

# Payroll Training Summer 2019

May 15, 2019



UC San Diego

# AGENDA

- **Welcome!**
- **What** you need to do for Summer Session payroll
- **When** you need to do it
- **How** to enter PPS information
  - Instructors of Record  
Mary Baran, Academic Personnel, x 23748
  - Graduate Students: Associates-In & Instructional Support  
Courtney Aguila, Graduate Division, x 43727

Summer  
Session is still  
in SERF



We are here.

# Summer Session Contacts

**Lisa Bargabus**

Faculty hiring & payroll  
x 25064

**Kara Burke**

Marketing/PR  
x 45309

**Matt Sapien**

Course Scheduling  
x 44744

## Summer Session 2019

**Session 1**            7/1/19 – 8/3/19

**Session 2**            8/5/19 – 9/7/19

## Special Sessions

3 Weeks	8 Weeks	10 Weeks
7/1/19 – 7/20/19 7/22/19 – 8/10/19 8/12/19 – 8/31/19	7/1/19 – 8/24/19	7/1/19 – 9/7/19

Students started enrolling in courses 4/15/19

23,194 Enrollments as of 5/13/19

# Summer Session

## Annual Workflow

**2,552 Students  
on Waitlists!**

October	November	December	January	February	March
Call for Course Proposals	Course Proposals Due	Advisory Committee Meeting	Preview of Classes posted  Approved Courses scheduled within ISA  Schedule Build Spreadsheets sent to Registrar	Classrooms Assigned  Faculty teaching Appointment Letters Sent out  Approved Courses set up in ISIS	Schedule of Classes Available on TritonLink beginning March 21
April	May (in progress)	June	July	August	September
Students Begin Enrollment	Enrollment Management of Waitlists  Student Fees Assessed	Student Fees Due  Students: Add/Drop Courses	Session 1 Classes Begin  Students: Add/Drop Courses	Session 2 Classes Begin  Student Fees Due  Faculty Pay Date (Session 1)	Sessions End  Reporting Begins  Faculty Pay Date (Session 2)

# What's New for 2019?

Hot off the Press - NEW 2019 Incentive Program from Academic Affairs to support students' time to degree.

Increased funding to departments offering more Summer Session courses AND achieving more student enrollments than Summer Session 2018.

- \$1,000 per course  
and
- \$25/student (Arts & Humanities, Social Sciences)
- \$50/student (Biological Sciences, Physical Sciences, Engineering)

More details coming soon.

# Kara Burke

Marketing  
PR  
Engagement  
Events

New to  
Summer  
Session

## Overview - New Vision & New Life for Summer Session

Goal: Grow Summer Session

Help your department build on your established successes!

### Student Outreach

- Email, newsletters, social media
- Link to Summer Session website on your Division/Department websites

### Creative Ways for Students to Engage & Unplug from studying

- New activities & events during Summer Session

Push to grow outwardly to visiting students, but focus is still on our current UCSD students.

# Kara Burke

Marketing  
PR  
Engagement  
Events

New to  
Summer  
Session

I look forward to working with you & your department!

Who should I contact to carry out this vision?

Please email or call me with any questions, concerns, or ideas.

[klburke@ucsd.edu](mailto:klburke@ucsd.edu)

858-534-5309



# What's New for 2019?

- No course salary cap!
  - All instructors paid 8.5% annual salary (4+ unit course)
  - Impact: Any instructor teaching 4 courses will be at 34% annual salary - 1% reduction is required.
- Interfolio pilot for Summer Session appointment files.
  - Optional - Some departments still using SharePoint for appointment files.
  - Payroll worksheets and appointment letters will continue to be uploaded to SharePoint.
- Campus is moving from Blackboard to Canvas
  - Summer Session visiting lecturers will use Canvas
  - <http://edtech.ucsd.edu>

# What's New for 2019?

## Summer Success Programs

Credit-bearing courses in the following programs:

- Academy in the Arts & Humanities
- Summer Bridge
- Summer Engineering Institute
- Triton Freshman Scholars (5 & 8 Week courses)
- Triton Sophomore Scholars

Faculty Director payments – Anytime between July-Sept.

