

AIESEC US Account Delivery Handbook

Welcome to the world of account delivery! This handbook and set of accompanying documents are designed to complement any training that you may have already received but also provide an untrained person with all the information and documentation that one would need to successfully deliver on an account! If you have any questions, please don't hesitate to contact me at Callahank@aiesecus.org and I will do my best to help you out in any way possible.

@ly,
Callahan
MC VP Account Delivery

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Getting Started with Account Delivery

As the Account Delivery person at your LC, you are the face of AIESEC U.S. to each customer and for each incoming participant who arrives in the country. The personal interactions and connections you will have with the company and participants make this an extremely rewarding role in AIESEC U.S. This is a position that allows you to directly be involved in achieving AIESEC U.S.' mission to impact individuals through exchange. The following is an overview of the Account Delivery person's responsibilities.

- Responsible for understanding the history of all accounts signed by your LC.
- The main point of contact for ongoing support and responsible for ensuring that each trainee has the opportunity to be integrated into the receiving Local Committee.
- Provide support regarding J1 visa program requirements to the company and its selected participants during the visa application process and throughout the duration of the training program
- Support corporate customers to create high quality internships and professional training programs that are compliant with government visa regulations
- Coordinate the international relocation of interns and trainees selected by the company
- Coordinate all services contracted between the customer and AIESEC US.
- Provide orientations on visa regulations and program requirements to new participants in the J1 program
- Recruit, screen, and select international undergraduate and graduate talent from the international AIESEC pool to fill open positions within customers' networks
- Be able to provide training within your Local Committee and other Local Communities around account delivery.
- Contribute to the enhancement of internal processes for more efficient and satisfactory delivery on AIESEC US services
- Develop and maintain any necessary vendor relationships to deliver on the contract
- Responsible for gaining a general understanding of myAIESEC.net and being able to use the Leadership stage.
- Must have a general understanding of the Business Development Sales Process and where checkpoints are for MC involvement
- Responsible for fully understanding the financial and administrative tasks associated with LC Account Delivery within the appropriate timeline.

Account Delivery Training Plan

Topic	Components
Orientation	
Overview of Account Manager Responsibilities and Process	Go over what the roles and responsibilities are of the Account Manager, the host company, and the intern/trainee and where the MC must get involved. It begins with the visa paperwork, delivery, and reception weeks, etc. Discuss where the Account Manager fits into the overall process.
J1 Visa Training	Go through J1 Visa Training. Before hand, read the AIESEC US J1 Program Handbook and prepare questions.
Advanced Training on J1 Program Application	In depth look at the J1 Program Application, what to look for when collecting paperwork from the company and the participant and how to provide assistance to the company when completing the application
Sourcing	How to analyze what the company is looking for, preparing, promoting, and seeking candidates to submit to the company.
Reception Services	Training on how to make pre-arrival arrangements for incoming trainees, logistics, payment coordination, pre-arrival communication, etc. Training on reception activities: drivers license laws, opening a bank account, applying for social security, AIESEC paperwork, etc.
Financial Processes	Understanding account budgets, learning how to finance receptions and other services, allocation, requesting an invoice from the MC, and reimbursements.
Ongoing and Administrative Responsibilities	Be aware of processes around AIESEC evaluations, travel validation, program validation (PVF), early departure, and extensions. Maintaining a database of the trainees at your LC that contains: start and end date, contact information, and address. Keeping the trainee involved with the LC. If unusual situations arise, be aware of what to do.

AIESEC US PROGRAM TIMELINE

Pre-Contract

- Initial Meetings with Company
- Determine services that the company wants
- Need to have the Host Company review the *Host Company Handbook*
- Collect the *Written Training Plan* and *J1 Program Application – Host Company Information* to MC VP Account Delivery for compliance check
- Have the company fill out the *AIESEC US Sourcing Criteria* and then check for availability of suitable candidates (If Applicable)
- Sign Contract with the Host Company
- Collect payment for single exchange fee to AIESEC US

Sourcing

****allow 3-4 weeks for sourcing and selection of a candidate. Additional time may be needed if a second round of candidates is requested. Timeline varies per customer.***

