Student Employee Policies and Procedures Manual

“Engaging Students, Ensuring Success”
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Our VP Area: Diversity and Inclusion

Mission
To ensure equitable access for all, the Office of Diversity and Inclusion (ODI) provides leadership by working collaboratively with the University community to identify and overcome institutional barriers and affirm the dignity, value, and uniqueness of each member of our community.

Vision
Western Michigan University will be a leader in the area of diversity and multiculturalism by fostering an environment where diversity in all its forms is investigated, explained, practiced, celebrated, affirmed, and vigorously pursued.

Diversity and Multiculturalism Action Plan (DMAP)
The DMAP was adopted by the Board of Trustees in 2006. It is the strategic plan for the University as it relates to diversity and inclusion.

Location
Adrian Trimpe Building
For more information, visit the ODI website at www.wmich.edu/diversity.

Our Focus

The Division of Multicultural Affairs (DMA) serves as an information resource on the role and value of diversity in education for Western Michigan University and the greater Kalamazoo communities. DMA provides:

- Scholarship information
- Academic progress monitoring
- Mentor and peer mentor programs
- Networking opportunities
- One-on-one tutoring
- Events and programs that promote cultural awareness

DMA strives to ensure that all students are given the full opportunity to discover and develop their talents, interests, and unique potential, and to provide a learning-centered environment that presents the context for intellectual, cultural, professional, and personal growth during the college experience. Through programs, services, and initiatives that address cross-cultural competency and personal empowerment, DMA fosters community development, leadership, and a campus climate that respects and appreciates the history, culture, and traditions of all students.
**Programs**

**College Assistance Migrant Program**
The purpose of the Western Michigan University College Assistance Migrant Program (WMU CAMP) is to provide academic and financial support to assist migrant and seasonal farmworkers, or their children, in successfully completing their first undergraduate year at the University and continuing in their post-secondary education. The program provides students with academic assistance, tutoring, career counseling, financial assistance, mentorship, and personal development. Program participants also receive follow-up services after successful completion of their first year.

WMU CAMP is federally funded by the U.S. Department of Education's Office of Migrant Education.

**Martin Luther King Jr. Student Scholars Academy**
The Martin Luther King Jr. Academy is a four-tier comprehensive program designed to offer academic, social and professional development services that assist program participants from their first year at Western Michigan University through graduation. Each tier is designed to address particular developmental milestones associated with that phase of a student's matriculation. The program has specific student learning outcomes and coordinates student engagement opportunities.

**Mentoring for Success Program**
The Mentoring for Success Program is a peer mentoring program designed to promote program participants' success at Western Michigan University through increased acceptance rates into participants' intended majors and increased college graduation rates. The program is geared toward achieving specific academic and developmental goals that are focused on participants' overall development. Peer mentors provide undergraduate students in the target population academic support through one-on-one and small-group mentoring sessions, during which they may tutor, facilitate discussions, help students locate resources, and promote academic and life skills development.

The program strives to ensure that all program participants are given the full opportunity to discover and develop their talents, interests, and unique potential, and to provide a learning-centered and student-centered environment that presents the context for intellectual, cultural, professional, and personal growth during the college experience. Program participants will learn to become an independent, confident learners and develop good study habits and time management skills that will enhance their education and college experience, as well as to enable them to achieve a post-secondary degree. Funding for this program is provided by the State of Michigan Workforce Development Agency's King-Chávez-Parks Initiative and the Division of Multicultural Affairs.
Events/Programming

DMA offers cultural programming throughout the year to bring awareness to the rich cultures that are part of our campus community. These programs are an integral part of the college experience and provides an opportunity for students coming from outside the campus to feel a sense of belonging on our campus as well as assist with the Office of Diversity and Inclusion’s mission of the University.

Annual Commemorative Events

- Black History Month
- Cesar Chavez Birthday March
- Hispanic Heritage Month
- Kwanzaa
- MLK Birthday Celebration
- Native American Heritage Month

Additional events and programs held throughout the year are posted on DMA’s website at http://www.wmich.edu/multicultural/events.

Student Organization Support

DMA supports many WMU student organizations. A complete list can be found on our website at http://www.wmich.edu/multicultural/student-organizations.
WMU Student Employment Policies

1. As a general rule, you are **not permitted** to work more than the maximum number of hours your supervisor has indicated. Any exceptions must be justified to and pre-approved by your supervisor. **NOTE:** Violation of this policy may result in immediate termination without notice.

2. Additionally, you must abide by the employment policies set forth by Career Student and Employment Services (CSES), the University, the Department of Homeland Security (DHS), the Fair Labor Standards Act (FLSA). DMA does not have the authority to make exceptions for you.