Instructor Success Bonuses (\$500 per week) will be paid with a different index. See details on payroll worksheets.

## Friendly Reminders

Summer Graduate Teaching Scholars (SGTS) – Faculty mentor \$500 payments will NOT go through payroll. Please email a research fund index number to Denise Christensen at [dechristensen@ucsd.edu](mailto:dechristensen@ucsd.edu).

Visiting instructors will need FERPA training. (Valid for 3 years.)

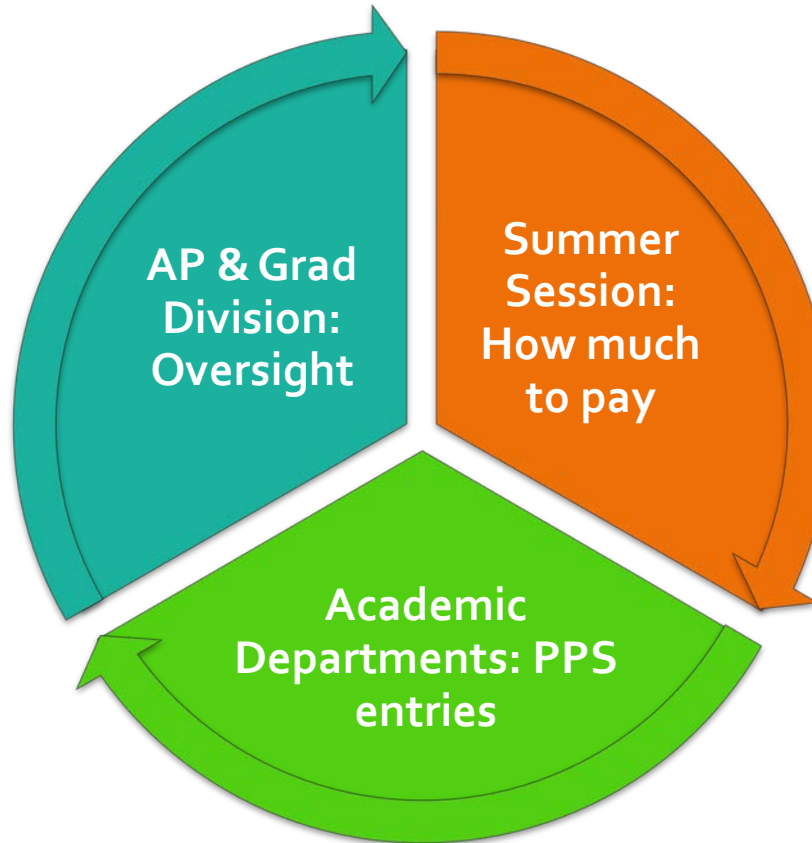
# Instructor Names on the Schedule of Classes

- Summer Session cannot add an instructor to the Schedule of Classes unless they have an active teaching appointment in PPS (and ISIS).
- Instructors cannot access campus systems if their name is not on the Schedule of Classes.
- Students are now using EASy (Enrollment Authorization System) to request prerequisite approvals from professors. The request cannot be automatically processed when the instructor name is “STAFF”.

