Student Financial Services
Staff Resource Guide

Washington State University
World Class. Face to Face.
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2 Effective: 5/2023
1 INTRODUCTION
Student Financial Services has developed this document 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 the 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 any accrued Personal Holiday, Sick Leave, or Compensatory Time.

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

For more information, please visit the WSU Business Policy and Procedures Manual at https://policies.wsu.edu/prf/index/manuals/business-policies-and-procedures-manual/

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 work from home or an alternative worksite up to the length and terms of the agreement. WSU 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.

2.4 Incidental Occurrences Within Remote Work Situations

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 worksite. Emergency cases will be reviewed and approved on a case-by-case basis, with final approval coming from your associate director. Employee will submit request to direct supervisor, supervisor forwards to associate director to confer with AVP on final decision. The goal is to be consistent and fair with all such incidental requests.

In the occurrence that an employee is working within an approved telework arrangement, and is experiencing issues, technical or otherwise, for intermittent or sustained periods, that adversely affects their ability to complete work assignments, the following options are available to these employees.

- The employee can request to adjust their schedule for the time their internet was out and make up the time.
- They can use appropriate leave or leave without pay (LWOP) to cover the time(s) they are unable to work.
- Alternatively, if they are able to come into the office, management can offer this as a solution while technical and connectivity issues are addressed and repaired.
Technical issues can be defined as internet connectivity outages and equipment failure. Please see your immediate supervisor for further instruction if needed and/or refer to section 4.5.

3 EMPLOYMENT POLICIES

3.1 Equal Employment Opportunity

**WSU Policy**

**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 the above WSU policy as well as 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**
All updates and changes to personal and office specific contact information is done through the profile function in Workday. Please visit [https://jira.esg.wsu.edu/servicedesk/customer/kb/view/156964405](https://jira.esg.wsu.edu/servicedesk/customer/kb/view/156964405) for instructions on any changes/updates 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). SFS must 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.
3.5 Inclement Weather and Emergency Closures

**WSU Policy**

At times, emergencies such as severe weather, fires, or power failures can disrupt company operations. In such instances, University administrators will decide to close or adjust the regular operating schedules. WSU will provide official notification to all employees. These notifications of emergencies to WSU Pullman personnel and students will occur 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: https://oem.wsu.edu/emergency-procedures/severe-weather/
- 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: https://alert.wsu.edu/how-do-i-sign-up-for-emergency-notifications/
- WSUALERT provides emergency messages on the WSU Alert telephone hotline at 509-335-2345.
- WSU Announcements provides notice to all subscribers of WSU Announcements.
- MyWSU 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: https://oem.wsu.edu/

If a staff member is unable to make it in or must leave the office due to adverse weather conditions, the following types of leave may be used:

- Accrued Annual Leave
- Accrued compensatory time
- Personal Holiday
- Sick Leave (after all leaves are exhausted, up to 3 days maximum in a calendar year)
- Leave without pay

**Student Financial Services Guidelines & Expectations**

Beyond HRS protocols, SFS leadership has discussed situations where operations have not been suspended but there is concern for unsafe traveling conditions that warrant some flexibilities.
• If there is inclement weather that has occurred overnight and there has been no official university announcement on suspended operations, please go to the SFS Operations calendar to see if any schedule adjustments are being allowed for in office Pullman SFS operations.
• If there are any temporary adjustments, these will be posted by 6:00am in the morning on the SFS Operations calendar for that day.
• Please pay attention to the weather forecast and if inclement weather is expected, remember to take your laptop home (for those who have one laptop with docking station) in case there is a need to work remotely.

For further information this topic, refer to https://hrs.wsu.edu/resources/inclement-weather/

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 workday 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 due to extenuating circumstances.

4.2 Absence

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 & Expectations

• Employees are expected to arrive at work on time for their scheduled shift and work until the end of their scheduled shift unless otherwise approved by the supervisor.
• An employee may request to temporarily change their work schedule for the current work week to account for time away from work instead of using paid leave or leave without pay if the time is infrequent and minimal (no more than an hour). Such requests are subject to review and approval by the supervisor. Exceptions to this policy may apply for staff supporting outreach schedules, refer to section 4.2 “Managing staffing schedules with various outreach events.”
• Employees are expected to attend department meetings and trainings as required, to arrive on time and, if applicable, be prepared for the topic.
• Overtime is not allowed under any circumstance unless prior approval is obtained, in writing, from the supervisor.
• Overtime eligible employees are to observe their breaks and meal periods in accordance with departmental, WSU and state policies, rules and regulations. The meal period and rest breaks cannot be
combined. Flexible schedules/shifts may be approved as necessary by the Supervisor to facilitate operational needs.

