Payroll Training
Summer Session 2021

June 2, 2021
Agenda

What’s New for Summer Session 2021

Processing Payments for Faculty and Lecturers

Processing Payments for Graduate Students

Q & A

Summer Session - Lisa Bargabus

Academic Personnel - Kelly Maheu & Heather Zion

Graduate Division - Courtney Aguila, Kacy Cashatt, & Laura Jimenez
<table>
<thead>
<tr>
<th>Session</th>
<th>Course Dates</th>
<th>Monthly Pay Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session 1 - 5 Weeks</td>
<td>6/28/21 - 7/31/21</td>
<td>7/30/21</td>
</tr>
<tr>
<td>Session 2 - 5 Weeks</td>
<td>8/2/21 - 9/4/21</td>
<td>9/1/21</td>
</tr>
<tr>
<td>Special - 3 Weeks 1 of 3</td>
<td>6/28/21 - 7/17/21</td>
<td>7/30/21</td>
</tr>
<tr>
<td>Special - 3 Weeks 2 of 3</td>
<td>7/19/21 - 8/7/21</td>
<td>7/30/21</td>
</tr>
<tr>
<td>Special - 3 Weeks 3 of 3</td>
<td>8/9/21 - 8/28/21</td>
<td>9/1/21</td>
</tr>
<tr>
<td>Special - 6 Weeks</td>
<td>8/2/21 - 9/11/21</td>
<td>9/1/21</td>
</tr>
<tr>
<td>Special - 8 Weeks</td>
<td>6/28/21 - 8/21/21</td>
<td>7/30/21</td>
</tr>
<tr>
<td>Special - 10 Weeks</td>
<td>6/28/21 - 9/4/21</td>
<td>7/30/21</td>
</tr>
</tbody>
</table>
### Summer Session 2021 - What’s Happening Now?

- **33,933 enrollments** - Down 8% from 2020
- **13,372 headcount** - Down 2% from 2020
- **3,786 on waitlists** - Down 46% from 2020

<table>
<thead>
<tr>
<th>APRIL</th>
<th>MAY</th>
<th>JUNE</th>
<th>JULY</th>
<th>AUGUST</th>
<th>SEPTEMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolling</td>
<td>management of the waitlist begins.</td>
<td>Session 1 classes begin 6/28/21.</td>
<td>Session 2 fees due.</td>
<td></td>
<td>Reporting begins</td>
</tr>
<tr>
<td>in Classes.</td>
<td>Student fees assessed.</td>
<td>Session 2 student fees assessed.</td>
<td>Faculty Pay Date 7/30/21.</td>
<td></td>
<td>Faculty Pay Date 9/1/21</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(Session 1 + July Special</td>
<td></td>
<td>(Session 2 + August Special Sessions)</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Sessions)</td>
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<td></td>
</tr>
</tbody>
</table>
Summer Session Payroll = Teamwork!

- Academic Personnel
- Summer Session
- Graduate Division
- Academic Units
Remote Teaching Okay for Faculty & Lecturers

UCOP HAS NOT YET APPROVED INTERNATIONAL GRADUATE STUDENTS TEACHING REMOTELY!

Monthly APS Announcements - April 6, 2021

International Tele-Work

Per UCOP guidance, academic appointees who are subject to travel restrictions or are not able to obtain work authorization may continue to be appointed from abroad through the Summer 2021. International work agreements will not be extended beyond the summer quarter. Academic appointees will be required to have work authorization and be in residence for fall quarter service or other arrangements will need to be made, such as delayed start dates or leaves. Please contact Academic Personnel Services with questions.

Temporary Remote Agreement:

https://aps.ucsd.edu/faculty-resources/covid-19/leavefaq.html#Temporary-Remote-Work-Agreement
New Process to set-up Early Canvas Access for New Instructors

Summer Session is providing a list of instructors to the Canvas team.

The Canvas Team will reach out to department IT staff to set instructors up early. (Similar to the process used during the current Academic Year.)
Unit 18 Lecturers no longer need Union (UC- AFT) Permission to teach Independent Studies in Summer Session.

The Union reached out to Labor Relations to confirm that per Article 23 of the MOU, the University is not obligated to abide by the UC- AFT and UCSD local agreement in the summer.

For Independent Studies classes in Summer Session - requests in EASy will no longer route to the Union (AFT) and Divisional Dean's offices for approval.
How the Financials Work

Instructor Pay
Summer Session pays the instructor.
Not part of your department FTE.