Summer  
Session Payroll

Instructors of  
Record

## Summer Session Payroll Requires Teamwork!



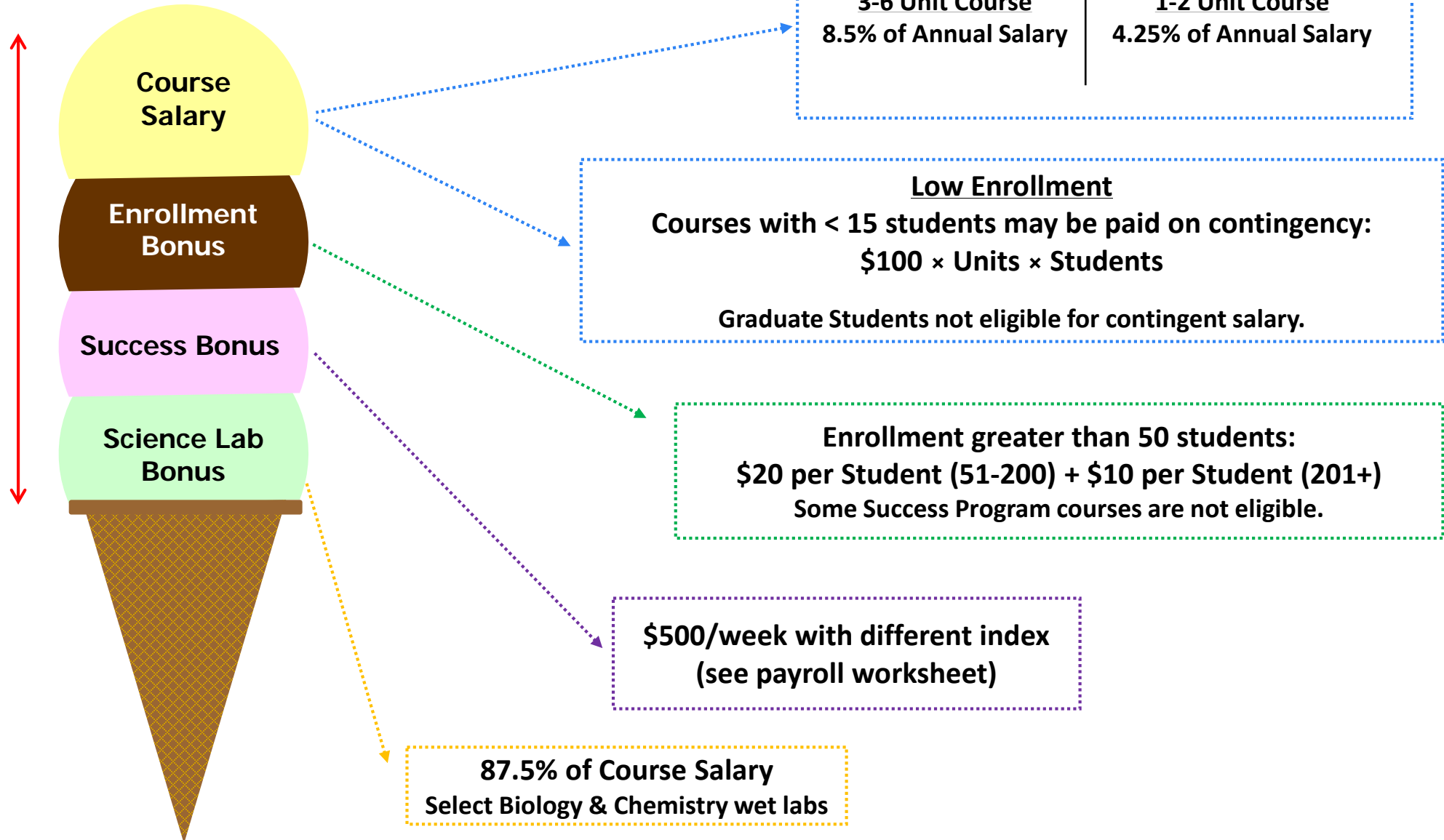
# Summer Compensation for Instructors is Complicated!

## MAXIMUM ALLOWED

33% (or 3/9) of  
UC AY Annual Salary  
(1/9 for 3 summer mos. = 3/9)  
[See APM-661](#)

43% limit for Recall  
Faculty  
[See APM-205](#)

**Note**  
Instructors who teach **4 courses** in Summer Session will **exceed** the 33% of UC salary maximum. **Session 2 course salaries will be reduced as needed.**



Don't Worry!

- Summer Session will do all the math for you!
- We'll upload payroll worksheets to your department folder on SharePoint with all the info.
- If you need SharePoint access, email Lisa Bargabus at **[summer-payroll@ucsd.edu](mailto:summer-payroll@ucsd.edu)**.