<table>
<thead>
<tr>
<th>Enrolled Student Type</th>
<th>Minimum Credits to be Enrolled by Time of Year</th>
<th>Hours Allowed to Work Per Week (All Jobs Combined)</th>
<th>FICA Exempt*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Student</td>
<td><strong>Fall/Spring:</strong> Enrolled in at least 6 credit hours and hold no faculty or staff positions. <strong>Summer I/II:</strong> Enrolled in at least 3 credit hours and hold no faculty or staff positions.</td>
<td>25</td>
<td>Y</td>
</tr>
<tr>
<td>International Undergraduate Student**</td>
<td><strong>Fall/Spring:</strong> Enrolled in at least 6 credit hours and hold no faculty or staff positions. <strong>Summer I/II:</strong> Enrolled in at least 3 credit hours and hold no faculty or staff positions.</td>
<td>20 hours per federal law</td>
<td>Y</td>
</tr>
<tr>
<td>Graduate Student</td>
<td><strong>Fall/Spring:</strong> Enrolled in at least 3 credit hours and hold no faculty or staff positions. <strong>Summer I/II:</strong> Enrolled in at least 2 credit hours and hold no faculty or staff positions.</td>
<td>25</td>
<td>Y</td>
</tr>
<tr>
<td>International Graduate Student**</td>
<td><strong>Fall/Spring:</strong> Enrolled in at least 6 credit hours and hold no faculty or staff positions. <strong>Summer I/II:</strong> Enrolled in at least 2 credit hours and hold no faculty or staff positions.</td>
<td>20 hours per federal law</td>
<td>Y</td>
</tr>
<tr>
<td>Graduate Assistant***</td>
<td><strong>Fall/Spring:</strong> Enrolled in at least 6 credit hours and hold no faculty or staff positions. <strong>Summer I/II:</strong> Enrolled in at least 3 credit hours and hold no faculty or staff positions. Must be enrolled in 3 credit hours to perform assistantship.</td>
<td>20 hours per week. May work 5 additional hours in a student job.</td>
<td>Y</td>
</tr>
<tr>
<td>International** Graduate Assistant***</td>
<td><strong>Fall/Spring:</strong> Enrolled in at least 6 credit hours and hold no faculty or staff positions. <strong>Summer I/II:</strong> Enrolled in at least 3 credit hours and hold no faculty or staff positions. Must be enrolled 3 credit hours to perform assistantship.</td>
<td>20 hours per federal law</td>
<td>Y</td>
</tr>
</tbody>
</table>

*Enrolled student employees are FICA-exempt, unless they hold a staff position, in which case all earnings are taxed. FICA is the combined Social Security tax and the Medicare tax of 15.3%. Employees pay half and employers pay the other half. Source: [Requirements for FICA tax exemptions](#). **International student requirements** ***Graduate College requirements***

3. Keep in mind that the hours you work for DMA and for your other on-campus jobs will add up to your total hours worked on campus. You may not work more than eight (8) hours a day for all your on-campus jobs combined without prior approval from your supervisor.
4. You may not volunteer to work without pay. According to the FLSA, a person cannot be both a paid employee and an unpaid volunteer performing essentially the same type of work for which he or she is regularly employed. Please refer to the FLSA website (http://webapps.dol.gov/elaws/whd/flsa/docs/publicvol.asp) for more information.

5. Upon hire, you should have completed a WMU Student Employment Eligibility Form. If you have not, please see Appendix A. Complete and return the form to your supervisor within seven (7) days of your start date.

Non-Enrolled Students (including international students)
Non-enrolled students (including international students) may work 39 hours per week in summer I and II sessions if enrolled in the immediate past spring semester or eligible to enroll in the upcoming fall semester. If graduated, students must have been accepted in a WMU degree program in the upcoming fall semester.

FICA tax applies to all earnings; employing department and student will be responsible for these costs.

Reporting Time

Time Sheet Policies
1. Time sheets will be provided by your supervisor.
2. Time sheets are generally due to the DMA Timekeeper by 5 p.m. every other Wednesday. Your supervisor may ask that you submit it to them before the DMA deadline in order to allow for review and approval. Please follow your supervisor’s direction. Your supervisor will notify you of any changes to the due date for and/or policies regarding time sheets.
3. You must submit all time sheets before the deadline and make sure that your time sheets contain minimal error (or ideally, no error) before submitting them.
   a. Failure to submit time sheets in a timely manner may result in disciplinary action. You will be written up if you submit late time sheets two (2) times in a row or more than three (3) times in a semester.
   b. Time sheets received after the deadline may not be processed until the next payroll cycle and you will then be paid in the next payroll cycle.
   c. Time sheets must be signed by your supervisor before submitting them to the DMA Timekeeper.
4. As a reminder, you may not volunteer to work any hours for free or omit any hours worked from your time sheets as this goes against FLSA guidelines. If you are worried that you may go over the number of hours you are allowed to work per week, please contact your supervisor immediately.
Paid Breaks
Under University policy, non-exempt (hourly paid) employees are entitled to take breaks as outlined below. Breaks are not cumulative:

- One (1) 15-minute break for each four (4) hours worked.
- Two (2) 15-minute breaks in a day when working six (6) or more hours, with one break during the first half of the workday and one during the second half of the workday.

Absences
If an emergency arises and/or an absence is anticipated, you must notify your supervisor before the start of your work shift. Excessive absenteeism may lead to write-ups or termination.

Closure Policy
The University is closed on the following observed holidays: Independence Day, Labor Day, Thanksgiving Day, day after Thanksgiving, one day at Christmas, one day at New Year, Martin Luther King Jr. Day, Memorial Day, and Winter Closure (period between Christmas and New Year’s Day).

