Financial Aid Work Study
Web Application Documentation

User Guide
1.0 Introduction

Purpose of Manual
1.1 This manual is designed to aid users of the Work Study web application. These instructions will guide you through the process of submitting, and viewing work study requests as your assigned user role allows.

Conventions Used in This Manual
1.2 The following conventions are used in this manual:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attention</td>
<td>Indicates a warning or important information concerning the application.</td>
</tr>
<tr>
<td>Bold type</td>
<td>Bold text denotes an actionable item, such as a link or button</td>
</tr>
<tr>
<td>Footnotes</td>
<td>Footnotes give additional information about the text referenced.</td>
</tr>
<tr>
<td>Italic type</td>
<td>Italic text denotes the name of an application, screen, or table within the application.</td>
</tr>
<tr>
<td>Link</td>
<td>Indicates a link to a specific page within the application.</td>
</tr>
<tr>
<td>Note</td>
<td>Indicates convenient or useful instructions for using the application.</td>
</tr>
</tbody>
</table>

Abbreviations Used in This Manual
1.3 The following abbreviations are used in this manual:

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APP-TR-WorkStudy-PCRCreators</td>
<td>Administrative Assistant</td>
</tr>
<tr>
<td>Workstudy Admin</td>
<td>Admin</td>
</tr>
</tbody>
</table>
2.0 Site Location and Login

Site URL: https://tim.txstate.edu/workstudy

2.1 To enter the site, enter your NetID and PASSWORD in the fields provided (Figure 2-A).

2.2 After you successfully login, you will see the main Financial Aid Workstudy screen (Figure 2-B).

Your name will be listed in the top right corner of the screen. To log out of the application, click the Logout link.

* Texas State provides each of its authorized users with a computer account, known as a NetID. This provides access to the university's information resources. You are the only authorized user for your NetID and password. Your password should be kept secure and private. You are responsible for any actions taken with your NetID and password. You may not use your NetID and password for commercial purposes. For additional rules and regulations related to your NetID and password see the Appropriate Use of Information Resources UPPS.
3.0 User Roles

Your available actions as a user are defined by the user role to which you have been assigned. There are different types of users within the application, which are determined by different systems:

<table>
<thead>
<tr>
<th>User Group</th>
<th>Description</th>
<th>Role set by</th>
</tr>
</thead>
<tbody>
<tr>
<td>APP-TR-Workstudy-PCRCreators</td>
<td>PCR Creators</td>
<td>Role Manager</td>
</tr>
<tr>
<td>Workstudy Admin</td>
<td>Application Administrator</td>
<td>Role Manager</td>
</tr>
</tbody>
</table>

3.1 Roles are assigned either automatically, or by the application administrator.

1. *Automatically* – information is pulled from Banner records and assigned
2. *Role Manager* – role is assigned by an application administrator
4.0 Submitting a New Request

4.1 From the Main Financial Aid Work Study Home page, click the Submit New Request button to start a new federal financial aid work study request (Figure 4-A).

4.2 The Federal Work Study Authorization Submission page will open. (Figure 4-B).

Enter a student’s Texas State ID or NetID and press Validate.

4.3 If the ID number or NetID is valid, the student’s name will show above the ID field (Figure 4-Ca).

Review the information to make sure you have entered the correct Student ID.

If you have entered the ID of the wrong student, click the Change Student button to return to the Submission page, and re-enter the correct ID.

If you have entered an invalid ID, you will get an error (Figure 4-Cb).

4.4 Choose a start date using the calendar (Figure 4-D).
4.5 In the Academic Year section you can see all available funds for the student (Figure 4-E).

Under Term Options, select which Term the student will be working.

4.6 There may be one or more Certification Statements. You must check these before proceeding (Figure 4-F).

4.7 In the Account Manager Information section, enter the NetID of the person who will be the Account Manager (Figure 4-F).

4.8 Click Validate after you enter the Net ID.

4.9 The following information will show in the Account Manager Information area (Figure 4-G).
   - Manager Name
   - Title
   - Department

4.10 You can add additional people to the Communication Recipients using their NetID (Figure 4-H).

4.11 When you are done click Submit Application (Figure 4-I).

4.12 If the work study authorization request is in order, you will see a confirmation Screen (Figure 4-J.)

4.13 If the submission was unsuccessful, you will see an error screen (Figure 4-K). Please fix all errors, and try to submit again.
5.0 Viewing Existing Requests

5.1 To view all pending requests, click the View Existing Requests button (Figure 5-A).

5.2 All requests will be shown in the table (Figure 5-B).

View Work Study Authorizations

Application Filters:

<table>
<thead>
<tr>
<th>Student ID:</th>
<th>Department:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select Department...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Authorization Start:</th>
<th>Authorization End:</th>
</tr>
</thead>
</table>

Clear Filters  Apply Filters

Figure 5-B. Request Table
5.3 To search for a particular request, use the Application Filters controls (Figure 5-C).

![Application Filters](image)

View Work Study Authorizations

**Application Filters:**

- **Student ID:** [Input Field]
- **Department:** [Dropdown]
- **Authorization Start:** [Calendar]
- **Authorization End:** [Calendar]

5.4 You can search using:

- Student ID — enter A# or NetID
- Department — use dropdown to select Department (Figure 5-D)
- Authorization Start — use calendar to select a start date
- Authorization End — use calendar to select an end date

Click the **Apply Filters** button when all search parameters are entered.

![Department Dropdown](image)

5.5 To clear filters, click the **Clear Filters** button (Figure 5-E)

![Clear Filters](image)

5.6 Use the Page Navigation and Size Parameters at the bottom of the table to move through multiple pages, or change the number of records you can see on the screen.

![Page Size](image)
6.0 Querying an Existing Report

6.1 To query an existing financial aid work study request, click the Query Existing Request button on the main Financial Aid Work Study Home page (Figure 6-A.).

6.2 The Financial Aid Work Study Query page will open. Enter a Student ID in the search box. You can either use an A# or NetID (Figure 6-B).

6.3 Review the student information. If incorrect, use the Change Student button to return to the Query page (Figure 6-C).

**NOTE:** Make sure the correct Academic Year is selected. Use the drop-down menu to change the year if incorrect.

6.4 From here you can view the following (Figure 6-D):
- Student Award Amount
- Amount Earned
- Remaining Balance
- Payroll Activity

All amounts are divided by semester.