# SAMPLE PAYROLL WORKSHEET

Date: 7/23/19  
 Department: Psychology  
 Summer Session Payroll Index # MYINDEX  
 Fund: 99100A  
 Sub: 0

Questions? Contact Lisa Bargabus at x25064 or summer-payroll@ucsd.edu  
 7/15/19 - Final Session 1 worksheet with enrollment bonuses.  
 7/22/19 - Added 1st snapshot for Session 2. Bonuses will be added after 8/12/19 snapshot.

		FINAL PAYROLL WORKSHEET FOR SESSION 1																
Paydate: 08/01/19					Appointment Line								Distribution Lines				Appt Ann/Hr Rate	
Name		Faculty Type	Title Code	DOS Code	Appt Begins	Appt Ends	Session	CourseID	Units	1st Snapshot 6/5/19	2nd Snapshot 7/8/19	%Full	Paydate Begins	Paydate Ends	Course Salary	Enr Bonus	Total Salary	Annual Salary
Weasley	Rose	GradStdnt	1506	SST	07/01/19	08/03/19	1	PSYC106	4	69	66	0.50	07/01/19	07/31/19	\$4,492	\$320	\$4,812	\$52,842
Lovegood	Luna	LRF	1203	SSC	06/15/19	09/22/19	1	PSYC104	4	67	60	0.50	07/01/19	07/31/19	\$10,795	\$200	\$10,995	\$127,000
Chang	Cho	LNSF	1550	SST	06/15/19	09/22/19	1	PSYC70	4	11	10	0.50	07/01/19	07/31/19	\$4,400	\$0	\$4,400	\$54,738
Longbottom	Neville	LRF	1103	SSC	06/15/19	09/22/19	1	PSYC6	4	24	17	0.50	07/01/19	07/31/19	\$11,645	\$0	\$11,645	\$137,000

7/16/19 - Chang - Paid on contingency: \$400 \* 11 = \$4,400

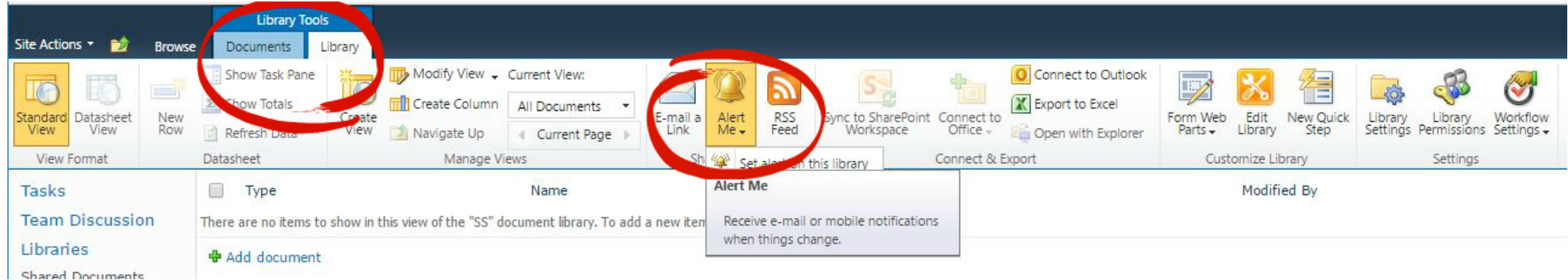
PRELIMINARY PAYROLL WORKSHEET FOR SESSION 2																		
Paydate: 08/30/19					Appointment Line								Distribution Lines				Appt Ann/Hr Rate	
Name		Faculty Type	Title Code	DOS Code	Appt Begins	Appt Ends	Session	CourseID	Units	1st Snapshot 7/10/19	2nd Snapshot 8/12/19	%Full	Paydate Begins	Paydate Ends	Course Salary	Enr Bonus	Total Salary	Annual Salary
Bones	Susan	LRF	1103	SSC	06/15/19	09/22/19	2	PSYC102	4	69		0.50	08/01/19	08/31/19	\$10,003	\$0	\$10,003	\$122,500
Bones	Susan	LRF	1103	SSC	06/15/19	09/22/19	2	PSYC105	4	68		0.50	08/01/19	08/31/19	\$10,004	\$0	\$10,004	\$122,500
Krum	Victor	VistLect	1550	SST	06/15/19	09/22/19	2	PSYC181	4	13		0.50	08/01/19	08/31/19	\$5,200		\$5,200	\$66,691
Potter	Albus	GradStdnt	1506	SST	08/01/18	09/07/19	2	PSYC7	4	14		0.50	08/01/19	08/31/19	\$4,492		\$4,492	\$52,842