University operations may be reduced, suspended or closed due to weather conditions, facility damage or other emergency conditions that prevent normal operations. In cases of complete or near complete closure or shutdown, the University’s website—www.wmich.edu—and local news media will be used under normal circumstances for notification purposes. The first notice will be posted on the WMU home page, and the University will make every reasonable attempt to notify local news media by 6 a.m. in such instances.

You are strongly encouraged to register for WMU Alerts in GoWMU to receive automated calls or text notifications regarding closures or emergencies on campus.

Work Protocol
DMA employees are expected to maintain a neat and organized work area at all times. Before you leave each day, you must clean up your area and shut down your computer. Turn off the lights and air-conditioner and close the windows before you leave.

Prevent recycling bins and trash cans from overflowing. Empty small recycling bins into the large bin in room 2310. Empty trash bins into the large garbage can in room 2286.

Refrain from disruptive congregation, idle gossip, and abusive or profane language while at work.
Keep music volume to a minimum; music should not be heard outside your office. Headphones are not allowed.

Visitors are prohibited at all times.

Keep purses, personal computers, and other personal items out of sight in a file drawer or cabinet. DMA will not be held responsible for any personal items lost, stolen, or damaged.

While on the clock, your time should be dedicated to your job duties. Please refrain from extended non-essential communication with your co-workers.

**Dress Code**

DMA asks that you dress appropriately and sensibly, in business casual attire. Always wear clean, modest, and casual clothing. Clothing items that are not acceptable to wear when working include, but are not limited to:

- Items with controversial, disrespectful, or vulgar language or graphics.
- Clothing items that inappropriately reveal bare skin or undergarments, e.g., no cleavage or midriff-baring shirts or blouses, tank tops, low-slung pants, short-shorts, work-out apparel, leggings without a long top (top must hit below your hips) or miniskirts.
  - The bottom of your shorts, skirts, and/or dresses should reach your fingertips or below when you are standing.
- Torn or sagging jeans or pants.
- Hats, baseball caps, or any headgear, headwear, or headdress (unless required by your religion).
- Under no circumstances should you wear other colleges and universities' gear (t-shirts, sweatshirts, hats, etc.) to any event or activity for which you will be paid.

Your supervisor reserves the right to send you home if you are not in compliance with DMA’s dress code. When in doubt, err on the side of conservatism.

**Confidentiality**

1. In compliance with the Family Education Rights and Privacy Act (FERPA), we aim to protect the identities of our participants and information concerning individuals. This means we do not give the names, addresses, or any personal details of participants to any outside agencies, persons, or University departments without the participants’ permission.
2. When an inquiry is made verbally, by letter, by email, or by telephone about a participant, we will inform the inquirer that we do not give out information concerning our participants.

3. An inquirer may claim to know that a student is receiving services from us. We will not confirm or deny this and will explain this is our policy.

4. When an inquirer says he or she has the student’s permission to inquire, we will ask him or her to have the student verify this in writing before we give information in consultation with the student.

5. An inquirer may have a legitimate reason for requesting information, e.g., concern about the safety of a student or another person, a criminal investigation etc. In such cases, reasonable measures must be taken to verify the authenticity of such a query (e.g., verify police identity by asking for rank and number, calling the appropriate station, etc.).

6. If a parent or legal guardian request information about a student, do not give them information. We respect the adult status of our participants and do not give information unless they have granted written permission to WMU and signed a release form to release their academic or account information to a designated third party. For more information on FERPA, contact the Office of the Registrar at (269) 387-4300 or visit http://www.wmich.edu/registrar/policies/ferpa.

7. If you are ever in doubt, please contact your supervisor and ask for further directions.

**W-Exchange Email**

All of your work-related email communications must come through your assigned W-Exchange account. Set up your W-Exchange email signature using the following template:

```
[Your full name – please include both first and last names]
[Job title]
[Your program/unit]
Division of Multicultural Affairs
Western Michigan University
Website: [Your unit’s]
Phone: [Your office phone number; use this exact format -> (269) 387-XXXX]
```

The parts in parentheses are meant to serve as prompts and reminders. Please personalize the parts within parentheses as applicable or omit if not applicable. Please do not include the parts in italics.

*Personal phone numbers should not be included in your email signature.*

See Appendix B for a W-Exchange tutorial on how to use additional email features.
W-Exchange Calendar

You must give your supervisor view access to your W-Exchange work calendar.

Items that must be posted on your calendar are:
- Work schedule
- Work-related meetings
- DMA event and programs
- Others as required by your supervisor

You must also post your work schedule on your unit’s calendar; see your supervisor for assistance.

See Appendix C, for a W-Exchange calendar tutorial.

General DMA Office Procedures

Mail
For off-campus mail: See your supervisor for a mail card form and secure the form to outgoing mail with a rubber band or paper clip. Place it in the “Off-Campus Mail” box located in the DMA main office in room 2260 or take it downstairs to Ellsworth dock area located on the first floor.

Always indicate your unit’s mailing address on off-campus mail:
  Western Michigan University
  [Program Name]
  1903 W. Michigan Avenue
  Kalamazoo, Michigan, 49008-5233

For on-campus mail: Place it in yellow on-campus mail envelopes. Write in mail stop code, department, and person to whom the mail needs to go. Place it in “On-Campus Mail” box or take it downstairs to Ellsworth Dock area located on the first floor.