TA Allocation
Formula based on number of classes (more than 10 students), total enrollment, and your department PRC ratio. See Guidebook, page 41.

A new TA Allocation model for the campus is being implemented Fall Quarter. It will be used for Summer Session 2022.

Incentive Pilot Program
Departments that offer more courses and teach more students than in 2018 will receive
$1,000 per course + $25/$50 per student.

Departments that do not exceed 2018 courses and enrollments receive
$500 per course + $13/$33 per student.

Courses and enrollments will be measured September 7, 2021.
Summer Session Appointments

Teaching 1 Class 50% Appointment
Teaching 2 Classes in the same Session 100% appointment

Maximum number of Summer Session Classes: 4

Full Course Salary

- 4 Unit Course  8.5% annual salary
- 1-2 Unit Course  4.25% annual salary

Contingent Salary for low enrollment (< 15 students)

$150 × # of Units × # of Students

- 4 Unit Course  $600 per student
- 2 Unit Course  $300 per student
Ladder Rank Faculty & LSOE/LPSOE cannot earn more than 1/9th annual salary per month.

We need to spread payments for faculty teaching two courses in the same session.
   Payment for two courses is 17% annual salary
   1/9th is about 11% annual salary

Faculty teaching 4 courses can earn up to 3/9ths over 3 months:
   1/9th in July
   1/9th in August
   1/9th in September

Other Restrictions

Fiscal Year staff can earn up to 1/12th annual salary in additional Summer Session compensation.

Recall faculty can be paid 43% of their monthly earnings for July-September.

Maximum earnings for all Summer Session instructors - 33% annual salary (3/9ths).
Review: Hiring Faculty, Recalls & Lecturers
Hiring Lecturers Who Taught During the 2020-2021 Academic Year

**SUMMER SESSION**

1. **Email appointment letter**
   - **DONE**

2. **Add name to Schedule of Classes**
   - **DONE**

**ACADEMIC DEPARTMENT**

3. **START Enter Name in ISA**
   - **DONE**

4. **Create position and hire in UCPath (Rehire, Concurrent hire) NO COMPENSATION**
   - **DONE**

5. **JUNE/JULY - Add additional pay onto SS position/job via PayPath**

**INSTRUCTOR**

6. **Accept appointment via email**
   - **DONE**

**DEAN OF UNDERGRADUATE EDUCATION**

**JANUARY - JUNE**

**JUNE - JULY**
Hiring Lecturers Who Did Not Teach in the 2020-2021 Academic Year, and Recall Faculty

SUMMER SESSION

START
Enter Name in ISA

DONE

Submit appointment file via Interfolio

DONE

Review appointment file

DONE

Email appointment letter

DONE

Add name to Schedule of Classes

DONE

JUNE/JULY - Add additional pay onto SS position/job via PayPath

ACADEMIC DEPARTMENT

Find replacement

DONE

CREATE POS
Create position and hire in UCPath (New hire, Rehire, Concurrent hire)

NO

COMPENSATION

DONE

INSTRUCTOR

Accept appointment via email

DONE

DONE

DEAN OF UNDERGRADUATE EDUCATION

Appointmen approved?

DONE

JANUARY - JUNE

JUNE - JULY
**POSITIONS**

Okay to Reuse Positions from Summer Session 2020.
* You must change the funding if it differs.

Start the Position 1 month before the Hire Start Date (to have enough effective dated rows for corrections).

Job Code = 001550
FTE = 0

**HIRES**

Choose the right template:
New Hire / Rehire / Concurrent Hire

Effective Date = Beginning of summer pay period 7/1/21 or 8/1/21

Expected Job End Date = Last day of pay period they will be paid 7/31/21 or 8/31/21 (9/30/21 if needed)

On the **Job Data** tab:
1. Job Compensation section is left blank. Do not enter any **Comp Rate Codes** or **Amounts**.
2. **FTE** is 0
3. Note in your **Comments** to UCPC that the job compensation should be 0, and that the Lecturer will be paid via Additional Pay.