7/23/19 - Susan Bones is teaching 4 courses. Her Session 2 course salaries are reduced to stay under \$40,833 (33% annual salary max). \$40,833 - \$20,826 from Session 1 = \$20,007 or \$10,003 & \$10,004 for Session 2 courses.

7/23/19 - Krum paid on contingency: 13 \* \$400 = \$5,200.



You can get email alerts when a payroll worksheet is uploaded to SharePoint.



1. Log into SharePoint (with your email username & password)  
<https://evc-share-campus.ucsd.edu/resourceadmin/summer/faculty-files/>
2. From your department folder, select **Library Tools – Library**
3. Select **Alert Me – Set alarm on this library**

You can set one or more people to receive email when a payroll worksheet is uploaded!

SS - New Alert

OK Cancel

**Alert Title**  
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Summer Session Payroll Worksheet

**Send Alerts To**  
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:  
you@ucsd.edu; lbargabus@ucsd.edu

**Delivery Method**  
Specify how you want the alerts delivered.

Send me alerts by:  
☒ E-mail lbargabus@ucsd.edu  
☐ Text Message (SMS)  
☐ Send URL in text message (SMS)

**Change Type**  
Specify the type of changes that you want to be alerted to.

Only send me alerts when:  
☒ All changes  
☐ New items are added  
☐ Existing items are modified  
☐ Items are deleted

**Send Alerts for These Changes**  
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:  
☒ Anything changes  
☐ Someone else changes a document  
☐ Someone else changes a document created by me  
☐ Someone else changes a document last modified by me

**When to Send Alerts**  
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

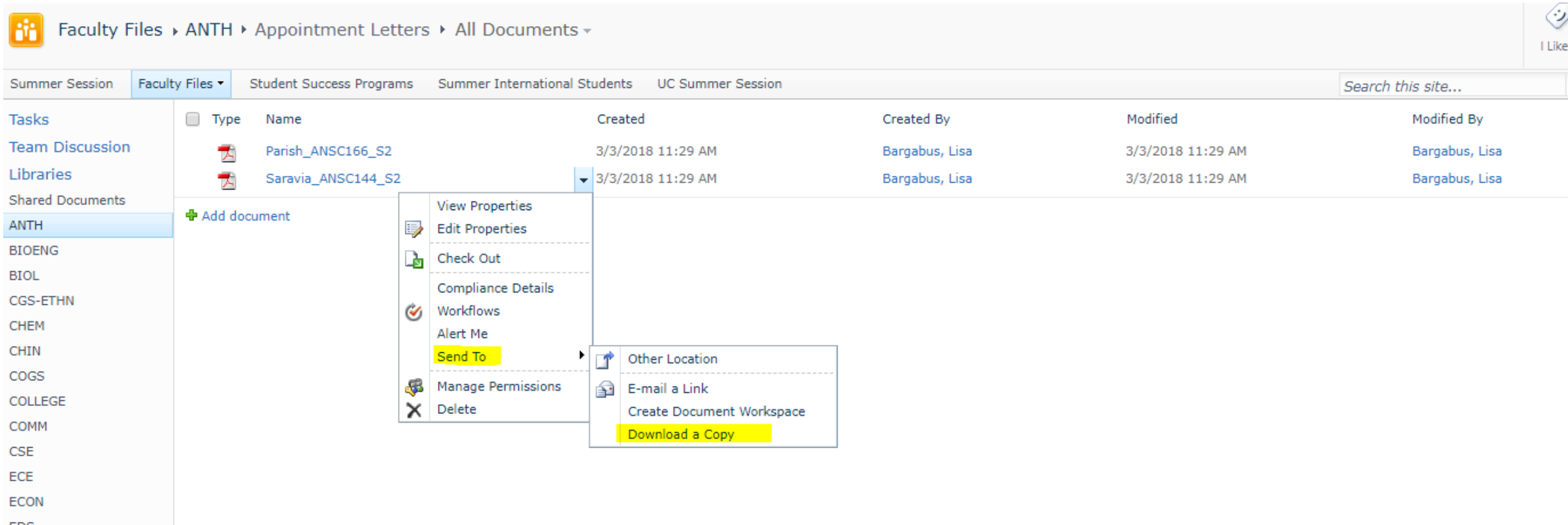
☒ Send notification immediately  
☐ Send a daily summary  
☐ Send a weekly summary

