with this policy. The evaluation is reviewed by the employee’s second level of supervision. Use the Employee Performance Evaluation form to document the evaluation of a civil service employee. Other forms and/or supplemental information may be used to support the rating. A PDF version of the Employee Performance Evaluation form may be completed and/or printed from 60.55.9-10.

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy. Management will strive to meet with individual staff 2-3 times a year for healthy check-ins to evaluate position descriptions and determine progress.
6  TIME-OFF BENEFITS

6.1 Holiday Policy

**WSU Policy**
All employees of regular status (Administrative Professionals exempt and non-exempt, Civil Service exempt and non-exempt) are eligible for holiday pay. Holiday pay will be based on the employment status of the employee, i.e., full-time employees will be credited with 8 hours of holiday pay and part-time employees will be credited with 4 hours of holiday pay, per holiday. Please visit [http://www.wsu.edu/forms2/ALTPDF/BPPM/60-76-2.pdf](http://www.wsu.edu/forms2/ALTPDF/BPPM/60-76-2.pdf) for University Holidays.

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.

6.2 Annual Leave

**WSU Policy**
Annual leave must be earned before it is used. All regular status employees are eligible to accrue Annual Leave time. Annual Leave hours accrue on a monthly basis.

Civil Service Employees hired before the 15th day of the month begin to accrue vacation starting with the month they were hired in. Civil Service Employees who begin employment on or after the 15th day of the month begin accruing vacation the month following the date of hire.

Administrative Professionals will begin Annual Leave accrual on a prorated basis the first month of hire.

**Student Financial Services Guidelines**
Employees are expected to confer with their supervisor beforehand if there is a need to be out for an appointment that comes up unexpectedly, to ensure that the needs of the operation are covered.

Student Financial Services will issue a planned leave calendar three times a year. The purpose is to assist in anticipating possible staffing challenges. Staff will submit any planned leave for business travel and annual leave.

- Fall (September – December) request due mid-August
- Spring (January – April) request due mid-December
- Summer (May – August) request due mid-April

Preliminary review and approval will be done by the immediate supervisor. Final review and approval will be completed by the Student Financial Services Steering Committee.

Planned leave moratorium periods, the week before, during, and after each semester begins. It is understandable that lifetime events may occur during peak times. Consideration to honor these events will be given by the employee’s supervisor.

Staffing needs of Student Financial Services should be taken in to consideration when planning leave. Popular annual leave dates will need to be shared. As long as the operational needs are covered, such request should be possible. Please refer to section 4.3.
6.3 Sick Leave

**WSU Policy**

Sick leave must be earned before it is used. (WAC 357-31-140). The supervisor must allow the employee to use accrued sick leave for the reasons specified below, in accordance with WAC 357-31-130:

- Illness, disability, or injury that has incapacitated the employee from performing required duties;
- Exposure of the employee to a contagious disease which might jeopardize the health of others if the employee was present at work;
- Care for a minor/dependent child with a health condition requiring treatment or supervision;
- Care for a spouse, parent, parent-in-law, or grandparent of the employee who has a serious health condition or emergency health condition;
- Family care emergencies (WAC 357-31-290, WAC 357-31-295, WAC 357-31-300, WAC 357-31-305);
- Personal health care appointments;
- Family members' health care appointments when the presence of the employee is required if arranged in advance with the employing official or designee;
- Care for members of the employee's household or relatives of the employee/employee's spouse who experience an illness or injury, not including situations covered above. The employer must approve up to five days of accumulated sick leave each occurrence. Employers may approve more than five days. For purposes of care for household members or relatives, the term "relatives" is limited to spouse, child, grandchild, grandparent or parent.

