

5 Chapter

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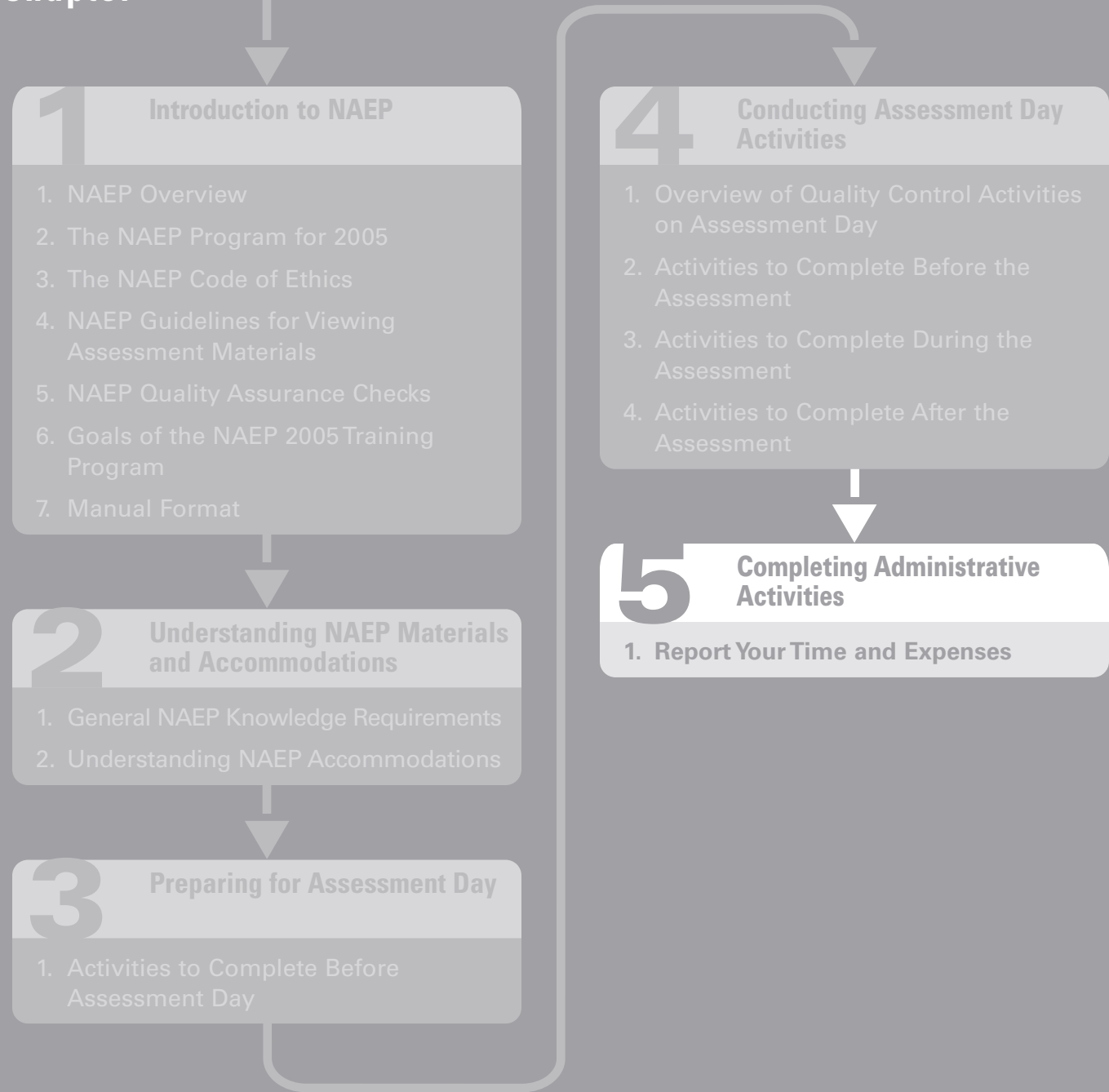
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1. Report Your Time and Expenses



5 Completing Administrative Activities

This chapter describes the administrative activities you need to complete after you leave the school. It provides specific guidelines for reporting your time and expenses to Westat.