J1 Program Application

****To be correctly completed at least 1 month prior to participant's program start date.***

- Work with MC VP Account Delivery to complete the J1 Program Application
 - Host Company Information
 - Participant Information
 - Original Company Acceptance Letter
 - Written Training Plan
 - DS7002
- Submit completed J1 Program Application and Per Exchange Fee payment to AIESEC US
- MC VP Account Delivery will review completed application (approx. 2-3 days)
- MC VP Account Delivery will issue DS2019 Exchange Visitor Eligibility Form to Participant (approx 2-5 days for shipping)

J1 Visa Application and Interview

- Participant makes appointment at US consulate in home country
- Participant completes all necessary documents required by their home country's consulate
- Participant attends visa interview appointment
- Refer participant to the appropriate consulate website for additional information about the process and what is to be expected.
- J1 Visa is sent to participant approximately 1 week* after appointment (*wait time varies per consulate)

Pre-Arrival

- AIESEC US will provide orientation to J1 Visa Regulations
- The LC will provide cultural preparation to the participant
- AIESEC US will secure health insurance coverage and pay the premiums for the participant
- Participant submits Pre-Arrival Acknowledgement form to the MC VP Account Delivery
- Depending on the services that the company has selected, the LC will begin preparing logistics for participant's arrival with assistance of the MC VP Account Delivery if necessary.

During the Program

- The LC will provide reception services to participant upon arrival, at minimum airport pickup, social security and bank account assistance.
- Participant submits Program Validation Form (PVF) to MC VP Account Delivery within 10 days of arrival
- Participant and Host Supervisor will complete Initial, Midpoint, and Final Evaluations for the program and submit them to MC VP Account Delivery
- Participant should stay connected to local AIESEC US chapter
- AIESEC US will maintain and follow up with any additional services that were requested by the company

AIESEC US PROGRAM TIMELINE – BREAKDOWN

**Denotes steps in the timeline from the company's perspective. A list of documents/knowledge required to complete the step will be listed as well. These supplemental documents can be found in the APPENDICES.*

Pre- Contract

**Select services that AIESEC US will provide*

- Review BD Guide and be familiar with all sales and delivery processes as well as the services and pricing for a single exchange.**

**Need to have the Host Company review the Host Company Handbook*

**Collect the Written Training Plan and J1 Program Application – Host Company Information to AIESEC US for compliance check*

**Submit AIESEC US Sourcing Criteria to check for availability of suitable candidates (If Applicable)*

- At this point, the person responsible for account delivery should be introduced to the customer, if necessary.**
 - Person responsible for account delivery sends the Host Company Handbook to the customer and sends the training plan and J1 Host Company Application to the MC VP Account Delivery.**
 - If compliant, move forward – if not, work with customer to create compliant plan and resubmit to the MC VP AD.**
 - Determine research on the EP pool to determine the availability of suitable candidates and develop relationships with other AIESEC countries if necessary.**

- Review the AIESEC US Program Timeline for Host Companies with the Host Company**

- AIESEC US Host Company Handbook
 - AIESEC US Sourcing Criteria Document
 -AIESEC US Program Timeline for Host Companies

**Sign Contract with Host Company*

- Send a copy of the contract to the MC VP AD**

** Collect payment for single exchange fee to AIESEC US*

- The person responsible for account delivery submits a request to MC VP AD for an invoice. Request should include:**
 - Company contact name and address**
 - Account name**
 - Amount to be billed**
 - Invoice type: Administration Fee**
 - AIESEC US will bill the company on the LC's behalf**
-

SOURCING

Preparation Phase

** The following list has suggestions for marketing materials that have been used in the past. Depending on the position and the customer, you may use all or just a few of these options. For single exchanges, it may be best to skip this step and begin with promotion on myaiesec.net.*

- Create customized application for the open position (best used for multiple openings of the same training position)
- Create one pager to promote position and company. Include information about:
 - Position(s) available
 - Qualifications
 - Duration
 - Location
 - Eligibility
 - Compensation
 - How to apply
- Create PowerPoint presentation to promote position(s) and company
- Create standardized email to potential candidates
- Prepare an interview questionnaire to use during interviews