The supervisor must also allow the employee to use accrued sick leave for the reasons specified below:

- For an employee whose spouse is a member of the military who has been notified of an impending call or order to active duty or who has been deployed. See also above.
- To care for a spouse, son, daughter, parent, or next of kin who is suffering from a serious illness or injury arising from injuries incurred in the line of duty in the armed forces of the U.S. See above for definition of the term "next of kin." (WAC 357-31-525)
- To recover from and cope with the effects of domestic violence, sexual assault, or stalking. See also below.

An employee may use sick leave as specified below, in accordance with WAC 357-31-130:

- Bereavement or condolence;
- Inability to report to work due to inclement weather, in accordance with the employer's policy on inclement weather (see above and WAC 357-31-255).

If an employee who is on approved annual leave were to have a condition arise that would be eligible for sick leave use under WAC 357-31-130(1), WSU may allow the employee to use sick leave in place of annual leave. The employee may request to adjust their leave balances by calling the supervisor notifying him or her of the need for sick leave. The employee may contact the supervisor with this request at the time the condition arises or upon her or his return from leave.

The University may require medical verification or certification of the reason for sick leave use upon the employee’s return to work.

**Student Financial Services Guidelines**

Student Financial Services follows the above university policy. Please refer to section 4.3. In addition, sick leave and unplanned annual leave are tracked on the Student Financial Services Daily Staff Schedule on Outlook. Supervisors are encouraged to use this calendar to track planned and unexpected employee leave. This allows for a streamlined area for staff to reference and eliminates unnecessary emails being sent out. Staff are encouraged to check the Daily SFS Staffing calendar each day.
7 EXPENSES

7.1 Office Supplies, Other Expenditures

**WSU Policy**
http://public.wsu.edu/~forms/HTML/BPPM/70_Purchasing/70.08_Purchasing_Card.htm

**Student Financial Services Guidelines**
Only authorized persons may purchase supplies for the office. No employee whose regular duties do not include purchasing may incur any expense on behalf of the office.

7.2 Travel Expense Reimbursement

**WSU Policy**
Under ordinary circumstances, it is the policy of the University to reimburse authorized travel expenses on the basis of actual expenses involved (transportation, hotel accommodation, meals, and limited incidental). Per Diem meal rates may be changed or altered by area Vice Presidents. The office of Student Affairs and Enrollment currently uses federal per diem rates for meals while employees are on travel status. For more information please visit http://public.wsu.edu/~forms/HTML/BPPM/95_Travel/95.01_General_Travel_Policies.htm.

**Student Financial Services Guidelines**
Student Financial Services follows the above university policy.

8 EMPLOYEE COMMUNICATIONS

8.1 Staff meetings

**WSU Policy**
Departmental discretion for staff meetings.

**Student Financial Services Guidelines**
In order to keep the communication channels open, Student Financial Services implements an every other week staff meeting. Staff meetings are sent to all office employees via meeting request on outlook calendars.

Employees are expected to attend and actively participate in all unit or departmental staff meetings.

8.2 Email

**WSU Policy**

**Student Financial Services Guidelines**
Email is one of the office’s primary methods for communication. New employees will be issued a WSU network identification. Your WSU email address is always younetworkID@wsu.edu.

It is important to frequently check email as new information is continually being sent out to staff.

Very limited usage of WSU email is allowed for personal use, it is expected that such messages would be short and limited in number. Employees are encouraged to refrain from using WSU email for personal use.

Email is stored on a server. The amount of storage space available is limited on the server. Therefore, employees are encouraged to save emails that are intend for reference by creating folders on the hard drive, which are identified in Outlook as “Personal Folders”.

Effective: 06/16/2015
SFS Signature Format:
SFS strives to convey professionalism, continuity and consistency and by presenting a similar signature branding, which supports office unity. The following examples of SFS Signature Branding is what staff will be asked to use with the exception of your name:

SFS will provide scripted tag lines for staff to use throughout the year supporting a variety of initiatives. Any other tag line requests from other constituents must be reviewed, vetted and approved by the Management Team beforehand.

8.3 Staffing Calendar

WSU Policy
Departmental discretion for staffing calendars.