Procedure 1. Report Your Time and Expenses

The Field Time and Expense Report (T&E), shown on the next page, is to be used to record hours worked each day, the number of miles driven between schools and your home, and any other expenses that relate directly to your assessment duties. It is your responsibility to complete this form daily and submit an accurate T&E to your AC in a timely manner. **T&Es that have errors or are incomplete could result in a delay in pay/reimbursement.**

AAs may report up to 8 hours a day for actual time worked. This time may be used to assist your AC in activities such as preparing for upcoming assessments and entering data into the AC's computer.

Your AC will provide you with a supply of T&Es. Your AC is responsible for reviewing your completed T&Es and submitting the T&E to your supervisor once a week for approval.

Additional hours (more than 40 hours per week) will be allowed for AAs only under special circumstances and must be approved by your AC and supervisor. Approval must be granted prior to the work being performed.

AAs are reimbursed for all **authorized** expenses incurred during the assessment period. Examples of allowable and nonallowable expenses are listed on pages 5.8–5.9. A receipt must accompany all expenses listed on the T&E that are greater than \$1. Two exceptions would be mileage and parking meters where no receipts are available. In general, remember: no receipt means no reimbursement.

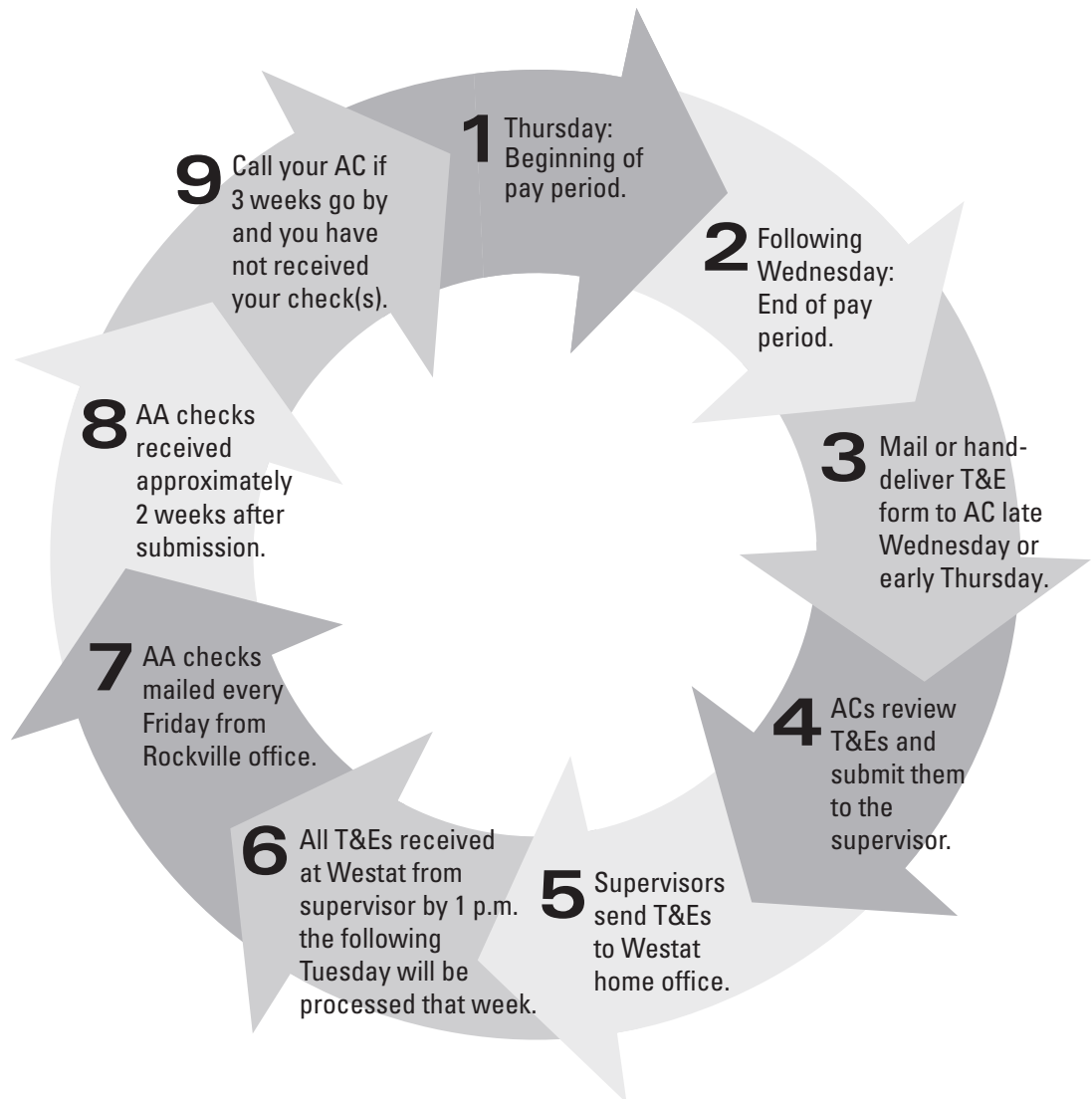
The Field T&E is a five-part, no-carbon-paper, pressure-sensitive form. Each part or copy of the set has a specific purpose and is a different color:

- payroll copy (white);
- accounts payable (A/P) copy (green);
- field director copy (canary);
- supervisor copy (pink); and
- employee copy (gold).

You will submit your T&Es weekly. A pay period runs from Thursday to the following Wednesday. Each T&E must show the Thursday starting date and must include only time worked from that Thursday to the following Wednesday. After finishing your work on Wednesday, all columns should be tabulated, and the summary section on hours, mileage, and expenses completed. Sign your T&E, pull-off the last copy (gold) to keep for your records, and mail or hand-deliver the first four copies to your AC. Timely submission of an accurate T&E to your supervisor for approval is crucial to the timely receipt of your paycheck and/or expense reimbursement.

Voices of Experience: What if I do not receive payment?

If you have not received a payment or been notified of an error on your T&E within 3 weeks from the date you submitted your T&E, contact your AC. Checks or deposit notifications for hours worked and expense reimbursements are mailed every Friday from Westat’s main office in Rockville, Maryland. The graphic below illustrates this process.



Identifying Information – Top Section

You need to be sure to clearly print the following information in the top section of your T&E:

WINS # (Westat Identification Numbering System): Using WINS numbers has replaced the convention of using Social Security Numbers on Westat T&Es. All T&E transactions are identified by your WINS number. Each Westat field employee is assigned a WINS number after all personnel paperwork is completed and handed in. If you have not yet received your WINS number from Westat, contact your AC immediately.

<p>WESTAT <small>An Employee-Owned Research Corporation</small> <small>1650 Research Blvd. • Rockville, MD 20850 • 301 251-1500</small></p>
<p>WINS #: W 1 2 3 - 4 5 6 7 </p>

Name: Print your legal name in the following order: Last Name, First Name, Middle Initial.

City/State: Record the city and state of your legal residence. This is for identification purposes only; it is not necessarily your mailing address. If you have a new legal or mailing address, make sure you notify your AC immediately to ensure that the proper paperwork is submitted to the home office. The address on the T&E will **NOT** update the address to which your check is mailed.

FIELD TIME AND EXPENSE REPORT			
Name:	<small>Please Print</small> <u>Brown</u>	<u>Mary</u>	<u>A.</u>
	<small>Last</small>	<small>First</small>	<small>M.</small>
City/State:	<u>Chicago</u>	/	<u>IL</u>
	<small>City</small>		<small>State</small>

Period Ending Date: Enter the date of the Wednesday that ends the T&E pay period.

<p>PERIOD ENDING DATE: Wednesday</p> <p>0 2 - 2 3 - 0 5 </p> <p>Month Day Year</p>

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1. Report Your Time and Expenses

Time – Middle-Left Section

Hours Worked: Time is to recorded daily for each nonweekend workday. You need to record the month and date for each day. You will record up to 8 hours of time actually worked per nonweekend day.

- **FW line (Field Work):** Include all time spent:
 - conducting assessments in schools;
 - at the school preparing for the assessment and reviewing, editing, and coding completed booklets and other assessment materials following the assessment;
 - meeting with your assessment team members;
 - assisting your AC with preassessment activities; and
 - doing other tasks requested by your AC.
- **T line (Travel):** Include the time spent traveling between your home and the location of the preassessment work or the assessments by personal car or mass transportation.

At the end of each day, total the number of hours for the day – not to exceed 8 unless authorized. At the end of the pay period, enter the total number of hours across all rows and columns and then total the hours worked across each charge code and enter this number at the bottom of the total column in **TOTAL HOURS (A)**. The sum of the hours entered in the total column should match the sum of the hours entered in the daily row (total across equals total down).