- Student Financial Services is a customer service unit that supports the University’s faculty, staff and students. Due to the nature of our work, SFS has peak operational periods throughout the year, most commonly at the start of fall and spring semesters. As such, employees are encouraged to plan anticipated time off accordingly. Refer to section 6.2 regarding the policy on annual leave requests and moratorium periods for flex time and annual leave.

- Annual leave must be requested in advance. Approval to use annual leave to cover absences from work is not “automatic” and is subject to review and approval. While emergencies do arise, employees are required to adhere to these department expectations.

- 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. In any unexpected absence situation, it is the responsibility of all employees to:

  1. Notify their immediate supervisor by phone, text, or email at least 30 minutes in advance of a scheduled work shift when possible and reasonable;
  2. Notify the Administrative staff, text, or email;
  3. It is the supervisor’s responsibility to confirm receipt of notice.
  4. If confirmation is not received within the hour, the employee is expected to contact another team member to make sure the office is notified.

- Respect co-workers and present a professional manner at all times. No profanity is allowed in the department.

If you have concerns or questions about these expectations, report them directly to your supervisor.

4.3 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.

4.4 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 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.
Inclusive Language

WSU is committed to creating an inclusive, equitable community that welcomes and respects the diversity of our students, faculty, staff, and alumni.

Inclusive language is a key part of building that community by conveying respect for and sensitivity to the differences among people. All written content should be free from words, phrases, or tones that are offensive and/or exclude people based on their identities.

Please visit https://ucomm.wsu.edu/editorial-style-guide/inclusive-language/ to view the WSU guide on inclusive language.

Performance Improvement Plans & Corrective Action

As noted SFS is committed to the successful performance of all staff members. As a result, we ensure clear expectations. From time to time, the department expectations and employee performance do not align and there may be a need for corrective action.

Reasons for Corrective/ Disciplinary Action include, but are not limited to, habitual tardiness or working outside of designated hours, not meeting deadlines, lack of communication with supervisor, insubordination, sexual harassment, possession or drugs and/or alcohol, misuse of University property, identification or documentation, or intentional disruption of the educational processes or university functions.

4.5 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. Flextime assists in 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 staff and it is necessary to default back to a standard work schedule. Staff will be informed well in advance of non-flex weeks and moratoriums on scheduled annual leave.

The Flex Hours Selection is managed by the Administrative Team.
- 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 lunchtime during the workday must be factored in with a maximum of 1.5 hours for lunch. Due to in office coverage needs until 5:00, a standard practice of taking lunch at the end of the day is not allowed.
- The initial Flex time request is given to the immediate supervisor,
- Upon the supervisor's approval, the form is forwarded to the SFS Management Team for final approval and to ensure operational needs are fully staffed.

Managing staffing scheduled with various outreach events: Supervisors will work with employees assisting with outreach events/workshops to ensure that schedules are adjusted 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.

Employees wishing to take academic classes during their scheduled work hours must obtain approval by the department. If approved, the supervisor and employee will document how these hours are made up each week. Refer to WSU BPPM: 60.72.1

4.6 Office Space/Work Station Area

Student Financial Services Guidelines
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 members are responsible for emptying their 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. The kitchen is where food preparation (i.e., heating/ cooking) is to be completed. There will be no personal microwaves, rice cookers, etc. in personal workspaces. Coffee makers are allowed to make coffee or heating water. Additionally, small personal refrigerators are allowed to be used in personal workspaces, provided they are in good working order, and kept clean.

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 is a “free for all” for staff to enjoy

4.7 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 waive the meal period on a regular basis voluntarily. 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 workday 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 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 various 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 does not allow employees to waive their meal period due to the needs of the operation from a customer service aspect along with allowing flex hours.

### 4.8 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. WSU SFS is committed to a dress code policy that doesn’t impose heavier requirements on an employee because of their gender, race, religion, or cultural background. Employees are expected to dress in appropriate attire unless the day’s tasks and responsibilities require otherwise. Employees must present themselves in a clean and professional manner at all times. It is the supervisor’s discretion to identify and address concerns not listed on an as-needed basis. Employees are trusted to use good judgment in choosing appropriate attire for work at all times.