Job Aid: How to Process Payments for Lecturers in Summer Session
https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions
<table>
<thead>
<tr>
<th>POSITIONS</th>
<th>HIRES</th>
</tr>
</thead>
</table>
| Okay to Reuse Positions from Summer Session 2020.  
* You must change the funding if it differs. |
| Use Concurrent Hire Template |
| Start the Position 1 month before the Hire Start Date (to have enough effective dated rows for corrections) |
| Effective Date = Beginning of summer pay period 7/1/21 or 8/1/21 |
| Job Code = 001700  
FTE = 0 |
| Expected Job End Date = Last day of pay period they will be paid 7/31/21 or 8/31/21 (9/30/21 if needed) |
| On the Job Data tab: |
| 1. Job Compensation section is left blank.  
Do not enter any **Comp Rate Codes** or **Amounts**. |
| 2. **FTE** is 0 |
| 3. Note in your **Comments** to UCPC that the job compensation should be 0, and that the employee will be paid via Additional Pay. |

Job Aid: How to Process Summer Salary for Professors, LSOE, and Recalls  
[https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions](https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions)
Hiring FY Appointees (Staff, Postdocs, Researchers), or Faculty from other UCs

1. DEAN OF UNDERGRADUATE EDUCATION
   - Appointmen approved?
     - Yes: Proceed to next step.
     - No: Find replacement.

2. INSTRUCTOR
   - Accept appointment via email

3. ACADEMIC DEPARTMENT
   - Enter Name in ISA
   - Find replacement
   - Submit appointment file via Interfolio
   - Review appointment file

4. SUMMER SESSION
   - Email appointment letter
   - Add name to Schedule of Classes
   - Special Handling as Needed
     - NO COMPENSATION

5. JUNE/JULY - Add additional pay onto SS position/job via PayPath

Special Handling for FY Appointees

Reduce FTE on current FY appointment to fit a 50% (or 100%) Summer Session teaching appointment during the July or August pay period.

Alternatively, accrued vacation time can be used.

If postdoc is here on a visa, check with the International Faculty & Scholars Office (IFSO).

Certain visas do not allow teaching.
Special Cases - Adjunct Professors

Can teach Summer Session on their current title/job.

However - Special Handling is required if they are without salary.

You need to change the existing Adj Prof job for the Summer Session pay, and then change it back.

1. Remove the UCWOS comp rate and make it a 0 FTE job
2. After the Summer Session additional pay has processed, you will need to change the title/job back to UCWOS comp rate and the correct FTE.
Need a Temporary Remote Work Agreement. 
https://aps.ucsd.edu/faculty-resources/covid-19/leavefaq.html#Temporary-Remote-Work-Agreement

Taxes are different when not working in CA. 
Instructor must complete Out-of-State tax form (domestic) or Foreign Source Income Statement form (International). Instructions are here: 

Also materials in the UPK - Employee Self Service - Employee Actions: International Hire folder.

Tip - Be very clear and detailed in the initiator comments of the hire transaction. Make sure to state that the faculty is International, working remotely, and whether they have a United States SSN.
Special Cases - Visiting Professors

Eligible to teach Summer Session with a Visiting Professor job code

If they have a Visiting Prof appointment ending 6/30/21:

- Extend the end date
- Change the FTE to 0
  (Otherwise they will get paid from your department and Summer Session.)

Because they are only teaching, hiring as a 1550 Lecturer is also okay.

- If they had a 2020-2021 AY Visiting Prof appointment at UCSD, match that salary as close as possible on the Unit 18 scale.
NEW - How We Will Process Additional Pay for Faculty & Lecturers
NEW - Unit 18 Lecturer 1% Contractual Increase Effective 6/1/21

1% increase will be applied automatically in UCPath

FREEZE: 6/5/21 - 6/10/21

DO NOT Initiate or Approve any Unit 18 Entries in UCPath during the freeze.

Impact for Summer Session - All Lecturer course salaries need to be recalculated!

Course salaries are based on annual salaries in effect on 6/30/21.
NEW PROCESS - Mass Upload of Additional Pay for Faculty & Lecturers

Step 1 - Summer Session will fill-in mass upload templates with:

- Instructor Names
- Pay Dates
- Earnings Codes
- Payment Amounts
- Notes about payments from other departments, suggested spread for payments, etc.

Mass Upload templates will be uploaded to department folders on OneDrive: https://go.ucsd.edu/3cPRUEF. Same folder where your appointment letters are uploaded.
NEW PROCESS - Mass Upload of Additional Pay for Faculty & Lecturers

Step 2 - Academic Departments will fill-in Mass Upload spreadsheet with:

- Job Code
- Employee ID
- Position #
- Notes if the payment suggested by Summer Session needs to be adjusted (like if the faculty is getting other summer salary).