Miles Driven: Record the miles driven from your home to the preassessment activity or school and vice versa each day in the bottom box in the daily column. At the end of the week, add up the miles driven each day and enter the total miles in the right-hand box designated **MILES DRIVEN (B)**.

Production Report: DISREGARD THE PRODUCTION REPORT SECTION FOR THIS PROJECT.

Enter time to the nearest .25 hour (Total	Project Name
THU	FRI	SAT	SUN	MON	TUE	WED			
M/D	M/D	M/D	M/D	M/D	M/D	M/D	M/D		Charge Code:
/	/	/	/	/	/	/	/		Project Name
FW									Charge Code:
T									Project Name
FW									Charge Code:
T									Project Name
FW									Charge Code:
T									Project Name
FW									Charge Code:
T									Project Name
HOURS								(A)	← TOTAL HOURS:
MILES								(B)	← MILES DRIVEN:
Production Report									

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1. Report Your Time and Expenses

Expenses – Middle-Right Section

This section of the form is used for recording allowable out-of-pocket work expenses. For any expense greater than \$1, except mileage and parking meters, a receipt is required. Receipts should be in the same order as they appear on the T&E and should be securely stapled to the right-hand side edge of the top copy (white) only.

At the end of the pay period, expenses must be totaled by category and recorded on the same line as the corresponding time and charge number when the expenses occurred. Total the expenses for all categories at the end of the row. Expenses must also be totaled by category down the columns.

Respondent Incentives: DISREGARD THIS COLUMN FOR THIS PROJECT.

Copying: List any copying expenses.

Telephone: During the course of the project, you may be required to make some long distance calls to your AC or to schools. When reporting telephone expenses, enter the amount on the T&E and send along with a copy of your telephone bill. Your statement should have all calls highlighted for which you are requesting reimbursement. No long distance expenses will be reimbursed without a copy of the bill. If a pay telephone was used, indicate that on your T&E as pay telephone and no receipt is needed.

Supplies: List any preapproved supply expenses.

* NOT FOR OUT-OF-TOWN TRAVEL *								
SUMMARY OF EXPENSES BY PROJECT CODE								
SUPERVISOR'S	Respondent Incentives	Copying	Telephone	Supplies	Postage	Other Specify:	Mileage Allowance (FLDLOC)	Total Expenses Including Mileage:
	(DRESPI)	(DCOPY)	(DTELE)	(DSUPP)	(DPOST)	(FLDOTH)	@ _____ per Mile	
							_____ Miles	
							\$ _____	
							_____ Miles	
							\$ _____	
							_____ Miles	
							\$ _____	
Totals:							_____ Miles	
							\$ _____	
							(B)	

Total Expenses (per row) Including Mileage

Rate per Mile

Mileage Allowance (number of miles and dollar amount at above rate per mile)

Total Expenses (per column)

Postage: List any postage expense you may have incurred. Expenses for purchasing stamps to mail to your AC, supervisor, or the home office is an allowable expense. Be sure to obtain a post office receipt. Submit the expenses on the T&E with a receipt attached.

Other: List the name and amount of each miscellaneous expense that you are claiming. If you incurred more than one miscellaneous expense, record the expense type and amount in the next box down in the column. Then total the miscellaneous expenses and circle the total.

Allowable **other** expenses include the following:

- **Tolls.** Tolls or road fees on bridges, expressways, tunnels, etc., are acceptable and should be shown on the T&E with attached original receipts.
- **Parking.** In congested urban areas where free parking is not available, Westat will pay for parking. To obtain reimbursements for parking, enter charges on your T&E and attach the original receipt. If metered parking, indicate on your T&E as "Parking Meter" and no receipt is needed.
- **Travel by mass transportation.** Fares for bus, subway, and other forms of mass transportation used on official business are allowable expenses. Indicate the number of trips on a single day.

You will **NOT** be reimbursed for the following expenses:

- meals (except as allowed in special circumstances by advance agreement with your AC);
- fines — Westat assumes no responsibility for payment of fines, such as traffic tickets, towing, or other indebtedness of ACs or AAs caused by their own violation of laws or errors in judgment;
- car repairs, car upkeep, or car insurance;
- taxi fares (unless AC approved); or
- pager fees or cellular telephone fees (charges for calls on cellular telephones will be reimbursed if the call is highlighted on the bill and submitted as described above).