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

- Clothing should be without offensive language or inappropriate designs. Clothing with inappropriate logos or text are prohibited attire.
- Clothing should be free of holes, tears, or rips.
- Shorts are permitted if they are the appropriate length (walking shorts, Bermuda’s or just above the knee). This guideline is also applicable to skirts.
- Sandals/dressy flip flops are permitted, but no bare feet.
- No athletic clothing, i.e. yoga pants or sweats.

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.

### 4.9 Fragrance Policy

**Student Financial Services Guidelines**

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 debilitating conditions 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

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

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](http://public.wsu.edu/~forms/manuals.html).

**Student Financial Services Guidelines**

Student Financial Services follows the above university policy and all Staff are required to complete the EMT Security Modules.
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.

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<th>Prohibited Uses</th>
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<tr>
<td>Employees are prohibited from using</td>
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<td>(ANY) state resources for:</td>
</tr>
<tr>
<td>1. Personal financial gain</td>
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<td>2. Promotion of outside organizations</td>
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<td>3. Promotion of campaigns</td>
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<tr>
<td>4. Lobbying efforts</td>
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<tr>
<td>5. Any use prohibited by law or</td>
</tr>
<tr>
<td>WSU policy</td>
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<tr>
<td>6. Any private use of state property</td>
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<tr>
<td>away from its official duty location</td>
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*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 https://hrs.wsu.edu/resources/policies-resources/. This form contains details of where 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 Associate or Assistant Director of Communication if they encounter any social media related communication or “conversation” they feel needs an official response from SFS as an 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.

4.16 Virtual Meeting Policies and Best Practices

Student Financial Services Guidelines
It is the goal of our organization to ensure that we have a virtual meeting environment that is conducive to collaboration and success.

Preparation:

- Locate yourself in a work appropriate space.
- Have your video and audio device connected to your device and tested before you begin. If you are connecting to an audio-only meeting, you only need a microphone.
- Please ensure that all other chat and video applications are not running. If on a mobile device, close any other apps.
- When connecting your machine to the internet, wired is preferred over wireless. If using wireless, a reliable internet connection is recommended. For mobile calls, it is recommended to be on wireless, so you don’t use your mobile bandwidth.

In call etiquette:

- Once you are observed, mute your microphone unless you are speaking. Please remember to mute in the application and not at the headset. Some headsets have a mute on the cord, but these do not fully mute audio on some headsets, so please do not use it.
- Zoom background and filters should be work appropriate.
- All applicable in person protocols apply to Zoom meetings.
- Be aware that you are always on camera; anything you would not do in public would apply here.
- Unless you are presenting, please do not open additional applications such as email, Word, or PowerPoint. Surfing the internet while participating in a call will degrade your experience, as well as the experience of others.

https://confluence.esg.wsu.edu/display/KB/Zoom++Joining+Meetings+and+Best+Practices

Improving your Virtual Experience

https://its.wsu.edu/documents/2020/03/zoom-tips.pdf/
WSU Information Technology Services

WSU Information Technology Services (ITS) offers the digital tools for individual and group virtual meeting protocols and instructions.

The following link provides information on successfully navigating ZOOM, TEAMS and the WSU Mobile app as well as resources provided by the Crimson Service Desk to assist in a virtual meeting environment.

https://its.wsu.edu/cougs-online-toolkit/

WSU Self Help Knowledge Base - Self Help Resources

https://confluence.esg.wsu.edu/display/KB/Self+Help+-+Zoom

5. COMPENSATION POLICIES

5.1 Timekeeping Procedures

WSU Policy

Workday is WSU's system for reporting time for all hourly employees, time for salaried overtime eligible employees and absences and time-off requests. Workday will enable all of the following:

- Managers to approve time entry and time off.
- Employees to view time-off balances or accruals at any time.
- Mobile time entry and approval.
- Automatic time off accruals.
- Tracking of types of pay, such as overtime.

Student Financial Services Guidelines

Student Financial Services follows the above university policy. Staff will enter and correct time in the Workday system. All employees who are eligible for overtime should be entering their time worked in Workday. Time should be submitted and approved, at minimum, each pay period (pay periods end on the 15th and 30th/31st of the month). Employees should consult with their respective supervisor regarding expectations for time submission deadlines.

