

Administrative Procedures

Your attention to the details related to administrative procedures is as important to the success of the study as your adherence to the field protocols and procedures.

This section covers the procedures for completing and submitting timesheets, claiming field expenses, requesting and mailing data collection supplies.

8.1 Timesheet Procedures

All field employees use an electronic timesheet system to submit hours and local mileage. Refer to your *User Guide for the Electronic Timesheet and Field Expense Form* for detailed procedures. Enter your time/hours and mileage on the electronic timesheet on a daily basis. At the end of the work week, review your timesheet to make sure all information is accurate before signing and submitting it for approval. All timesheets and expense forms are monitored closely and discussed during your weekly report call with your supervisor.

Record your hours for the following data collection activities:

Do not work over 40 hours per week without advance authorization

- Case review and pre-visit preparation;
- Travel related to conducting interviews;
- Data collection;
- Training-related tasks; and
- Administrative activities, such as time spent on report calls, email, timesheets, updating information in the IMS, communicating using BSM, Field Expense Forms (FEF), Trip Expense Report (TER) forms, and submitting hardcopy materials.

As a guide, we would like you work an average of 6 hours each day. You must not work more than 40 hours a week without advance authorization from your supervisor. It is Westat policy that all overtime be approved in advance. If you anticipate that your assignment may require working more than 40 hours in a week (or more than 8 hours a day in the states of California and Nevada), discuss your schedule with your supervisor before working the extra hours.

Westat abides by all state overtime rules. Consult your supervisor if you have additional questions.

In addition to hours, record all your local miles on your electronic timesheet. Please make sure that your entries are made on the correct day and are supported by your Electronic Record of Calls. It is your responsibility to correct and make sure your timesheet is accurate before signing.

As part of the weekly report call, your supervisor will discuss your time and expenses. In addition to reviewing your current reports, your supervisor will also have reports available with cumulative hours, comparative hours and expenses, and costs per complete. These reports provide information for assessing your costs, relative to those of other field interviewers and to your own history.

Of course, the specific demands of a given assignment will be taken into consideration, when reviewing individual costs. Please be prepared to answer the following questions: Are you working the hours required to complete the assignment? Are you working these hours efficiently and effectively?

8.1.1 Reporting Non-Mileage Expenses

Enter all miscellaneous reimbursable expenses for telephone, postage, tolls, etc. separately on the hardcopy Field Expense Form (FEF). A receipt is required for any expense over \$1 and supplies must be pre-approved by your supervisor. Refer to the *User Guide for the Electronic Timesheet and Field Expense Form* for detailed information on the FEF.

The following types of expenses may be allowable on the NFS Field Test:

- Supplies;
- Postage;
- Parking; and
- Other transportation costs.

The following are **not** allowable expenses:

- Personal cell phone charges (unless prior approval is received);
- Meals when you are not on overnight travel status (unless prior approval is received);
- Fines (e.g., traffic tickets, towing);
- Car repairs, upkeep, or insurance;
- Taxi fares (unless prior approval is received); and
- Telephone service charges (including charges for texting and data usage) and taxes.

8.1.2 Trip Expense Report for Out-of-Town Expenses

All out-of-town trip expenses must be pre-approved and submitted on a separate form with receipts. Complete a Trip Expense Report (TER) form for all authorized overnight trips.

A trip begins when you leave home and ends when you return to your home. It may involve several destinations and multiple overnight stays in different cities. The times of arrival at and departure from your home must be reported accurately. In the upper right corner of the TER, record the date and time you left your residence and the date and time you returned. If you are on long-term travel, record these dates on every TER. Record the date that you expect to arrive home on TERs where the week ending date is before you arrive home. Enter the day of the week and the date for each day on travel. To expedite approval and processing of your form, write the city, county, and state of your travel destination below each day of your travel.

Complete one form for each trip lasting seven or fewer days. If the trip lasts more than seven days, use additional sheets. Label the pages as appropriate (e.g., page 1 of 2, page 2 of 2). TERs should be completed and submitted weekly. If a TER covers more than one week, each page should have a separate total. Do not provide a “grand total” across pages.