Mileage Allowance. Mileage is paid at the rate of 37.5 cents for each mile driven on NAEP-related business. Record miles to the nearest rounded mile. Enter the mileage allowance (37.5 cents) at the top of the column. Enter the total miles driven on the **Miles** line for each charge code. Multiply the total miles driven by 37.5 cents to arrive at the reimbursement amount line (\$____). Round up to the nearest whole cent. Total the number of miles and reimbursement amount at the bottom in the **Totals** row. Total miles in the **Expense Total** column (**B**) must match total miles in the **Miles Driven** column (**B**).

Total Expenses. In the final column, total all expenses by charge code. Then total all expenses for a category of expense at the bottom of the column.

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1. Report Your Time and Expenses

Type of Pay – Bottom-Left Section

Type of Pay Rate: Enter your pay rate on the **Special Rate** line. It is critical that you enter the correct rate on the line that corresponds to the Type of Rate box that was marked in the Project Information section.

Hours: Transfer the total number of hours from the time reporting section (left of page) to the hours line next to your pay rate. Total the hours on the **Hrs. Total** line (A). This total should match the **Total Hours (A)** in the time section of the report.

Amount: Multiply the hours by your hourly rate to compute the total amount earned.

Pay Total: Total your pay amount on this line.

Other: DISREGARD THIS SECTION OF THE T&E FOR THIS PROJECT.

Grand Total: DISREGARD THIS SECTION OF THE T&E FOR THIS PROJECT.

Page _ of _ : DISREGARD THIS SECTION OF THE T&E FOR THIS PROJECT.

KEY	TYPE OF PAY	RATE	HOURS	AMOUNT
	Base Rate	\$ _____ X	_____	= \$ _____
	Special Rate	\$ _____ X	_____	= \$ _____
	Supervisor Rate	\$ _____ X	_____	= \$ _____
			(A)	
			<u>HRS. TOTAL</u>	<u>PAY TOTAL</u>
	Other	\$ _____	_____	\$ _____
		\$ _____	_____	\$ _____
				GRAND TOTAL: _____

Special Rate line (enter pay rate here)

Hours Total (enter total amount of hours here)

Pay Total (enter total pay amount here)

Should Match (B) These Miles Should Match

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Payroll Authorization – Bottom-Right Section

Home Office Authorization: This area is for office use only. Do **NOT** make any entries.

Payroll Authorization: This must be completed and signed before the T&E can be approved and paid. You must not work more than 40 hours a week without authorization from your AC. Enter the date the reporting week began and check whether you **have** or **have not** worked more than 40 hours. If you have worked more than 40 hours that week, provide the name of the person who authorized the additional hours and the number of extra hours you worked. **In all cases you must sign this box.** Your T&E will not be processed unless this section is completed and signed in ink. Use only blue or black ink. Do **NOT** use pencil or red ink or felt-tipped pens. **T&Es that have errors or are incomplete could result in a delay in pay/reimbursement.**

Copies: Send only the first four copies to your supervisor. Keep the final gold copy for your records.

HOME OFFICE AUTHORIZATION	PAYROLL AUTHORIZATION
<input type="checkbox"/> Base <input type="checkbox"/> Special Overtime Hours _____ Signature _____ Date _____	<p>This report will not be processed unless this section is completed.</p> <p>I certify that the information on this form is accurate and that during the week described above I have <input type="checkbox"/>, have not <input type="checkbox"/>, charged Westat for more than 40 hours. If more than 40 hours, I was authorized by (NAME) _____ and worked _____ additional hours.</p> <p>* Or more than 8 hrs/day in AK, CA, or NV.</p> <p style="text-align: right;">_____ (EMPLOYEE'S SIGNATURE) (DATE)</p> <p>----- For Supervisor: I have reviewed and approved this T&E report. -----</p> <p>_____ (SUPERVISOR'S SIGNATURE) (DATE) _____ (SUPERVISOR'S SIGNATURE) (DATE)</p>
<p>COPIES: WHITE: PAYROLL GREEN: A/P CANARY: FIELD DIRECTOR PINK: SUPERVISOR GOLD: EMPLOYEE</p>	
<div style="border: 1px solid black; border-radius: 15px; padding: 5px; display: inline-block;"> Sign & Date Here </div>	

Chapter 5 Summary

Now that you have completed this chapter, you should be able to:

- ensure that T&Es are correct and submitted on time.