By submitting time for approval, the employee is certifying the hours submitted have been worked and are accurate. The Time Approver/Manager is responsible for validating and approving that all hours have been worked, all time off has been accounted for, and all pay impacting activity is appropriate.

Exempt (Not Overtime Eligible) Employees will only enter absences into Workday.

For more guidance please visit the Workday service desk
https://jira.esg.wsu.edu/servicedesk/customer/kb/view/156963721

5.2 Overtime

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 https://policies.wsu.edu/prf/index/manuals/business-policies-and-procedures-manual/bppm-60-59/#:~:text=Overtime%20Summary&text=The%20official%20WSU%20workweek%20begins,one%2Dhalf%20the%20hourly%20rate for more information on overtime/comp time pay.

**Student Financial Services Guidelines**

Student Financial Services follows the above university policy. Prior to working any hours beyond their standard workweek, an employee must receive approval from their supervisor. An Overtime-Eligible employee is to follow the procedures outlined by his or her Department Administrators. To initiate the approval through Workday, the employee can request overtime based on the instructions in the Request Overtime Reference Guide.

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](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: [http://www.hrs.wsu.edu/APHandbook](http://www.hrs.wsu.edu/APHandbook) 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 – May) request due mid-December
• Summer (June – August) request due mid-March

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

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 into 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 members are expected to check the SFS Staffing calendar daily.

### 7. EXPENSES

#### 7.1 Office Supplies, Other Expenditures

**WSU Policy**


**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 [https://policies.wsu.edu/prf/index/manuals/business-policies-and-procedures-manual/bppm-95-20/](https://policies.wsu.edu/prf/index/manuals/business-policies-and-procedures-manual/bppm-95-20/)

**NOTE:** The website URL for Workday reference guides that are referenced in this section is: [https://confluence.esg.wsu.edu/display/WKB/Workday](https://confluence.esg.wsu.edu/display/WKB/Workday)

**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 regular staff meetings based on the needs of the operation. Staff meetings are sent to all office employees via meeting requests on outlook calendars with zoom.

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

8.2 Email

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 yournetworkID@wsu.edu.

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

Minimal 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 intended for reference by creating folders on the hard drive, which are identified in Outlook as “Personal Folders.”

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:

INSTRUCTIONS:
1. Copy the table below (logo, line and information block of text).
2. In Microsoft Outlook, paste it into your ‘Signatures’ panel or your email message.
3. Update the information with your personalized information (name, title, dept, phone, etc.)
4. Save your signature in Outlook.

Name
ASSISTANT DIRECTOR - COMMUNICATIONS
Student Financial Services/ SSIC
Enrollment Management
Washington State University
Office: (509) 335-9785
Call Center: (509) 335-9711
Mobile: (509) 339-3279
Email: xxxx@wsu.edu
financialaid.wsu.edu
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 SFS411

Student Financial Services Guidelines
SFS411 is the system of record for SFS job-related updates. Please refer to the site regularly for the most up to date job-related information.

8.4 Staffing Calendar

WSU Policy
Departmental discretion for staffing calendars.

Student Financial Services Guidelines
The SFS Sharepoint Calendar is the official site for tracking of staff not at work for any reason: sick leave, annual leave, late arrival. The supervisor (Office Manager as back up) is responsible for updating the calendar for unexpected leave. This will be used in place of sending a listserve email to all staff. Student Financial Services employees should check the Staffing Calendar on a daily basis.

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

8.5 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.

8.6 Daily Task Tracker Tool

WSU Policy
Departmental discretion for calendars.

Student Financial Services Guidelines
The Daily Task Tracker is a tool developed to help staff track what they have accomplished and for management to evaluate the allocation of resources and time. This tool may be used to track employees approved overtime hours or with intermittent remote work. 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 managed through Smartsheets.

8.7 Internal/External Committees

Student Financial Services Guidelines

Internal
Several SFS internal working teams represent a cross-section of the operation. The management and administrative team work together to 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

8.8 Communications Closing Statement
Successful working conditions and relationships depend on successful communication. Employees must stay aware of changes in procedures, policies, and general information. It is also essential to communicate ideas, suggestions, personal goals, or problems as they affect your work and the office in general.