Departments will upload completed Mass Upload spreadsheet back to their department folder on OneDrive: https://go.ucsd.edu/3cPRUEF.

Add DONE to the end of the file name.
NEW PROCESS - Mass Upload of Additional Pay for Faculty & Lecturers

Step 3 - Academic Departments enter funding into UCPath for each instructor.

ASN or ACS Earnings Codes - as shown on the Mass Upload template

If faculty are teaching for multiple departments, funding needs to be split accordingly.

Summer Session will list other departments in the Notes column.

“Home” department needs to request chart string from other department.
Departments enter info into the yellow columns.

Departments enter/edit Notes to Summer Session as needed.

Spreadsheets will be in Department OneDrive folders: [https://go.ucsd.edu/3cPRUEF](https://go.ucsd.edu/3cPRUEF). Different Spreadsheet for each Pay Period.

<table>
<thead>
<tr>
<th>Employee Last Name</th>
<th>Employee First Name</th>
<th>Job Code</th>
<th>Summer Session</th>
<th>Empl Id</th>
<th>Empl Rcd #</th>
<th>Position#</th>
<th>Pay Period End Dt</th>
<th>Earnings Begin Dt</th>
<th>Earnings End Dt</th>
<th>Earnings Code</th>
<th>Amount</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Triton</td>
<td>Tommy</td>
<td>001506</td>
<td></td>
<td>CHAR(8)</td>
<td>10000013</td>
<td>0</td>
<td>07312021</td>
<td>07012021</td>
<td>07312021</td>
<td>ASN</td>
<td>4,840.00</td>
<td></td>
</tr>
<tr>
<td>Potter</td>
<td>Harry</td>
<td></td>
<td></td>
<td>CHAR(3)</td>
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<td>10001220</td>
<td>07312021</td>
<td>07012021</td>
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<td></td>
</tr>
<tr>
<td>Weasley</td>
<td>Ron</td>
<td></td>
<td></td>
<td>CHAR(3)</td>
<td>0</td>
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<td>07012021</td>
<td>07312021</td>
<td>ASN</td>
<td>9,680.00</td>
<td></td>
</tr>
</tbody>
</table>
| Granger            | Hermione            |          |                | CHAR(3) | 0          | 10001220  | 07312021         | 07012021         | 07312021       | ACS          | 10,430.00 | 10,430 in July + 10,430 in August ($20,860 total)
Mass Upload Spreadsheets for Faculty and Teaching Professors are not ready, yet.

Courses might be canceled.

Salaries might be reduced for low enrollment.

Contingent rate is: $150 \times \# \text{ of Units} \times \# \text{ of Students}
## Deadlines & Timing

<table>
<thead>
<tr>
<th></th>
<th>Summer Session Captures Enrollment</th>
<th>Summer Session Identifies Canceled Classes &amp; Reduced Salaries</th>
<th>Departments DOWNLOAD Mass Upload Spreadsheet from OneDrive</th>
<th>DEADLINE for Departments to turn-in Mass Upload Spreadsheet on OneDrive</th>
</tr>
</thead>
<tbody>
<tr>
<td>SESSION 1</td>
<td>6/2/21</td>
<td>6/7/21</td>
<td>6/21/21</td>
<td>7/2/21</td>
</tr>
<tr>
<td>SESSION 2</td>
<td>7/7/21</td>
<td>7/12/21</td>
<td>7/26/21</td>
<td>8/6/21</td>
</tr>
<tr>
<td>SPECIAL SESSION</td>
<td>Varies</td>
<td>Varies</td>
<td>6/21 or 7/26 Depends on the pay date.</td>
<td>7/2 or 8/6 Depends on the pay date.</td>
</tr>
<tr>
<td>JULY PAY PERIOD</td>
<td>AUGUST PAY PERIOD</td>
<td>SEPTEMBER PAY PERIOD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
<td>-------------------------------------------------------</td>
<td>----------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finish hiring Session 1 Instructors ASAP</td>
<td>Finish hiring Session 2 instructors ASAP</td>
<td>Download Mass Upload Spreadsheet from OneDrive - 8/23/21</td>
<td></td>
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</tr>
<tr>
<td><strong>UCPath FREEZE for Unit 18 Lecturers 6/5-6/10.</strong></td>
<td>Download Mass Upload Spreadsheet from OneDrive - 7/26/21</td>
<td>Fill-in your Spreadsheet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Download Mass Upload Spreadsheet from OneDrive - 6/21/21</td>
<td>Fill-in your Spreadsheet</td>
<td>Turn-in your filled-in Mass Upload Spreadsheet to OneDrive - 9/3/21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fill-in your Spreadsheet</td>
<td>Turn-in your filled-in Mass Upload Spreadsheet to OneDrive - 8/6/21</td>
<td>Add “DONE” to the end of the file - so I know you are finished.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turn-in your filled-in Mass Upload Spreadsheet to OneDrive - 7/2/21</td>
<td>Turn-in your filled-in Mass Upload Spreadsheet to OneDrive - 8/6/21</td>
<td>Assign position funding by 9/19/21.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign position funding by 7/19/21.</td>
<td>Assign position funding by 8/19/21.</td>
<td>Get chart strings from other departments as needed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Get chart strings from other departments as needed.</td>
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</tr>
</tbody>
</table>
Graduate Student Employment
General Employment Policy

