



OFFICE OF TRUST SERVICES PATHWAYS INTERNSHIP PROGRAM

6/29/2018

Student Work Assignment To Do List (Before, During and After)

This will help you prepare for and close out a work assignment. This is meant to provide you with an overview. You should receive Student Intern Coversheets throughout this process informing you of deadlines, reminding you of items needed, forms to complete, etc. If you have any concerns or questions regarding this checklist or would like to plan ahead, please contact us.

[Acronyms and Commonly Used Terms \(Pathways\)](#) Refer to the [New Employee System Accesses On-Boarding Checklist and Guide \(Student Only\)](#). It has links and pertinent contact information applicable to this process. Other Forms and Guidance can be located on our website at: <https://www.bia.gov/bia/ots/workforce-planning-coordination>

Section 1 - Before Summer Work Assignment Begins

- Complete FISSA+ and Cyber Security Trainings** in DOI Learn (NOTE: This is Annual. Every employee is required to do this each year or your accesses will be revoked).
- Email** the BIA Helpdesk to request your **Email and Active Directory** (Returning Students) accounts be Reactivated. After coming off of LWOP, security measures are in place deactivate employee's accesses after periods of no activity.
- Send copies** of your upcoming semester/quarter **School Schedule** and most recent **Transcripts** to your Coordinator and Central Office (D.C.).
 - If anything has changed, such as less than 2.0 GPA, less than full-time, anticipated graduation date. **LET US KNOW**. If you don't we won't be able to work with you after the fact.
- Work with Coordinator and Host Supervisor to complete the [Work Assignment Agreement \(WAA\) Form](#). This includes:
 - Negotiating Begin and End Dates
 - Identify who your Timekeeper and Certifier will be in Quicktime (QT)
 - Work with your Host Supervisor to complete a NEW [Work Schedule Agreement Form](#) (aka AWS).
 - Determine if travel to the worksite will apply (Not all Programs provide travel for rotational work assignments).
 - If travel does apply, contact your Coordinator to discuss the details and complete with them a [TDY – Travel - Trip Request Form](#).
 - Then send the Trip Request Form to your TDY Travel Preparer so that they can complete your Travel Authorization (TA) in Concur timely.
 - If you do not have a valid driver's license, you will not be allowed to drive a POV.
 - Also, remind your Coordinator to request that your **JP Morgan card be Reactivated**.
- If your Trip requires an overnight stay** (aka Stop Overs or Rest Periods):

- Confirm with your Host Supervisor the **Date, Time** and **Address** of when and where you should Report for Duty.

IMPORTANT: If you are going to be on TDY for this WAA, you will need time to get there. Your travel begin date must coincide with your WAA's Begin Date. Not before. For instance, if your WAA Begin Date is June 1st and you are approved POV and it will take you 2 days to drive there, your **Report for Duty Date** will be June 3rd. Work with your Host Supervisor and Travel Preparer to determine what date you will be expected to arrive.

- Ask your Host Supervisor and TK what their **T&A protocols** are:
 - **Email the Timekeeper** your contact information.
 - Do not take leave unless you have been approved in writing and in advance. Send copies of any leave slips to your TK.

TDY Travel (If applicable)

- Your TDY Travel Preparer will work with you to complete your TA in Concur. When it is approved/completed, they will **email you a copy** and provide instructions for you must do to submit voucher reimbursement requests, etc.
 - If you have been trained to complete your own TAs in Concur, make sure to send an email to travel_helpdesk@ios.doi.gov to request your account be reactivated and still work with your Travel Preparer because they will still need to review your TA before it can be approved.
- Send a copy** to your TA to 1) Host Supervisor and 2) Timekeeper, and 3) Coordinator!
- Carry a **paper copy of your TA** with you when you travel (you cannot travel without it!).
- Travel only on the Dates** listed on your TA (If there is a discrepancy between what is on your WAA and the TA, contact your Host Supervisor and Travel Preparer to confirm):
 - Follow the approved **Travel Route**
 - Record your start and end times and daily mileage (even if to airport) using the [TDY Travel - Voucher Reimbursement Worksheet Form](#)
 - Follow what is on your TA for Stop Over Points. It will list the City and State and Lodging Per diem Amount you are approved for.

HAVE FUN AND BE SAFE!



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- Stay within your Lodging Perdiem amount (If you exceed this, you may be responsible for paying the difference).