- Interview Evaluation Form
- Sample Materials Available Upon Request

Promotional Phase

- ❖ MyAIESEC.net
 - Open position on myAIESEC.net (create TN form)
 - Create a Wiki on myAIESEC.net outlining application process or upload a document on the TN form
 - Post news item on myAIESEC.net about new open position available in the US
 - Post informational materials in file section
 - Post a Classified
 - Post in all relevant forums
 - Search EP database and email potential candidates with information and application materials
 - Use Available Forms Tracker to filter potential candidates and spam them
 - ❖ International AIESEC network
 - Work with the MC to contact the national level of @ in country/countries to begin building relationship and/or notify them of new open positions in US (if specific countries are specified)
 - If specific countries are not requested, send email to all VPX in @ network, notifying them of open position
-

Selection Phase

- Ensure candidates have turned in correct/completed applications (resumes, cover letters, customized applications –if applicable)
- Review applications to ensure candidate meets J-1 visa eligibility requirements. Evaluate candidates qualifications for the position they applied for. If you have any questions as to whether they meet the requirements, contact the MC VP AD for clarification
- AIESEC Prescreen Interview:
 - Coordinate a time with the candidate for the interview
 - Obtain calling card/use Skype to conduct interview

- Use interview questionnaire document to take notes during interview
- After interview, complete the interview evaluation form to submit to the customers
- Submit short list to MC VP AD for J1 eligibility verification
- Notify candidates that they have been placed on the Short List after receiving confirmation of their verification for the MC VP AD
- Submit applicant applications to customer
- Notify candidates of acceptance/denial.

J1 Program Application

**Work with AIESEC US to complete the J1 Program Application*

- The person responsible for delivery collects the following documents from the customer and then submits them to the MC VP AD:
 - J1 Program Application – Host Company (if not previously submitted)
 - J1 Application Instructions
 - DS7002 Form
 - An original company acceptance letter
- The person responsible for delivery collects the following documents from the participant and then submits them to the MC VP AD:
 - J1 Program Application – Participant
 - CV/Resume
 - Academic Credentials
 - Photocopy of passport

- DS7002
 -Sample DS7002
 - Sample Written Training Plan
 -J1 Program Application – Host Company
 - J1 Program Application – Participant
 - J1 Program Application Instructions

**Submit completed J1 Program Application and Per Exchange Fee payment to AIESEC US*

**MC VP Account Delivery will review completed application (approx. 2-3 days)*

Person responsible for account delivery collects and reviews *all parts* of the J1 Program Application. When reviewing check for the following:

- If any part of the application is missing or incorrect, the LC account delivery person follows up with the customer/participant to collect the appropriate information as few times as possible
- Person responsible for account delivery compiles all documents into a folder and adds the following:
 - J1 Program Application Checklist
- When the application is complete and the person responsible for account delivery is confident that it is compliant and complete, then submit it to the MC VP AD for final checks.

-J1 Program Application Checklist

** MC VP Account Delivery will issue DS2019 Exchange Visitor Eligibility Form to Participant (approx 2-5 days for shipping)*

- Send notification to customer and participant that documents have been shipped. Include the tracking number so they can follow the shipment.

J1 Visa Application and Interview

**Participant makes appointment at US consulate in home country*

**Participant completes all necessary documents required by their home country's consulate*

**Participant attends visa interview appointment*

**J1 Visa is sent to participant approximately 1 week* after appointment (*wait time varies per consulate)*

- Determine which consulate the participant will be going to and guide them to the US Consulate website for instructions on how to arrange an appointment for a visa interview**
- Also send link to US Consulate website page containing list of additional documents needed to attend visa interview**
- Be sure that the participant informs the person responsible for account delivery of the date of their consulate appointment and when they receive their J1 Visa.**
- Alert the MC VP AD of when the participant receives their visa and when they are due to arrive.**

Pre-Arrival

**AIESEC US will provide orientation to J1 Visa Regulations*

**AIESEC US will secure health insurance coverage and pay the premiums for the participant*

**The LC will provide cultural preparation to the participant*

**Participant submits Pre-Arrival Acknowledgement form to the MC VP Account Delivery*

**Depending on the services that the company has selected, the LC will begin preparing logistics for participant's arrival with assistance of the MC VP Account Delivery if necessary.*

Reception – Pre-Arrival Checklist

Arrival Date	Company
Trainee(s)	
Dependent(s)	

Once the trainee confirms with the person responsible for account delivery that he/she has received their J-1 visa, the person in charge of account delivery will then notify the MC VP AD of the trainee's arrival. At this time, the person in charge of account delivery will have a series of pre-arrival communication with the trainee and will make the necessary arrangements to prepare for the reception.