- Obtain Academic Home Department approval to hire students in other departments
- Check eligibility (academic and financial)
- Check work permit end date
  - F1: see I-20
  - J1: see DS-2020
General Employment Policy (continued)

- Only enter approved appointments into UCPath
  - What if the class gets cancelled?
    - Student will move to a different job
    - Student will not move to a different job (no employment) - Freeze unfilled position OR process termination template on the effective date of the hire (ex: 07/01 hire date and not going to work, use 07/01 as the termination date)
Job Aid: How to Process Payments for Graduate Students in Summer Session

HOW TO PROCESS PAYMENTS FOR GRADUATE STUDENTS IN SUMMER SESSION

This job aid describes how to initiate summer payments to Graduate Student employees in the following titles:

- Associate In
- Teaching Assistant (TA)
- Reader/Tutor

Pre-Process
Departments are responsible for:

- Coordinating with Graduate Employment, Summer Session, and other departments to ensure percentage of appointment limits are not exceeded
- Looking the employee up on the Person Organizational Summary page to check for other active jobs at UCSD or other campuses
- Submitting transactions in time for approval before the Employee Data Change deadline on the Payroll Processing Calendar
Graduate Student Summer Employment

Hire grad stu as TA or Assoc in Summer

Existing Job in Relevant Department
- SP20 TA in COGS → S120 TA in COGS

Existing Job is Active
- Extend Appointment End Date in PayPath
- Change FTE to 0 on Position tab

Existing Job is on Short Work Break (SWB)
- Initiate Return from SWB in PayPath
- Change FTE to 0 on Position tab

No existing job in relevant dept
- Create position with Job Code + FTE=0
- Add funding for the new position on ASN Earn Code
- Hire into appropriate template

Reminder: extend Appointment End Date if appropriate

SP20 Assoc in T+LCh -> S120 Assoc in PHIL OR SP20 GSR -> S120 TA/Assoc

See other Decision Tree for what type of hire/transfer

Was the hire successfully processed by UCP?
Choosing the Correct Template

- Full Hire
- Rehire
- Concurrent Hire
- Interlocation Transfer

https://collab.ucsd.edu/x/rROYBQ
A Few Notes on Short Work Breaks

- Should be used ONLY to bridge students between appointments
- SWB should be used for a maximum of 4 consecutive months
Short Work Breaks

Example: Spring appointment ends 6/30 and next appointment does not begin until Summer Session II. You want to put student on a SWB until Summer Session II; Summer Session II starts 08/02, but we’re using pay periods only in UCPath

- Step 1: By 6/29, update the Expected Job End Date to 07/31 to accommodate the SWB duration OR through the end of Summer Session II if they will be in the same position (must be approved locally by 06/29)
- Step 2: Add SWB effective 07/01 with expected return date of 08/01
Additional Pay

Special Handling for Cancelling Additional Pay

You cannot delete a pending one-time payment or completely stop a new recurring additional pay on your own.