TERs include claims for these items, which are to be reported as follows:

- **Meals and Incidentals Per Diem:** The per diem rate is based on where you will spend the night. This amount includes all incidentals – telephone, laundry, tips, etc. You will receive 75% of the per diem rate for your first and last days of travel, regardless of what time you leave/arrive.

- **Employee Paid Lodging:** Report only the room charge on this line. Do not include taxes and fees. If lodging is billed directly to Westat, enter the words *Direct Billed* on the line; do not enter an amount in the Total column. Attach a receipt, even for direct billing.
- **Employee Paid Taxes on Lodging:** Report all taxes associated with the hotel room. If lodging is billed directly to Westat, enter the words *Direct Billed* on the line; do not enter an amount in the Total column.
- **Employee Paid Hotel Fees:** Report all fees associated with the hotel room. If lodging is billed directly to Westat, enter the words *Direct Billed* on the line; do not enter an amount in the Total column.
- **Employee Paid Airfare:** If Westat could not make travel arrangements for you, enter the amount on this line and attach any receipts.
- **Employee Paid Auto Rental:** If auto rental is not billed directly to Westat, enter the amount on this line and attach any receipts. If auto rental is billed directly to Westat, enter the words *Direct Billed* on the line; do not enter an amount in the Total column.
- **Mileage:** You will receive a mileage allowance for the use of a personal vehicle. Check with your FS for the current mileage allowance.
- **Ground Transportation:** You are reimbursed for use of public transportation if this is an acceptable mode of transportation for completing your work. Westat will reimburse taxi fare only for special situations approved by your FS. A receipt is needed. The tip can be included in the fare, but should be listed separately on the receipt.

TERs must contain supporting documentation for all expenditures such as tolls, parking, and travel to and from the airport. Attach the receipts to the back left side of the white copy of the TER. If a receipt is not available, a note of explanation must be provided with your expense report.

If you use your personal car on an overnight driving trip, report the mileage from your home to the hotel and from the hotel to your home on the TER. Miles driven while working within the PSU are reported as usual on your timesheet.

In addition to recording all the expenses for which reimbursement is claimed, include receipts for all charges paid by Westat, such as airfare, lodging, or car rentals. Car rentals should include the customer copy of the rental agreement; motel/hotel receipts should indicate the name and

address of the hotel. To check what was charged directly to Westat, refer to your Travel Itinerary or contact your supervisor.

When you have completed the TER, enter the total amount claimed (at the bottom right corner of the form) into the IMS.

Your supervisor reviews all expenses claimed for reasonableness, given the work assignment. TERs should be sent at the end of a trip or once a week for trips that last more than a week. Claimed trip expenses are subject to final approval by your supervisor and other field management staff. Travel expense reimbursement checks are distributed at the same time as your payroll check.

8.1.3 Absences Due to Illness or Emergencies

If you are ill or have a medical or family emergency that requires you to interrupt your data collection schedule, notify your supervisor immediately. He or she will determine the plan for your cases.

8.2 Getting Paid

Westat pays you via direct deposit. Paychecks are processed weekly on Fridays and are electronically deposited into your checking or savings account. For new employees, this automatic deposit does not become effective until the second paycheck. In order to ensure that a paycheck is deposited on Friday, the timesheet must be submitted no later than Monday. Your supervisor will review the form, call you if he or she has questions, and approve the timesheet before the Tuesday 1:00 p.m. ET deadline.

It is your responsibility to keep the required records for claiming time and expenses. These records are *not* estimates but represent your exact hours and expenses for each week. We recommend you use a calendar or electronic tools to carefully record hours and miles each day. Then, at the end of each day, enter the information in to the electronic timesheet system. When you login using your unique username and password and sign your electronic timesheet, you are certifying that entries are accurate and “in accordance with company policies and procedures.”

Charge your data collection time, mileage and expenses on NFS Field Test, to project charge code number **6565.01.10.03**. For hours and expenses related to training use the charge code number **6565.01.10.02**. Use the training charge code for your home study training (both pre- and post-classroom) and in person classroom training. Any training tasks related to the in person, out of town training, are covered under the training payment, as stated in your Field interviewer Assignment Details (DCAD). You should receive the DCAD during your hiring process.