- Welcome Email to the Trainee
- Send email to current trainees and LCs to introduce new trainee
- Get Trainee's flight information and airport pick-up information
- Reserve hotel room (if applicable)
- Reserve car service to pick up trainee from the airport
- Provide support around finding housing and transportation
- Inform the Host Supervisor when the trainee is due to arrive and help coordinate a first day
- Announce the trainee's arrival to the Local Committee
- Schedule Welcome Dinner at a time when other members of the LC can participate
- Make reservations for Welcome Dinner (if necessary at selected restaurant)

Reception – Pre-Arrival Planning Guide

Welcome Email	Date Sent:	
Flight Information	Airline:	Flight Number:
	Estimated Time of Arrival:	# of Luggage:
Reserve Hotel	Hotel Name & Address:	
	Phone Number:	Room Number(s):
	Confirmation # for Reservation:	Smoking/Non-Smoking:
Car service for airport pickup (if necessary)	Company Name & Address:	
	Phone Number:	Pick Up Date/Time:
	Reservation #:	Drop Off Date/Time:
	# of Passengers:	Vehicle Size:
Housing	Trainee's Address:	
	Phone Number:	Lock Box Code:
	Directions:	
Rental Car	Will Trainee be receiving a rental car? Yes <input type="checkbox"/> Not Applicable <input type="checkbox"/>	
	Company Name & Address:	
	Phone Number:	Pick Up Date/Time:
	Reservation #:	
Welcome Email to Manager	Manager Name/Email:	Date Sent:
	Arrangements for Trainee's First Day of Work:	
Local Committee	Date Announced to LC:	
Reception Signups	Participating Members:	
	:	

Welcome Dinner	Restaurant:		
	Phone Number:	Number Attending:	Date:
Driving Lessons (if necessary)	Company & Address:		
	Phone Number:	Scheduled Assessment Date:	
Notes			

Reception – Orientation Week Checklist

The person responsible for account delivery is responsible for making sure that each trainee has a complete orientation to AIESEC U.S. and that each trainee receives assistance with everything from social security to bank accounts and making sure they feel welcome in the Committee.

<input type="checkbox"/> Coordinate a time to greet the trainee once they arrive at airport
<input type="checkbox"/> Give trainee orientation to AIESEC U.S.
<input type="checkbox"/> Assist trainee with opening a bank account
<input type="checkbox"/> Assist trainee with applying for a social security number
<input type="checkbox"/> Take trainee to written driver's license exam (if applicable)
<input type="checkbox"/> Take trainee to road skills exam (if applicable)
<input type="checkbox"/> Help trainee move into their apartment
<input type="checkbox"/> Help trainee become familiar with their neighborhood
<input type="checkbox"/> Take trainee to their first day of work to meet their host supervisor
<input type="checkbox"/> Welcome basket
<input type="checkbox"/> Welcome dinner
<input type="checkbox"/> Help the trainee set up a cell phone

Reception – Orientation Week Planning Guide

Meet & Greet	Date/Time:	Place:
	Did the trainee remember to bring the following documents: <input type="checkbox"/> DS2019 <input type="checkbox"/> DS7002 <input type="checkbox"/> J-1 Visa	<input type="checkbox"/> Passport <input type="checkbox"/> I-94 <input type="checkbox"/> Company Acceptance Letter <input type="checkbox"/> Home Country Driver's License <input type="checkbox"/> AIESEC U.S. Sponsorship Letter
Bank Account	Bank Name & Address:	
Social Security	Office Location:	Received proof of application letter (Numident Form)? Yes <input type="checkbox"/> No <input type="checkbox"/>
Driver's License	Exam Station Location:	Written Exam: Passed <input type="checkbox"/> Did not Pass <input type="checkbox"/>
		Road Skills Test: Passed <input type="checkbox"/> Did not Pass <input type="checkbox"/>
Move In Neighborhood	q Make sure Trainee feels comfortable in their new home. Remember to tell them that when they leave, the apartment must be in the same condition as it was when they moved in. Show them how to use the vacuum cleaner, dishwasher, washer/dryer if needed. Offer to take them to the store if needed.	
	<input type="checkbox"/> Make sure the trainee knows where the office is located, as well as the closest bank, grocery store, laundromat, etc.	