Printing and Duplicating
The DMA copier/printer is located in room 2310. In order to use the machine, you will need a username and password. See your supervisor for log in info.

The DMA Administrative Assistant Senior will need to add the DMA copier/printer to the computer you are using. Send an email with your name and work times to schedule a time to have it installed.
DMA Printers/Copiers should not be used for personal use.

Printouts with confidential information must be picked up immediately.

Should the machine need service, email the DMA Administrative Assistant Senior with the specific error code and describe the problem you are experiencing.

**Shredder**
There are two shredders in DMA, one in room 2260 and one in room 2310. If full, dump contents into plastic bag and then place in the large recycle bins. Plastic bags are located in room 2260.

*(NOTE: Before submitting a Bronco Fix-it or Tech/Computer ticket, speak with your supervisor.)*

**Bronco Fix-It**
If there is something that requires custodial services to fix or clean, complete a WMU Bronco Fix-It request online at [http://broncofixit.fm.wmich.edu/request_bldg.html](http://broncofixit.fm.wmich.edu/request_bldg.html) and forward request to DMA Administrative Assistant Senior. NOTE: The system has us under “Division of Minority Affairs” rather than “Division of Multicultural Affairs.”

**Technical or Computer Issues**
If you are experiencing computer issues, complete an ODI portal request at [https://odi-helpdesk:9676/portal](https://odi-helpdesk:9676/portal).

**Phone Procedures**
When answering the office phone, use the following transcript:

“Good (morning or afternoon), (your unit’s name). (Your name) speaking. How may I help you?”

**Communication**
Always ask your supervisor or co-workers if you have questions or are uncertain about any particular item!

**Emergency Procedures**

Western Michigan University is committed to the safety and security of all persons. That is why WMU has created procedures with the goal that WMU employees will be prepared to make safe choices should an emergency occur. Review the procedures located at
Ellsworth Tornado Emergencies
Ellsworth Hall tornado shelter area is located in the garden/basement level in the CELCIS office space. That area is only accessible through the Southeast stairwell.

Ellsworth Fire Evacuation
Ellsworth assembly area is located across the street toward the Student Recreation Center. If the fire alarm is activated, leave the building immediately and report to our designated assembly area.

Drills
Unannounced tornado and fire drills are conducted periodically throughout the year. Participation is mandatory. If you do not comply, you could be fined and/or terminated from employment.

Payroll and Tax Information

Payroll Choices
The Payroll Choices Program is WMU’s payroll system that gives you the option to receive your pay via direct deposit or on a Visa® Payroll Card with Pre-Check® option. This program will provide you with flexible, convenient, and secure ways to access your pay eliminating the need to issue paper checks. All new employees are required to enroll in Payroll Choices Direct Deposit or Payroll Choices Pay Card.

Direct Deposit
Please register for direct deposit in person in the Payroll office, room 1270 Siebert Administration Building, Monday through Friday, 8 a.m. to 5 p.m. Picture identification is required. If you have questions, call (269) 387-2935.

I-9 Verification
All new employees will receive an email from Human Resources with detailed instructions for Form I-9 completion. On or before your first day of employment, take your original, unexpired documents to Human Resources for verification. For details about accepted documents, see the U.S. Citizenship and Immigration Services, Accepted Documents.

W4 Tax Withholding
All new Western Michigan University employees are automatically added to the Payroll System with a marital status of single and with zero (0) exemptions. If this is how you want to be taxed for both federal and state income taxes, you do not need to do anything.
If you want to change your marital status, number of exemptions, or have an additional amount of tax withheld, you may do so online through Employee Self Services in GoWMU. More information can be found online at http://www.wmich.edu/payroll/payroll/mypay/tax-information.

**Disciplinary Action and Performance Improvement Plan**

1. Failure to comply with the guidelines and expectations stated in this Policies and Procedures Manual may result in disciplinary action including termination of employment with or without warning.
2. All write-ups will be done by your supervisor.
3. Depending on the type of infraction, a follow-up meeting with your supervisor and DMA Director may be necessary to complete an improvement plan.
4. All disciplinary reports and any improvement plans that have been put in writing will be kept on file for the duration of your employment. They will be kept in a confidential and secured location and only be made available to authorized individuals as deemed appropriate by your supervisor.

**Types of Problem or Violation**

1. **Tardiness:** Employee does not call to notify the office prior to being tardy and arrives five or more minutes after scheduled time or the employee calls to notify the office prior to being tardy and arrives fifteen or more minutes after scheduled time.
2. **No-show/No-call:** Employee does not arrive during shift without communicating with supervisor prior to failure to show.
3. **Absenteeism:** Employee has three or more absences. Family emergencies and medical issues do not count toward absences.
4. **Underperformance:** Employee does not demonstrate attitudes, knowledge, and skills that enable employee to aspire to and wisely apply the principles of excellence, accountability, and altruism to meet the needs of the department. Employee does not maintain a level of ethical, legal, and moral conduct. Employee is unable to follow and adhere to this Policies and Procedures Manual as well as other written or verbal guidelines.
5. **Documentation:** Employee does not maintain clear and consistent documentation. Documentation is not provided in a timely manner and often contains errors.
6. **Communication:** Employee does not maintain consistent or effective communication through email, telephone, or forum participation, or in person. Employee does not use proper grammar, spelling, or punctuation in written correspondence or appropriate language to communicate with staff and students.
7. **Insubordination:** Employee willfully and defiantly refuses, either explicitly or implicitly, to obey a supervisor’s lawful, ethical, and reasonable orders.