If you need to cancel an Additional Pay that has already been approved locally, you must submit a case to UCPC.
Mass Upload Additional Pay

- https://collab.ucsd.edu/x/iS_YBQ
- Associates - highly encouraged for all but not mandatory
- Teaching Assistants - highly encouraged if you have a large quantity
- We have a blank spreadsheet with instructions on Collab. Ultimately, we need:
  - Employee information
  - Position details
  - Pay period dates
  - Pay amount(s)
- You will need to create the Position, hire the person, and update funding ahead of submitting this info to us
- Timing
  - Positions created, people hired, funding added, Google Forms submitted
  - Due Dates:
    - Summer Session 1: 07/02
    - Summer Session 2: 08/06
    - Summer Session 3: Varies (need at least 10 business days prior to applicable payroll deadline)
Mass New Hire/Concurrent Hire

Info Session on Wednesday, June 16 from 9am - 10am

- Provide presentation and time for Q&A
- Walk-through of the spreadsheet creation and MS Teams Channel navigation
- Individuals must attend training session to be eligible for submitting these templates
- Minimum of 25 for upload
Additional Pay Tab

**Earnings Code:** ASN

**Pay Period Amt:**
The amount that will be issued each month

**Goal Amount:**
The total amount you want to pay over the earnings period (from begin to end date)

**FTE:**
Change FTE to 0 on Position Data

**Reason:**
New Additional Pay

**Effective Date**
- Summer Session I: 07/01/2021
- Summer Session II: 08/01/2021

**End Date**
- Summer Session I: 07/31/2021
- Summer Session II: 08/31/2021

**Verify Position #, Dept, & Job Code**

**Initiator Comments:**
See Comment Template (be sure to include comments on Job Data tab as well)

**Data Entry**
**Verify Data**
<table>
<thead>
<tr>
<th>New Additional Pay</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
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<tbody>
<tr>
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<tr>
<td>Effective Date</td>
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<tr>
<td>*Effective Date:</td>
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<td><strong>Payment Details</strong></td>
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<td>Pay Periods:</td>
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</table>
Job Code 001506 Associate-In at 50%
2nd Session (8/2/21 – 9/4/21) - Pay date 9/1/21

<table>
<thead>
<tr>
<th>New Additional Pay</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earnings Code:</td>
<td>ASN</td>
<td>Additional Comp-Summer-No 403</td>
<td>+</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Effective Date:</td>
<td>08/01/2021</td>
<td></td>
<td>+</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Effective Date:</td>
<td>08/01/2021</td>
<td></td>
<td>+</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Payment Details:</td>
<td></td>
<td>Reason: New Additional Pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addl Seq #:</td>
<td>1</td>
<td></td>
<td>+</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>End Date:</td>
<td>08/31/2021</td>
<td></td>
<td>+</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Pay Period Amt:</td>
<td>$4,765.00</td>
<td></td>
<td>+</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Goal Amount:</td>
<td>4765</td>
<td>Goal Balance:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prorate Additional Pay</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Applies To Pay Periods:
- First
- Second
- Third
Job Code 002310 Teaching Assistant (TA) at 50%
1st Session (6/28/21 – 7/31/21) - Pay date 7/30/21 & 2nd Session (8/2/21 – 9/4/21) - Pay date 9/1/21
### Transaction Comments Template - Monthly

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Associates-in</th>
<th>Teaching Assistant</th>
</tr>
</thead>
</table>
| **Full Hire /Rehire /Concurrent Hire**| [Hire] effective 07/01/21  
Summer Session I, Associate-In, 50.00% (0.00% FTE, flat-rate paid on Additional Pay)  
Course Dates: 06/28-07/31  
Course Payment: $4,765                                            |                    |
| **Extend End Date + FTE Change**      | Extend End Date effective [06/30/21] to [07/31/21]  
Change FTE effective [07/01/21] from [50.00%] to 0.00%.                                                                                          |                    |
| **Extend End Date + FTE Change + Additional Pay** | Extend End Date effective [06/30/21] to [07/31/21]  
Change FTE effective [07/01/21] from [50.00%] to 0.00%.  
Additional Pay effective 07/01/21-07/31/21  
Pay Period/Goal Amount: $4,765                                         |                    |
| **Additional Pay**                    | Additional Pay effective 07/01/21-07/31/21  
Pay Period/Goal Amount: $4,765                                                                                                                   |                    |
## Transaction Comments Template - Hourly

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Reader</th>
<th>Tutor</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full Hire /Rehire /Concurrent Hire</strong></td>
<td>[Hire] effective 06/28/21</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summer Session I, Reader, 25.00%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Course Dates: 06/28-07/31</td>
<td></td>
</tr>
<tr>
<td><strong>Extend End Date + FTE Change</strong></td>
<td>Extend End Date effective [06/30/21] to [07/31/21]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Change FTE effective [06/28/21] from [50.00%] to [25.00%]</td>
<td></td>
</tr>
<tr>
<td><strong>Extend End Date + FTE Change + Additional Pay</strong></td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Additional Pay</strong></td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Tips for Processing Summer Employment