Reception – Post-Arrival and Ongoing Integration

Administration

Once the trainee is all moved in and settled, there are still a few loose ends for the person responsible for account delivery to tie up at the end of reception week. You must make sure that the trainee turns in all of the AIESEC U.S. paperwork required for visa compliance. You must also make sure that all of the finances are in order within one week of reception. You should submit the following documents to the MC VP AD within the appropriate timeframe indicated below.

<input type="checkbox"/> Program Validation Form	Within 5 days of the Trainee's arrival to the U.S.
<input type="checkbox"/> AIESEC US Reimbursement Form and receipts	Within 15 days of the Trainee's reception week

From time to time, trainees may contact you to ask about traveling outside of the U.S., extending their traineeship, or ending their traineeship early. In these cases, you should refer them to the MC VP AD for more information.

Integration

One of the main reasons that AIESEC U.S. does exchange is so that individuals can have the opportunity to interact with and learn about other cultures. Because of this, it is very important that you help the trainee to feel comfortable and welcome in your Local Committee throughout their traineeship. Every trainee should be invited to the following:

<input type="checkbox"/> AIESEC U.S. National Conferences	Twice per year
<input type="checkbox"/> AIESEC U.S. Regional Conferences	Twice per year
<input type="checkbox"/> Local Committee Events	Varies per location

Integrating trainees is the responsibility of the Local Committee as a whole. As the person responsible for account delivery, you should develop a close relationship with other members of your LC, including the LCP and events coordinators to ensure that trainees are being invited to LC events and that there are events at your LC for them to go to. While the LC is responsible for providing a community for the trainee and organizing events that facilitate cultural exchange, the person responsible for account delivery is responsible for making sure the trainees have access to the Local Committee.

It is recommended that you keep track of which trainees are attending events and get feedback from them about their experiences. They may be interested in doing different kinds of activities or even give presentations about their culture to the LC. Getting the trainees involved with putting on events would be a great way to integrate them into the LC.

In addition to the events that your Local Committee is arranging, don't forget about the rest of AIESEC US LCs. Collaboration between LCs around events and trainee integration would be highly encouraged.

Budget

Each LC is given \$300 for reception activities. It is highly encouraged that you make a budget for this money and do not go over that budget as AIESEC US will not reimburse you for more. To be refunded your purchases you must submit your receipts to reimbursements@aiesecus.org along with the reimbursement form.

Opening a Bank Account

Part of AIESEC U.S. reception services are to help trainees with opening a bank account for them to deposit stipend payments and other funds. Many American companies issue pay through "direct deposit," rather than traditional checks. This means that the host company deposits the trainee's pay directly into their checking and/or savings account, which saves them time because going to the bank is not necessary. Direct deposit combined with the internet banking access that most large banks offer allows the trainee to manage their funds according to their schedule and needs.

Opening a Bank Account – In order to open an account at most US banks, the trainee must present the following forms of identification:

- ✓ passport
- ✓ driver’s license, state identification card, or other form of photo identification
- ✓ Social Security card, the letter of application is usually sufficient
- ✓ Proof of residence – housing lease, or a utility bill mailed to the trainee’s home address is usually sufficient
- ✓ Letter from host company or AIESEC U.S. identifying them as a trainee exchange visitor

Both checking accounts and savings accounts are available to trainees. You should explain to them that:

- Checking accounts allow easy access to deposit and withdraw money as needed. Checks are accepted for bills and some purchases. Most Americans who use checking accounts access their funds through Automated Teller Machine (ATM) cards. “Check cards” are ATM cards backed by Visa or MasterCard. Many banks issue these types of ATM cards so that you are able to use your ATM card to pay for goods or services. Payments made with check cards automatically deduct funds from your checking account. This service must be requested at the time you open your account. With an ATM or check card, you can access your bank account to withdraw cash or verify your balance 24 hours a day from any ATM owned by your bank. For an additional fee (usually \$2 per session) you may use another bank’s ATM or public ATM to communicate with your bank. Savings accounts are interest bearing accounts. Access to your cash is limited and withdrawals are restricted, however all deposits earn interest, so this may be a good option if you would like to save a portion of your stipend during your program.

Most bank accounts charge a small fee (\$3-5) each month for managing your account. Some banks have a minimum balance requirement, but all banks charge an “overdraft” service fee of \$25 - \$30 for each transaction that takes your balance below the minimum, or creates a negative balance. Service fees add up quickly, so it is important to balance your account regularly.