**Consequences/Actions to be Taken**

1. **Verbal Warning:** Verbal statement to employee that the violation of a rule or regulation may not continue. Written documentation by director or supervisor of having given a verbal warning does not constitute a written warning.

2. **Written Warning:** Formal notification in writing to employee that a rule or regulation has been violated.

3. **Suspension:** Loss of work and wages for a specific number of hours or days, but not for more than one work week, depending on the severity of the offense. Notice of suspension is provided to the employee in writing.

4. **Review of Performance:** A formal discussion about an employee’s progress and performance as well as future in the department.

**Termination of Employment**

1. If you decide to resign from your position, it is helpful to give your supervisor as much notice as possible. You are expected to give at least **two weeks’ notice** in writing.
   a. Submit a written resignation notice via email or Word document to your supervisor.
   b. Include the date of your last day of employment in the letter.

2. Job abandonment occurs when you fail to notify your supervisor of the reason for absence for three (3) consecutive instances or fail to show up when directed to do so. You will be considered to have voluntarily resigned.

3. Failure to comply with the guidelines and expectations stated in this Policies and Procedures Manual may result in disciplinary action including termination of employment with or without warning. Reasons for termination may include, but are not limited to, unsatisfactory work performance, off-duty misconduct, insubordination, willful disregard of instructions, and/or blatant violation of policies and procedures, sexual harassment or advances, fighting, supplying drugs and/or alcohol to participants, possession of drugs or under the influence.

Remember to revoke calendar share access after your last day of work and turn in any keys.

**Additional Training**

Employees must complete the following training programs within seven (7) days of their start date unless otherwise noted. You supervisor will provide you with additional
information regarding the training programs below:

- Individual program training
- Online Security Awareness Training – “WMU IT Security Education Program for Student Employees”
- “Preventing Discrimination and Sexual Violence: Title IX VAWA and Clery Act for Undergrads and Graduate Students”
- “Unlawful Harassment Prevention for Higher Education Student Employees”
- Safe on Campus Training
- Disability Ally Training
- Student Concern Form Training
- On-going professional development during a fall and spring mandatory student employee training session. Your supervisor will provide you with the dates.
Appendix A: WMU Student Employment Eligibility Form

WMU STUDENT EMPLOYMENT ELIGIBILITY FORM

(Complete for every hire; make a copy for the student and a copy for department.)

Student Name and WIN: ____________________________
Department: ______________________________________
Job Title: ________________________________________

In order to be and remain eligible for student employment at Western Michigan University, a student must be:

☐ Enrolled, in good standing, at least half time throughout the semester(s) and/or session(s) of employment.
   a. Half-time undergraduate: 6 hours fall or spring, 3 hours summer I or II
   b. Half-time graduate: 3 hours fall or spring, 2 hours summer I or II

☐ Possess U.S. employment eligibility documentation (i.e. social security number or similar)

☐ Working no more than 25 hours a week/50 in a pay period for all WMU employment positions combined in fall and spring semesters, during breaks and periods of non-enrollment. Non enrolled student employees may work a maximum of 39 hours a week/78 per pay period during summer I or summer II sessions only (if enrolled the previous semester and eligible to enroll follow fall semester).
   a. Jobs in an American Federation of State, County and Municipal Employees (AFSCME) staffed operation, are limited to a maximum of 20 hours per week, in accordance with the regulations set forth in article 1.1.3 of the 2009-2012 AFSCME / WMU Agreement.
   b. International students work a maximum of 20 hours per week during mandatory enrollment periods, due to immigration regulations.

☐ Responsible for reporting all campus jobs to all supervisors. Identify the department(s), supervisor(s), and the number of hours worked in each job.

☐ Able to prove a Federal Work-Study award at the point of hire (where applicable). Notify supervisor immediately if Federal Work-Study award has changed or been eliminated.

*List additional job(s) held on campus:

<table>
<thead>
<tr>
<th>Position and Department</th>
<th>Supervisor Name and Phone</th>
<th>Average hours per week</th>
<th>Utilizing Federal Work-Study Award</th>
</tr>
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<tbody>
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</tbody>
</table>

Do you presently hold a Graduate Assistantship? Yes ___ or No ___.

I, __________________________________________ have read and agree to abide by these requirements.

(Print student name)

Student Signature ____________________________ Supervisor Signature ____________________________

Date ____________________________ Date ____________________________
Appendix B: W-Exchange Email Tutorial

This tutorial will demonstrate how to utilize the additional features of the W-Exchange email.

Creating a Filter:

1. It is often useful to create a filter to file away emails from certain individuals into folders and subfolders for the sake of organization. To do so, first click the “+” sign next to “Folders” from the “Mail” tab.

2. If you would like to create a subfolder, right-click the folder created previously and click “Create new subfolder.” Click the folder in which you want to put the new subfolder. This subfolder will contain all of the emails from the filter you will create. If you do not want to put it in any pre-existing folder, you can stop after the first step.