Lessons learned from 2020

- Gather data before you begin
  - Empl ID
  - Reports to (Position number from UCPath)
  - Chart String information
  - Your transactor role and the people in your AWE
  - Job aids
- Add Comments to all the Comment fields
- Start as soon as possible!
Position Management for Summer v. Academic Year
We recommend having different positions for Summer v. Academic Year due to the changes you need to make (i.e. funding, FTE, etc)

Example:
1. Create Summer Session-specific positions for TAs/Associates who are paid via additional pay with FTE 0 and the appropriate Summer funding information.
2. Hire your TAs/Associates into these “Summer” Positions
3. Terminate from AY Positions or put on SWB during Summer months
4. Freeze “Summer” positions during the AY when students are in their “normal” Positions

Job Aid: How To Change Position Status On Vacant Positions
Help for Graduate Student Appointments

- [Graduate Student Employment](#)
- [UCPath for Graduate Student Employment](#)
  - [Graduate Student Employment: Summer Session Pay](#)
Where to Find UCPath Help

UC San Diego Job Aids and Quick References

https://ucpath.ucsd.edu/training/job-aids.html
Submit a Ticket through Service Now

http://support.ucsd.edu

You can submit UCPath questions through Service Now, and a team of our local experts will respond.

1. Go to support.ucsd.edu
2. Select Payroll, Academic Personnel & HR
3. Select Get Help & Order Services
4. In the Categories box on the left side of the page, select Get Help (UCPath)
5. Select Submit a Ticket
6. In the first field, select I want to…Make a Request.
7. Complete the remaining fields with your question. You can also attach screen shots.
   a. Grad Employment: Services & Support Collab page
8. When you are done, select Submit.
<table>
<thead>
<tr>
<th>JUNE</th>
<th>Hire all Session 1 and July Special Session Instructors in UCPath. Download &amp; fill-in spreadsheets for mass uploads.</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/2-6/4</td>
<td>□ Process remaining Graduate Student Positions &amp; Hires in UCPath after approved by Graduate Division Dean.</td>
</tr>
<tr>
<td></td>
<td>□ Download <strong>Mass Upload Spreadsheet for grad students</strong> from collab site. <a href="https://collab.ucsd.edu/x/iS_YBQ">https://collab.ucsd.edu/x/iS_YBQ</a></td>
</tr>
<tr>
<td></td>
<td>□ Process remaining Lecturer &amp; Recall Positions &amp; New Hires/Rehires/Concurrent Hires in UCPath. (DUE must approve Visiting Lecturers before processing in UCPath.)</td>
</tr>
<tr>
<td>6/5-6/10</td>
<td>⭐ DO NOT Initiate or Approve any Unit 18 Lecturer Entries in UCPath</td>
</tr>
<tr>
<td>6/21</td>
<td>□ Download copy of the <strong>Mass Upload Spreadsheet for Faculty and Lecturers - JULY</strong> from your department folder on OneDrive <a href="https://go.ucsd.edu/3cPRUEF">https://go.ucsd.edu/3cPRUEF</a>.</td>
</tr>
<tr>
<td>JULY</td>
<td>Turn in Mass Upload Worksheets &amp; Enter Funding in UCPath for Session 1 &amp; July Special Session classes. Finish hiring Session 2 instructors.</td>
</tr>
<tr>
<td>---------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>7/2</td>
<td>☐ <strong>DEADLINE</strong> - Turn in mass upload spreadsheet for SESSION 1 &amp; July Special Session <strong>grad student payments</strong> at this link: <a href="https://forms.gle/GJrdDSMfuiFpVCKd9">https://forms.gle/GJrdDSMfuiFpVCKd9</a></td>
</tr>
<tr>
<td></td>
<td>☐ <strong>DEADLINE</strong> - Turn in mass upload spreadsheet for SESSION 1 &amp; July Special Session <strong>faculty and lecturer payments</strong> on OneDrive department folder. <a href="https://go.ucsd.edu/3cPRUEF">https://go.ucsd.edu/3cPRUEF</a></td>
</tr>
<tr>
<td>7/3 - 7/19</td>
<td>☐ Enter funding for all Summer Session July pay period payments (faculty, lecturers, and grad students) by 7/19.</td>
</tr>
<tr>
<td></td>
<td>☐ Finish hiring Session 2 instructors.</td>
</tr>
<tr>
<td>7/20</td>
<td>✨ UCPath deadline for the 7/1-7/31 pay period, 3pm</td>
</tr>
<tr>
<td>7/26</td>
<td>Download copy of the <strong>Mass Upload Spreadsheet for Faculty and Lecturers - AUGUST</strong> from your department folder on OneDrive <a href="https://go.ucsd.edu/3cPRUEF">https://go.ucsd.edu/3cPRUEF</a>.</td>
</tr>
<tr>
<td>7/30</td>
<td>Session 1 pay date</td>
</tr>
<tr>
<td>AUG.</td>
<td><strong>Turn in Mass Upload Worksheets &amp; Enter Funding in UCPath for Session 2 &amp; August Special Session classes.</strong></td>
</tr>
<tr>
<td>------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>8/6</td>
<td><strong>DEADLINE</strong> - Turn in mass upload spreadsheet for SESSION 2 &amp; August Special Session grad student payments at this link:  <a href="https://forms.gle/GJrdDSMfuiFpVCKD9">https://forms.gle/GJrdDSMfuiFpVCKD9</a></td>
</tr>
<tr>
<td></td>
<td><strong>DEADLINE</strong> - Turn in mass upload spreadsheet for SESSION 2 &amp; August Special Session faculty and lecturer payments on OneDrive department folder. <a href="https://go.ucsd.edu/3cPRUEF">https://go.ucsd.edu/3cPRUEF</a></td>
</tr>
<tr>
<td>8/6 - 8/19</td>
<td>Enter funding for all Summer Session August pay period payments (faculty, lecturers, and grad students) by 8/19</td>
</tr>
<tr>
<td>8/20</td>
<td><strong>UCPath deadline for 8/1-8/31 pay period, 3pm</strong></td>
</tr>
<tr>
<td>8/23</td>
<td>Download copy of the <strong>Mass Upload Spreadsheet for Faculty and Lecturers - SEPTEMBER</strong> from your department folder on OneDrive <a href="https://go.ucsd.edu/3cPRUEF">https://go.ucsd.edu/3cPRUEF</a>.</td>
</tr>
<tr>
<td>9/1</td>
<td>Session 2 pay date</td>
</tr>
</tbody>
</table>
# Academic Unit To-Do Checklist