Credit Cards – Most Americans have credit cards because they’re a convenient way to make large purchases, and are accepted at nearly all stores and businesses. If you have a credit card in your home country, AIESEC U.S. suggests that you bring it with you for emergency purchases during your program.

Traveler’s Checks – Traveler’s checks are a safe alternative to cash. They can be purchased at any bank and are replaceable if stolen. When you purchase traveler’s checks, buy them in small denominations and keep a list of the check numbers in a safe place. Most stores and businesses accept traveler’s checks, but you will have to present identification or your passport to use them.

Western Union – This option allows you to transfer money from anywhere in the United States to anywhere in your home country within 15 minutes on any day of the week. Money can also be transferred from your home country to anywhere in the United States. There is a handling charge for each transaction that varies based on the total transferred. Call +1 800 325 6000 to find the Western Union nearest you and the recipient of the funds.

If the trainee does not plan to open a bank account during their program, advise them to make sure that they have access to sufficient funds during their program.

Social Security

In order to work or train legally in the United States, trainees must have a Social Security card. To receive a Social Security card, they must apply for one in person at the nearest Social Security office. To find the office nearest you, call the Social Security Administration toll-free at +1 800 772 1213 or visit their website at <http://www.ssa.gov>.

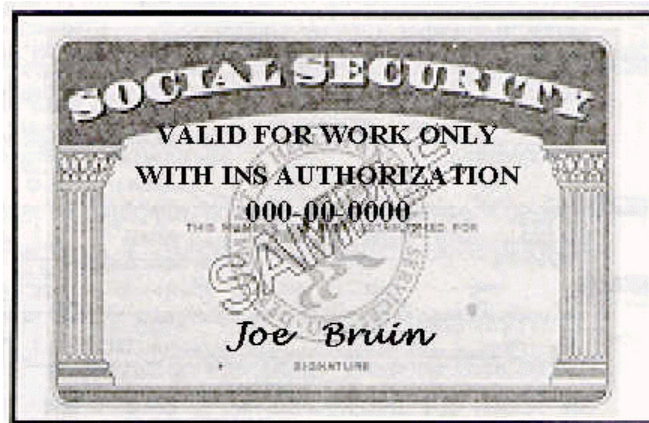
First, you must have the trainee complete AIESEC U.S.’s Program Validation Form (PVF) and return it to AIESEC U.S. so that their program can be validated in SEVIS. The Social Security Administration is unable to process requests for Social Security cards

from Exchange Visitors whose programs have not yet been validated. We usually recommend that trainees make arrangements with their host company to wait for 10 to 12 days to apply for their Social Security card after they arrive and register their U.S. address with AIESEC U.S. For this account, however, it is required to take the trainee to the social security office if they apply for a Social Security card before submitting their address to validate their program, their Social Security card may not be granted, and they will have to reapply.

At the time you take the trainee to visit the Social Security office to apply for their card, you must make sure they bring the following original documents PLUS one photocopy of each:

- ✓ Completed Social Security application (available at the Social Security office)
- ✓ Passport and J-1 visa
- ✓ AIESEC U.S. sponsorship letter
- ✓ Company Acceptance Letter
- ✓ DS-2019
- ✓ I-94 card

After the trainee has filed their application for a Social Security card with a Social Security agent, they will receive a Proof of Application receipt. If the agent does not offer them this receipt, you must make sure they request it. This document is necessary in the event they must contact Social Security to follow up on your application status. A successful application should be processed within three weeks to two months. The trainee should receive their card 7 to 10 business days after the application is processed.



If the application is not approved, the trainee will receive an official statement from the Social Security Statement by mail. Usually when an Exchange Visitor's application is denied, it is because the applicant's program was not yet validated in SEVIS at the time of the application, or because there is an error in the USCIS data that was recorded at the time the applicant arrived to the United States. Advise the trainee that if they receive such a letter, they should contact AIESEC U.S. for assistance in confirming their SEVIS validation. Once their validation is confirmed, they must visit the Social Security office in person.

During the period when the trainee is waiting for their Social Security card, their host company is legally allowed to issue their stipend. Advise the trainee that if their supervisor has questions about issuing their stipend or reporting wages, to please ask them to contact the Social Security Administration or visit the following website: <http://www.ssa.gov/employer/hiring.htm>.