IMPORTANT: If there is an unexpected change in your route, first contact us immediately and second do not exceed the Lodging Perdiem amount for that location. If this is not possible, find a location that is closest to this amount. If this should occur, you will be required to submit a Waiver to the OTS Director (D.C.) to justify the overages and receive approval. Otherwise you will be required to pay for the cost out of your own pocket. The Perdiem amounts can be looked up the GSA website at: <https://www.gsa.gov/travel/plan-book/per-diem-rates>

- **KEEP YOUR RECEIPTS!** It's good practice to keep all receipts should you be audited. And in any case, Hotel, Car Rental, Flight Tickets is mandatory. Refer to the [TDY \(temporary duty\) Travel Overview Pathways Program Brochure](#).
- ONLY** use your JP Morgan Travel Card to pay for your **Hotel and Food (M&IE)**, unless you are told otherwise.
 - For M&IE, you may instead withdraw money from an ATM, but it CANNOT exceed the weekly allowance **Total amount for M&IE** (not including Lodging Perdiem).
 - Do not use it to purchase gasoline for your POV
- MAINTAIN CONTACT WITH HOST SUPERVISOR** during your trip.
- When you Report for Duty, complete the [TDY Travel - Voucher Reimbursement Worksheet Form](#), attach receipts and send to your TDY Preparer. You should expect to submit a reimbursement request to the Travel Preparer as follows:
 1. Enroute - Travel To (First Voucher)
 2. During - On Duty Status (Every 30 Days)
 3. Enroute - Travel to Return (Final)

Section 2 – Report for Duty Date and During Assignment

- Complete **Orientation with Host Supervisor**.
- Complete any **online training requirements in DOI Learn!**
- Submit your **Bi-Weekly T&As** and any leave slips to your Host Supervisor/TK by the deadline.
- Begin working with your Host Supervisor to complete your **IDP Development Activities** (training, assignments, projects, details):
 - Hand write in the date(s) completed
 - Get your Host Supervisor or Trainer's Initials to Confirm
- Take **Photos** of activities related to experiences and work assignments (because you will be requested to send them during the close-out period).

- If on TDY, follow the instruction provided to you by your TDY Preparer for submitting reimbursement requests.

IMPORTANT: If your Host Supervisor sends you on Travel, first find out who is paying for the Trip and get the accounting information. Then contact your Travel Preparer. Because your profile is setup in Concur under Central Office, the only official that can stamp (approve) your Travel is **Gayla Schock, Pathways Program Manager**.

Before she will do this, you will need to request for a copy of the TA from your TDY Preparer and get it signed by both your Host Supervisor and the Preparer. At the bottom of the TA is a section for signatures (shown below). The signed paper TA will be uploaded into Concur to document the approvals. **THIS IS YOUR RESPONSIBILITY** to make sure any travel is approved in time for you to travel.

Document Signatures

| | |
|------------------------------|-------|
| Traveler/Preparer Name: | _____ |
| Traveler/Preparer Signature: | _____ |
| Date: | _____ |
| Approver Name: | _____ |
| Approver Signature: | _____ |
| Date: | _____ |

- Reconcile your JP Morgan Statements** by the deadline (each month!) Refer to the [How to Reconcile Your Monthly Travel Charge Card Statements Pathways Program Guide](#). This is mandatory. Should and when you be selected to be audited by the A/OPC, if they find that this is not being followed (signed by the deadlines or not reconciled) your charge card account will be suspended (closed).

Section 3 - Before Assignment Ends (NTE Date) Closeout

- Submit a **copy** of your **IDP** to your Coordinator and Central Office. (Showing progress, tasks completed with signatures).
- Work with your Host Supervisor to complete and return to Central Office the [Student Intern Evaluation Form](#). This will be used to complete your year-end EPAP
- Schedule time with Central Office to complete your **EPAP** (Rating of Record).
- Send to Central Office **2 to 3 photos** (preferably with you in the photos!). Make sure to identify or label them: where and what you were doing.
- Confirm your **LAST DAY** at work and when you will begin travelling back to school/residence with your Host Supervisor and TDY Preparer.
- Work with your TK to complete your final **T&A in QT**. **Even travel time is paid.**
- Again, if TDY applies, when you arrive back at school, you will be given paid time to Complete:
 - **Enroute – Travel to Return** TDY reimbursement request
 - **Reconcile your JP Morgan Statement(s)**

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