Time:  
Monday 1:00 PM

OK Cancel

Recommendation:  
"New items are added"



# SharePoint Tip – Hover your mouse on a file name to download a copy.



Faculty Files ▸ ANTH ▸ Appointment Letters ▸ All Documents ▾

Summer Session Faculty Files ▾ Student Success Programs Summer International Students UC Summer Session

Search this site...

Type	Name	Created	Created By	Modified	Modified By
	Parish_ANSC166_S2	3/3/2018 11:29 AM	Bargabus, Lisa	3/3/2018 11:29 AM	Bargabus, Lisa
	Saravia_ANSC144_S2	3/3/2018 11:29 AM	Bargabus, Lisa	3/3/2018 11:29 AM	Bargabus, Lisa

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- Workflows
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  - Other Location
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  - Create Document Workspace
  - Download a Copy
- Manage Permissions
- Delete

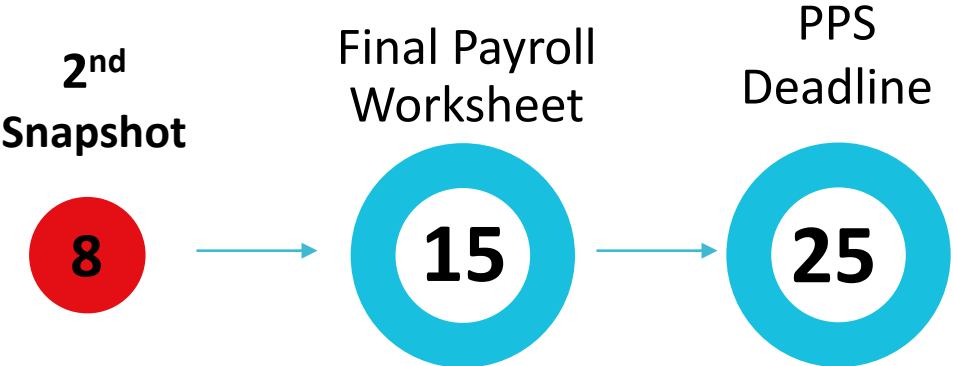
# Timeline for Session 1 & July Special Session Payroll Worksheets

JUNE



Course Salaries  
(contingent if <15 students)