8.9 Customer Service

Staff Responsibility:

Just like any other job duty, customer service assignments are an expected part of nearly all of our jobs. Permanent staff who are assigned customer service hours and who have conflicts (meetings, time-off, scheduling changes, etc.) are expected to find someone to replace them for the assigned shifts. If this is an issue, they are to work with their supervisor. All of the various customer service roles outlined are intended to be a scheduled block on the staff person’s schedule. Even if they are serving as the on-call, or the on-call back-up, they just keep that hour free and should be ready to step in as outlined in the document.

Listing of roles and their details can change, depending on the time of year and other factors. For the most up-to-date information on customer service roles, please refer to the SFS411 at: https://financialaid.wsu.edu/sfs411/customer-service-support/

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
SFS Safety Procedures can be found at sfs.411.wsu.edu>Internal Administration>Safety Tab

Effective: 5/2023
**Student Financial Services Guidelines**

Key cards (WSU Smart ID) should be carried and used at all times. The office doors should never be propped open and left unattended.

You are responsible for your key card. Any lost/stolen cards need to be reported to the Principal Assistant or Fiscal Analyst immediately, and you will be responsible for purchasing a replacement card through the Cougar Card Center.

Please work with your supervisor to ensure that your key card will allow you to enter the office during your regular work hours, including evenings and weekends, if needed.

**Visitors to SFS**

1. Employees are asked to notify the front desk staff of when they are expecting a visitor so that the front desk staff knows whom to call to alert them when they have arrived. Staff members should meet their visitors in the lobby and use their key card to escort them to the back office.

2. If visitors are from another WSU department utilizing the Lighty 380 conference room, the front desk staff will verify the meeting scheduled and use their key card to escort them to the conference room.

3. If you are entering one of the vital card doors and another employee is entering with you, you are both not required to swipe your card. If you are unsure of who is coming in behind you, please ask to see their crucial card or ask why they are entering the office.

**Access SFS Outside of Work Hours**

1. Supervisors will communicate with the Principal Assistant the hours employees need to have access to the office and the building.

2. The Principal Assistant will enter these hours in the Keyless card system and communicate with employees and supervisors via email. Backup support for these request is the Fiscal Analyst.

3. If an employee needs to access the building or office during a time, they do not typically have the access they should make arrangements with their supervisor.

Reminder to keep both the northeast and the west employee entrance doors closed and locked at all times. Do not “prop” them open. Use your Key card. Keep the southwest door, going immediately from the reception area into the employee workspaces closed and locked.

**Emergency Door Procedures for SFS**

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 workspaces. Employees stationed at Windows 1-4 should exit either through the lobby, going through the door behind the “front desk” area or the east door to employee workspaces. 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.
10. Financial Aid Statement of Ethical Principles and Code of Conduct

Washington State University, Office of Student Financial Services, follows the recommended Statement of Ethical Principles & Code of Conduct provided by the National Association of Student Financial Aid Administrators (NASFAA).

10.1 Statement of Ethical Principles

STATEMENT OF ETHICAL PRINCIPLES

WSU SFS Financial aid administrators shall:

Advocate for students

- Remain aware of issues affecting students and continually advocate for their interests at the institutional, state, and federal levels.
- Support federal, state and institutional efforts to encourage students, as early as the elementary grades, to aspire to and plan for education beyond high school.

Manifest the highest level of integrity

- Commit to the highest level of ethical behavior and refrain from conflict of interest or the perception thereof.
- Deal with others honestly and fairly, abiding by our commitments and always acting in a manner that merits the trust and confidence others have placed in us.
- Protect the privacy of individual student financial records.
- Promote the free expression of ideas and opinions, and foster respect for diverse viewpoints within the profession.

Support student access and success

- Commit to removing financial barriers for those who want to pursue postsecondary learning and support each student admitted to our institution.
- Without charge, assist students in applying for financial aid funds.
- Provide services and apply principles that do not discriminate on the basis of race, gender, ethnicity, sexual orientation, religion, disability, age, or economic status.
- Understand the need for financial education and commit to educate students and families on how to manage expenses and debt responsibly.

Comply with federal and state laws

- Adhere to all applicable laws and regulations governing federal, state, and institutional financial aid programs.
- Actively participate in ongoing professional development and continuing education programs to ensure ample understanding of statutes, regulations, and best practices governing the financial aid programs.
- Encourage colleagues to participate in the financial aid professional associations available to them at the state, regional, or national level and offer assistance to other aid professionals as needed.