If you work on multiple Westat projects, to avoid having to re-enter charge codes every week, we encourage you to identify your recurring charge codes as favorites for the period of time you are working on NFS Field Test. This process is covered in User Guide for the Electronic Timesheet and is very useful in expediting and ensuring accurate entries each week. After you have entered these codes on your electronic timesheet, check the box to the left of each code that you want to appear on future timesheets. Once you have checked those boxes, click on “add line to favorites”, which appears just above the Charge Description cell. Your supervisor can walk you through this process if you have any questions.

A typical NFS Field Test Timesheet will look like this:

Project	Charge description	Pay type
<input type="checkbox"/> 6565.01.10.03	6565.01.10.03- Data Collection	RFI
<input type="checkbox"/> 6565.01.10.03	6565.01.10.03- Data Collection	M
<input type="checkbox"/> 6565.01.10.02	6565.01.10.02- Training	RFI

The user guide also includes instructions for removing a project code from your favorites list once your project assignment is completed.

8.3 Accessing the Electronic Timesheet and IceWarp Email

You will need to access the Field Information Gateway (FIG) to access your Electronic Timesheet. In order to do so, you must be connected to the Internet.

8.4 Shipping and Receiving Materials

In Chapter 5 we discussed the equipment that you will handle on the NFS Field Test. At the start of data collection you will receive both equipment for yourself and for respondent's use. Make sure you keep all the packaging on equipment mailed to you as you will need them when you ship equipment back to Westat.

Your supervisor will provide you with specific instructions on the proper procedure for returning your computer and activities equipment at the completion of your assignment.

You will also use regular U.S. mail to send your supervisor your FEF and Trip Expense Report (TER) if applicable.

8.4.1 Sending Case Materials by FedEx

Your supervisor will direct you to use FedEx for materials and electronic equipment that need to be delivered quickly and securely. FedEx tracks the location of the package from pickup to delivery. You and your supervisor will be required to sign for all project equipment, laptops, and case materials delivered using FedEx.

Since some field staff give FedEx blanket permission to leave packages without a signature, you must use a SIGNATURE REQUIRED label or write on the address form that the signature is required any time you are instructed to use FedEx to ship case materials to Westat or to another interviewer.

To ensure proper billing of FedEx shipping charges to NFS Field Test, use a preprinted airbill with the Westat billing account number (0200-0361-8) and record the NFS Field Test project number as the internal billing reference number: **6565.01.10.03**.

Use FedEx Express Saver service. Please be sure to double check that you have marked the correct box. Some information on the airbill may be prefilled, but you will need to write in other information.

You will enter the FedEx tracking number in the IMS Shipments link for the case materials you send to Westat using FedEx.

8.4.2 Completing the FedEx Airbill

FedEx will not transport any item without a completed airbill. FedEx uses it to determine where the package goes and which account to bill. The format of FedEx labels vary somewhat, but generally they have eight sections. To fill out a FedEx airbill for returning NFS Field Test equipment, please contact the NFS Field Test Help Desk for instructions on how to complete the FedEx airbill.

8.5 Bulk Supplies and the NFS Field Test Warehouse

You will receive your bulk supplies after training. However, you may need additional supplies during the field period. We encourage all field staff to monitor the inventories of their various supplies throughout the field period. A list of these supplies is displayed in Table 12-1.

We will attempt to mail all the supplies you will need in this first shipment. However, alert your supervisor if you feel you will need additional supplies before they are completely depleted. This will avoid last-minute requests for supplies and ensure that you always have the materials you need to perform your job efficiently.

Order all supplies by sending a BSM message to your supervisor using the list in Table 12-1.

Here are the steps to take to create a BSM message to request supplies:

1. Type your supervisor's name into the "To:" field.
2. Type your name and "supplies needed" in the "Subject:" field.
3. In the body of the message, type your
 - Name;
 - Your ID;
 - Address and telephone number where you want the supplies sent;
 - Date needed;

- Item #, item name as it appears on the materials list (Table 12-1) and quantity; and
 - List one item per row.
4. Click Send.

Your supervisor will approve and forward your request to the NFS Field Test Help Desk. The Help Desk will ship the requested materials to you.