Student Financial Services Guidelines
Internal daily staffing calendar, found on Microsoft outlook, has been created for tracking of staff not at work for any reason: sick leave, annual leave, late arrival. Supervisor (Office Manager as back up) is responsible for updating calendar for unexpected leave. This will be used in place of sending a list serve email to all staff. Student Financial Services employees should check the Staffing Calendar on a daily biases.

All staff should have access to the Staffing Calendar, if not contact the Office Manager.

8.4 Calendar

WSU Policy
Departmental discretion for calendars.

Student Financial Services Guidelines
Employees are responsible for keeping their calendar updated. Calendars are reference availability for appointments and meetings. Employees should remember to mark any approved time off on their calendars.

Employees are to give all office employees access to your calendar on Outlook. This includes full time staff, graduate assistants, and the front desk work-study students.
8.5 Workflow Information Form

**WSU Policy**
Departmental discretion for calendars.

**Student Financial Services Guidelines**
The Workflow Information Form is a tool developed to help staff track what they have accomplished and for management to evaluate allocation of resources and time. This tool may be used to track employees approved overtime hours. Occasionally, the management team or specific division of the operation may request their staff to use this online form to track their workload. This data can be compiled and analyzed to assist with developing efficiencies in various areas of the operation. The link to this online form is: [https://finaid.wsu.edu/workflow-information-form](https://finaid.wsu.edu/workflow-information-form).

8.6 Internal/External Committees

**Student Financial Services Guidelines**

**Internal**
There are several SFS internal working teams that represent a cross section of the operation. The management and administrative team work together coordinate these teams. Guidelines and protocols will be developed and maintained by team leads. Staff involvement is encouraged on these internal teams to support cross training and teamwork across divisions.

**External**
Procedure to request becoming a member of an external committee:
1. Advise your immediate supervisor and/or Assistant Director
2. The Assistant Director will advise the Associate Director
3. The Associate Director will advise upper management and a decision will be made

8.7 Communications Closing Statement

Successful working conditions and relationships depend upon successful communication. It is important that employees stay aware of changes in procedures, policies, and general information. It is also important to communicate ideas, suggestions, personal goals, or problems as they affect your work and the office in general.
9 Safety

9.1 Campus Safety

WSU campus safety information can be found at http://safetyplan.wsu.edu
Safety Policies and Procedure manual can be found at http://public.wsu.edu/~forms/manuals.html#PDF

Student Financial Services Guidelines

Keep both the northeast and the west employee entrance doors closed and locked at all times. Do not “prop” them open. Use your keys. Keep the southwest door, going immediately from the reception area into the employee work spaces closed and locked.

Follow the procedures for the scenarios listed below:

1st Scenario: Active shooter in the building or active shooter on campus. Notification should begin from the WSU Emergency systems, however, be alert to your surroundings as we could always be the first engaged in the situation. Clear the front and hallway areas, including customers, and shut the door behind the “front desk” which leads to the employee work spaces. Employees stationed at Windows 1-4 should exit either through the lobby, going through the door behind the “front desk” area or through the east door to employee work spaces. Be sure to shut this door as well. Staff should meet away from the front of the office in the closest office without windows. Office doors should be locked at all times so the door immediately locks when closed.

2nd Scenario: A customer is agitated and a person at a window needs a manager. Use the phrase “(name of person in close proximity), could you get me a glass of water?” The co-worker should let the person at the front desk know that – you are “getting a glass of water for...” as you are going to get a manager. This will also alert the front desk staff to the possible need for security or police.

3rd Scenario: A customer becomes agitated quickly or there is a situation happening where NON-EMERGENCY security is needed. Ask a co-worker or front desk receptionist for “one of our 49B Forms”. Upon hearing this, the co-worker should immediately get out of listening distance to the situation and call Campus Security at 335-8548, as well as give an alert to the Assistant Vice President or Associate Directors unless they are already involved.