3. To create the filter itself, click “Settings” on the upper-right corner of the mail tab, then select “Mail.” A new window like the one below will pop up with different options. Next, click on “Inbox and sweep rules” right under the “Mail” -> “Automatic processing.”
4. Once you complete the steps above, you will be taken to a window like the one below. Click the “+” sign to add a new inbox rule.

![Inbox rules screen](image)

   ![New inbox rule](image)

   ![Additional condition options](image)

   ![Add exception options](image)

   ![Save or cancel options](image)

   ![Selected exception example](image)

a. In order to set up a new inbox rule, you will have to select a condition. By clicking the “Add condition” button, you can add more than one condition to a rule. In this window, you will select a condition and an action for your rule by using the drop-down menu.

5. After you click the drop-down menu, select “It was sent or received,” then “Received from.” A new window will pop up where you can select the email address you wish to filter. You can apply the same rule to multiple email addresses by adding their email addresses as shown in Step 3. Once you are done adding the emails, click “Save.”
6. Now that the conditions are set, you can select the different folders you have created previously in this tutorial to store these emails. Start by using the drop-down menu under “Do all of the following.” Select “Move, copy, or delete” and then “Move the message to folder...” You will be shown all the default folders and subfolders plus the one you have just created. Select the one you would like to use for a particular sender, then click the “OK” button.

7. Once you complete the previous step, you will be shown a window that contains all the information related to the rule or filter you have just created. Click the “OK” button to confirm the filter you just created.

8. Finally, you will be taken to the initial window where you can turn on and off each rule you have created. You can also edit, delete, or add conditions or actions to the rule you have created. You can also organize them as you may see fit. The purpose of this tutorial is to give an overview of W-Exchange filter settings.
1. “+”: Add new rule to the ones you already have.
2. “📝”: Edit the existing rules.
4. Check the box in order to turn on or off a particular rule.

9. Once you are done with all of your changes, click “Save” to finish the process of creating a filter. Now the email address that you have selected will be filtered according to the rule you have set.

10. You have now created a filter. Emails from addresses entered into the filter will now be filed away into a single folder. Please do not forget to check this folder as emails sent from the email addresses you have filtered will no longer show up in your inbox.

Creating a Contact Group:

1. Creating a contact list is useful for emailing a large number of people quickly. To do so, first click the application “People” from the Office 365 toolbar, or you can find it by clicking on the application toolbar on the upper-left corner while on any other W-Exchange application tab.

2. This will open up the “People” app where you can manage you contacts and “Groups.” In order to create a contact group, click on the drop-down menu on “New” then click on “Contact List.”

3. You will be taken to a new window where you will create the name of your contact list and add the address emails you wish to have in your contact list. The automatic search option allows you to put in someone’s name and it will find the email address. You can add multiple email addresses at the same time before saving you contact list. Click on “Save” once you are done.
4. Once you have created a contact list, you can use it to email everyone that is on the list at the same time. You can also manage, delete, or edit your contact list in the same window. Please keep in mind that you should email your mentees separately or using the “bcc” option for privacy purpose.

5. You can also access this contact list using the email application in W-Exchange. If you want to send an email to a contact list you have created while in your “Mail” application, click “New” to start a new email and put the name of your contact list in the “To” field. In the example below, the email will be sent to all the people on the contact list named “Office Staff.”

6. The contact list will always appear in the W-Exchange “People” application. If you wish, you can create a contact by entering all the information for a single person and saving it to your account. The information of your contact will include phone number, email address,
address, and work information. You can create a contact for each of your mentees by adding them clicking “New” -> “Contact” to access the “Add contact” pop-up window. Remember to click “Save” after you are done.

Miscellaneous:

You can personalize your incoming and outgoing emails the way you want. Some of the settings presented below won’t be necessary to complete your duties as a peer mentor but you can use them in order to organize your account.

1. You can set up your email signature by going to “Settings” -> “Mail” -> “Email signature.”

2. You can change the way your emails will be handled automatically, your reading panels, and many more other options in “Settings.”
Appendix C: W-Exchange Calendar Tutorial

This tutorial will demonstrate how to create, share, and maintain a calendar.

Accessing the Calendar:

1. To access the W-Exchange calendar, you must first log in (using your Bronco NetID@wmich.edu as username and your GoWMU password) to your W-Exchange account at wexchange.wmich.edu.

2. Once logged in, click the icon labeled “Calendar” on the top row of icons.

3. Your W-Exchange calendar should pop up in a new tab. W-Exchange defaults to your app page, so you will have to click the mail icon to see your emails. Click the “Calendar” tab to access your W-Exchange calendar. Your calendar will be blank if this is the first time you are accessing it.

Navigating the Calendar’s Interface:

Now would be a good time to familiarize yourself with the calendar. The calendar menu will be covered from left to right, with each point in the list corresponding to a number in the menu below.

1. The “Search Calendar” tab allows you search all appointments or calendar items.
2. The “New” tab allows you to create a new appointment or calendar item.
3. The “Add calendar” tab will allow you to add a secondary calendar if you wish or import calendars from other locations or accounts.

4. The “Share” tab allows you to share your calendar with others (if applicable).
   a. After selecting “Share,” type the name of the person with whom you would like to share your calendar.
   b. Make sure to select “Full details” before clicking “Send.”