<table>
<thead>
<tr>
<th>SEPT.</th>
<th>Turn in Mass Upload Worksheets &amp; Enter Funding in UCPath for Remaining Summer Session payments (as needed).</th>
</tr>
</thead>
</table>
| 9/3   | ☐ **DEADLINE** - Turn in mass upload spreadsheet for remaining grad student Summer Session payments at this link: [https://forms.gle/GJrdDSMfuiFpVCKd9](https://forms.gle/GJrdDSMfuiFpVCKd9)  
☐ **DEADLINE** - Turn in mass upload spreadsheet for remaining Summer Session faculty and lecturer payments on OneDrive department folder. [https://go.ucsd.edu/3cPRUEF](https://go.ucsd.edu/3cPRUEF) |
<p>| 9/3-9/19 | ☐ Enter funding for all remaining Summer Session payments (faculty, lecturers, and grad students) by 9/19. |
| 9/20  | ★ UCPath deadline for 9/1-9/30 pay period, 3pm |
| 10/1  | Pay Date |</p>
<table>
<thead>
<tr>
<th>Questions?</th>
</tr>
</thead>
<tbody>
<tr>
<td>We are happy to help!</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summer Session</th>
<th>Academic Personnel</th>
<th>Graduate Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisa Bargabus</td>
<td>Kelly Maheu</td>
<td>Courtney Aguila</td>
</tr>
<tr>
<td>summer-payroll@ucsd</td>
<td><a href="mailto:kmaheu@ucsd.edu">kmaheu@ucsd.edu</a></td>
<td><a href="mailto:claguila@ucsd.edu">claguila@ucsd.edu</a></td>
</tr>
<tr>
<td></td>
<td>Healther Zion</td>
<td>Kacy Cashatt</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:hzion@ucsd.edu">hzion@ucsd.edu</a></td>
<td><a href="mailto:lajimenez@ucsd.edu">lajimenez@ucsd.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Laura Jimenez</td>
</tr>
</tbody>
</table>