Strive for transparency and clarity

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Effective: 5/2023
• Provide our students and parents with the information they need to make informed decisions about attending and paying for college.
• Educate students and families through quality information that is consumer-tested when possible. This includes (but is not limited to) transparency and full disclosure on award notices.
• Ensure equity by applying all need analysis formulas consistently across the institution's full population of student financial aid applicants.
• Inform institutions, students, and parents of any changes in financial aid programs that could affect their student aid eligibility.
• Strive to ensure that the cost of attendance components are developed using resources that represent realistic expenses.

Protect the privacy of financial aid applicants

• Ensure that student and parent private information provided to the financial aid office by financial aid applicants is protected in accordance with all state and federal statutes and regulations, including FERPA and the Higher Education Act, Section 483(a)(3)(E) (20 U.S.C. 1090).
• Protect the information on the FAFSA from inappropriate use by ensuring that this information is only used for the application, award, and administration of aid awarded under Title IV of the Higher Education Act, state aid, or aid awarded by eligible institutions.

10.2 Code of Conduct

CODE OF CONDUCT

1. No action will be taken by financial aid staff that is for their personal benefit or could be perceived to be a conflict of interest.
   a. Employees within the financial aid office will not award aid to themselves or their immediate family members. Staff will reserve this task to an institutionally designated person, to avoid the appearance of a conflict of interest.
   b. If a preferred lender list is provided, it will be compiled without prejudice and for the sole benefit of the students attending the institution. The information included about lenders and loan terms will be transparent, complete, and accurate. The complete process through which preferred lenders are selected will be fully and publicly disclosed. Borrowers will not be auto-assigned to any particular lender.
   c. A borrower’s choice of a lender will not be denied, impeded, or unnecessarily delayed by the institution, even if that lender is not included on the institution’s preferred lender list.
   d. No amount of cash, gift, or benefit in excess of a de minimis amount shall be accepted by a financial aid staff member from any financial aid applicant (or his/her family), or from any entity doing business with or seeking to do business with the institution (including service on advisory committees or boards beyond reimbursement for reasonable expenses directly associated with such service).

2. Information provided by the financial aid office is accurate, unbiased, and does not reflect preference arising from actual or potential personal gain.

3. Institutional award notifications and/or other institutionally provided materials shall include the following:
   a. No amount of cash, gift, or benefit in excess of a de minimis amount shall be accepted by a financial aid staff member from any financial aid applicant (or his/her family), or from any entity doing business with or seeking to do business with the institution (including service on advisory committees or boards beyond reimbursement for reasonable expenses directly associated with such service).
   b. Clear identification and proper grouping of each type of aid offered indicating whether the aid is a grant/scholarship, loan, or work program.
c. Estimated net price
d. Standard terminology and definitions, using NASFAA's glossary of award letter terms.
e. Renewal requirements for each aid type being offered as well as next steps and financial aid office contact information

4. All required consumer information is displayed in a prominent location on the institutional web site(s) and in any printed materials, easily identified and found, and labeled as "Consumer Information.

5. Financial aid professionals will disclose to their institution any involvement, interest in, or potential conflict of interest with any entity with which the institution has a business relationship.

10.3 Data and Cyber Security

Enrollment Management is committed to promoting and supporting a secure and safe computing environment. Enrollment IT has created this site to provide a dedicated and holistic view of WSU security resources for Enrollment Management staff and business partners.

For training, policies, information and who to contact concerning guidelines for safe computing and working with university data including:

- Enrollment IT and Incident Response Contacts
- WSU Policies
- Questions about Cyber Security
- Federal and State Privacy Laws
- Safety
- Ethics and Appropriate Use
- PCI Compliance
- Online Resources for Cyber Security

Please visit WSU Enrollment Management security at https://em.wsu.edu/security/

Our Mission ...

To keep student success central while providing the highest level of service, and equal opportunity in the awarding of funds at all WSU campuses. We increase opportunities for access and affordability by providing accurate financial information, and individualized guidance and support for students and families in an environment which embraces teamwork and collaborative partnership.
Our Vision ...

Student Financial Services will be a leader in the nation by providing a faster, friendlier, and easier financial aid experience. We seek to create a culture of care and to deliver resources that allow all students the opportunity for education through an ongoing commitment to our values: innovation, transparency, dignity, and diversity.

To sign acknowledgment and receipt of the Student Financial Services Staff Resource Guide please use the link below:

https://app.smartsheet.com/b/form/26f6553cf8264bc98a5364166a5075f1