5. The “Print” tab will print the current calendar view.
6. The “Today” tab brings the calendar to the current date and week.

7. The week view can be changed by clicking the arrows on the menu bar.

8. You can scroll through the times of the day using the scroll bar on the right side of the screen.

9. The current month and year can be changed by use of the arrows on the min calendar in the upper left-hand side of the screen. To change the month, you can click the arrows. The highlighted week shows the week you are viewing on the big calendar.

Adding Appointments:

Now that you are familiar with navigating the calendar, let’s add an appointment. An appointment is an entry on the calendar that can be filled with additional information to detail what you plan to
do at a given time. There are two ways to add an appointment: the simpler “QuickAdd” method and the more detailed “New Appointment” method.

**QuickAdd Method**

1. Move your cursor over a time slot, click, and a window will come up for you to make a new appointment.

   a. You can also create a new appointment by clicking once on the appropriate time slot and dragging downward or upward.

2. When the “QuickAdd” appointment box pops up, you will be able to enter and modify the “Subject,” “Location,” “Start Time,” and “End Time” of your appointment.

3. The “Subject” field should contain a succinct description of the activity. Likewise, the “Location” field should include the location of the activity you are scheduling. By default, the appointment you have just created will be shown as “Busy.”

4. As you already seen, the “QuickAdd” method allows you to add a meeting time, subject, and location; however, it does not automatically allow you to modify some aspects of the new appointment you have created. This option is convenient when you need to create a one-time event that does not require repetition or too many details. If you need to add more details to your appointment, click “More details.”
5. The screen will be similar to the one you see when using the “New Appointment” method. The “Show as” option allows you to designate your availability during an appointment and whether or not those with whom you have shared your calendar can see the appointment’s details.
   a. By default, the appointment will be set to “Busy” and marked as “Public.” Generally, leave the appointment marked as “Busy.”

6. You may want an appointment to repeat on a regular basis. An appointment can be selected to repeat on a daily, weekly, biweekly, monthly, etc. basis from the “Repeat” drop-down menu. Note that a recurring appointment set up this way will continue to repeat without end unless you specify an end date or number of occasions.
   a. If you need more control over a recurring date, click the “Other…” option at the bottom of the box. This will bring up the more detailed “New Appointment” screen, which allows customization of the repetition of an appointment. This mode will be covered in “New Appointment Method” section.
7. Save and finalize the appointment by selecting “Save.”
8. Refer to the “Editing Appointments” section of this document for more information on how to make changes to your appointments.

New Appointment Method
The “New Appointment” method allows you greater control over your appointments, allowing custom appointments tailored to your needs.

1. This method can be accessed in three different ways, which are as follows:
   1.1. Click the “New” tab on the menu bar to bring up the “Details” pop-up page.
   1.2. Press the “n” and “a” keys simultaneously on your keyboard.
   1.3. From the “QuickAdd” method, click “More details.”

2. Whichever method you choose, a screen similar to the one for the “QuickAdd” method will appear. This mode allows you to invite other W-Exchange users to attend an appointment, add attachments, and customize the repetition of an appointment. You can use this when scheduling your biweekly meetings with the program director or scheduling your classes.

3. Let’s start with the custom repeat option. We will create a recurring biweekly appointment as an example. Click “Repeat” and select “Other” to customize the way in which an appointment is repeated.
a. A pop-up window will allow you to set up any repeating appointment and its duration. This is very important for setting up your biweekly appointment in the calendar.

b. To set up your biweekly appointment, select “Weekly” from the “Repeat” drop-down menu.

c. Type “2” in the “Every Week” box.

d. Select the day of the week you have your biweekly appointments.

e. Select the “End” date. This will typically be one week or two weeks before final exams week. Alternatively, you may click the down-arrow to the right of the date to pull up the drop-down calendar and select a date from the calendar.

4. W-Exchange allows you to invite other users to attend an appointment. You can do so from the “Attendees” text box. An email will be sent to each of the email addresses listed in the box if “Send Notification Mail” is selected. You can request an email response by also checking the “Request Responses” box.

5. When inviting others to an appointment, you can write a message using the text box at the bottom of the screen and add an attachment using the “Add Attachment” button.
6. Save and finalize the appointment by selecting “Save” from the calendar menu.

Editing Appointments:

There will be times when you may have to make changes to your appointments due to schedule changes or meeting cancelations. There are different procedures to make changes depending on the type of changes that need to be made.

1. If you want to change an appointment after it has been finalized, you can simply click and drag to move it to another time slot. If the appointment is part of a series (a set of repeating appointments), you will have the option to either change each appointment in the series or just this single appointment.

2. If you want to extend the duration of an appointment, move your cursor over the top or bottom border and drag upward or downward respectively. You may also shorten the duration of an appointment.

a. The increments at which the appointments are modified can be set to 15 or 30 minutes by going under “Settings” -> “Calendar” -> “Calendar appearances.”
Creating All-Day Events:

W-Exchange also provides an option to create appointments for all-day events (such as birthdays, seminars, and vacations). This feature is also useful for designating due dates on your calendar. These appointments can stretch across multiple days. All-day appointments are created in a similar manner to regular appointments.

1. Click on the appropriate day that you want to schedule the all-day appointment. The new appointment box will pop up. Click “more details.”

2. Check the “All day” box.

3. All-day appointments are configured very similarly to normal appointments, but lack specific times (since the appointments last for whole days). It should look like the one in the picture below.

Tagging Your Appointments:

In order to organize your W-Exchange calendar, you can use charms to describe your appointments or use colors to categorize different activities on your calendar.

1. If you add your appointment by using the “QuickAdd” method, you need to click “More details” to add a charm to your appointment. If you add an appointment by clicking “New,” the options should be available to you right away. In both cases, you will have a pop-up window that looks like the one below.
2. To apply a charm to an appointment that you have already added to your calendar, right-click the appointment, hover the cursor over “Charms,” and click the charm you want to apply to the appointment.

3. After applying a charm to your appointment, you can categorize it using colors. To use colors to categorize your events on your calendar, right-click the appointment, hover the cursor over “Categorize,” and pick the desired color for the appointment.

   a. You can create a category with a specific name and color by right-clicking an appointment, then hovering the cursor over “Categorize,” and finally clicking on “Manage categories…”

   b. A window will pop up to give you options to customize your colors. You have the option to delete previous categories that were created by default by clicking on the “X” and add new ones with specific titles and colors. Add the title in the box and click the drop-down menu for the color.
4. You may put all of your appointments into specific categories and add a charm on all of them if you find them helpful. An example of a calendar that used categories and charms for a better organization is shown below.

5. When an appointment is repeated, the charm or color will be applied to all the appointments in the entire series. It can be done by following the steps listed above. If you would like to add a charm or categorize only one instance on the series, you can right-click the appointment, click “Open occurrence,” and add a charm or a category to that particular appointment.
To remove a charm, right-click the appointment, hover on “Charm,” then click on “None.” To remove the category of an appointment, right-click the appointment, hover on “Category,” and click the category in order to uncheck it.

Responding to Appointment Invitations:

You can invite attendees to appointments you have created or be invited to appointments created by others.

1. To invite a person, add the person’s email address into the box below. You can invite more than one person at the same time by separating their names with a comma.

2. To accept an appointment, click “Accept.” You can edit your reply to the organizer by clicking the arrow beside “Accept” and click “Edit Reply.”
   a. You can also click “Tentative” or “Decline” and edit your reply to the organizer. To propose a more favorable time, you can click “Propose New Time.”
   b. Note that once you perform an action on an appointment, the invitation email automatically goes into your “Trash” folder. Accepted appointments will also appear on your calendar.
Sharing Your Calendar:

It is important that your calendar is shared with your colleagues and supervisors so that its features can be used to the fullest extent.

1. To share a calendar, first right-click the calendar you wish to share from the “Calendars” list on the left of the main calendar screen. A menu will pop up. Click the first option: “Share Calendar.”

2. Enter the email of the person with whom you want to share your calendar in the “Share with:” field. Multiple email addresses can be entered simultaneously when sharing the calendar.
   a. Once you start typing an email address, the autofill options will give you a list of names that might correspond to the person you are looking for. If you find him or her, just click on it to add that person’s email address to the list. Once you have entered all the email addresses, click “Send.”
   b. You can allow a user various permissions over your calendar, but leave it on its default selected value of “Full details.”

3. A message will be sent to the user to accept your share invitation.

Accepting a Calendar Share:

1. When you receive an email for a calendar share from someone, click the “Accept” button.

   a. The calendar you have just accepted will show up in the list of calendars when you click on the “Calendar” tab at the top.

2. To view or hide a particular calendar, check or uncheck the calendar’s name by clicking it.
Revoking Shares:

Upon termination of your employment, please revoke your calendar share with all your former colleagues and supervisors.

1. To revoke a share (thus removing someone’s ability to access your calendar), right-click the relevant calendar in the “Calendars” list on the left.

2. Click “Permissions.”

3. A new window will pop up showing you all the people with whom you have shared your calendar. Click “X” in order to revoke a share with that particular person. Once you are done, click “Save” to apply the changes.

Miscellaneous:

1. Remember that appointments that are made private cannot be seen by those with whom you have shared your calendar. They will see a block of time but not the description. You can tell that an appointment has been properly made private if you see a little lock image on your appointment. Keep in mind that if an appointment is public, that means its description will be visible to those with whom you have shared your calendar; it is not visible to the general public.

2. If you want to change the way W-Exchange handles your appointments by default and the way your calendar looks in general, first click “Settings” on the upper-right corner from any W-Exchange application, then click “Calendar.”
3. Click “Calendar appearance” from the option toolbar as shown above. A new window like the one below will pop up. This will allow you to change all of your options and personalize your calendar. You can set the days that will be visible on your work week schedule, the first day of your work week, your working times, the color of appearance of your calendar, etc. After you are done making all the changes, click “Save.”
4. If you have multiple calendars (this will happen if others share their calendars with you) you can select which ones are visible simultaneously from the “Calendars” list on the left-hand side of the screen. Check all of the calendars you wish to see, and uncheck any that you wish to hide by just clicking them. It can be handy when you are trying to compare the office or mentee’s calendar with yours to check for availability.

5. You can change the color and name of these calendars by right-clicking the calendar and selecting “Rename” or “Color.” If you wish, you can attribute a color to each calendar that you have access to.