JULY



Final Course Salaries  
Enrollment Bonuses

8/1/19  
PAY DATE

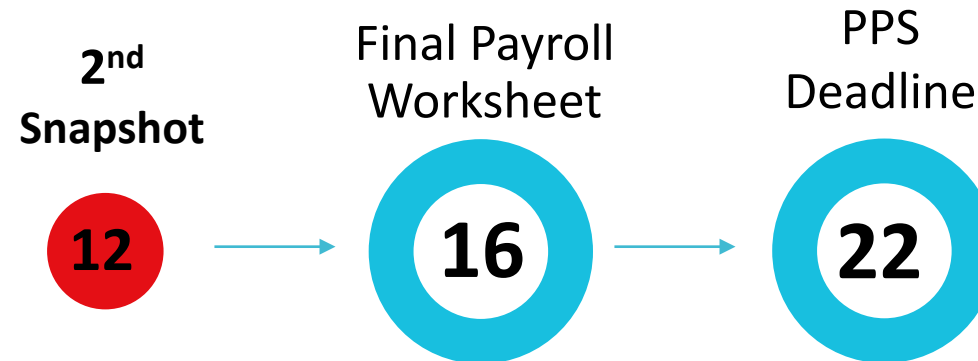
# Timeline for Session 2 & August Special Session Payroll Worksheets

**JULY**



Course Salaries  
(contingent if <15 students)

**AUGUST**



Final Course Salaries  
Enrollment Bonuses

**8/30/19  
PAY DATE**

# Useful Stuff you need to know for PPS

- 1 Summer Session Course - 50% appointment
- 2 Summer Session Courses - 100% appointment

## Maximum

- 2 courses per Session
- 4 courses total during Summer Session

Useful Stuff  
you need to  
know for PPS

## DOS Codes

SSC	SST
Hint: SECURE	Hint: TEMPORARY
UC Ladder Rank Faculty Professor LSOE LPSOE Adjunct Professor	Everyone Else Recall Visiting Prof Lecturer Associate-In

Useful Stuff  
you need to  
know for PPS

## Sub Categories

Sub 0	Sub 2
All Instructors of Record Teaching Assistant (TA) No timekeeping Flat rate paid	Reader and Tutor Timekeeping required Hourly reported in TAR



```

PPEARC0-E1595          SD EDB Entry/Update
07/23/19  21:25:10      Appts./Distributions-Condense      Userid:  SDAPORWY
ID: 000110000      Name: SMITH, SUMMER      Emp Stat:  A      Pri Pay: MO
      PAF Gen No:  120      Stu/Reg:  _      Page  1 of  4
Appt      Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End Dur  Dept      FLSA
  20      _____ A  5  _  _      061519      092219      000207
Title                                           Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
1550  LECT IN SUMMER SESSION      _  .50      E  4653.00      B MO  N  N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg PayEnd Step OA  Rate/Amt  DOS PRQ D W
21  THEXXX 99100A 0  _  _      070119  073119  _  _      4653.00  SST  _  _  _
_____
_____
_____
_____
Next Func:  _____ ID:  _____ Name:  _____ SSN:  _____

```

Lecturer NSF, 50%, 1<sup>st</sup> Session  
Course Dates: 7/1/19-8/3/19  
Course Payment: \$4,653  
Sue x41122



```

PPEAPCB-E1595          SD EDB Entry/Update
07/17/19  22:19:18      Appts./Distributions-Condense      Userid:  SDAPORWY
ID: 000110000  Name: WILSON, JACK      Emp Stat:  A      Pri Pay: M0
      PAF Gen No: 128      Stu/Reg:  _      Page 1 of 4
Appt  Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End  Dur  Dept  FLSA
 30      _      A   5   _      061519      092219      000207
Title                                     Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
1103  PROF-AY-1/9      _   .50   F   10099.00      B  M0   N   N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg  PayEnd  Step  OA  Rate/Amt  DOS  PRQ  D  W

31  THEXXXX  99100A 0      _      _  070119  073119      _  _  9699.00  SSC  _  _  _
32  THEXXXX  99100A 0      _      _  070119  073119      _  _  400.00  SSC  _  _  _

Next Func:  ID:  Name:  SSN:

```

PROF-AY, 50%, 1<sup>st</sup> Session

Course Dates: 7/1/19 – 8/3/19

Course Payment: \$9,699, Enrollment Bonus \$400

Sue x41122


 PAN  
Comments



```

PPEAPCB-E1595          SD EDB Entry/Update
08/20/19   22:19:18      Appts./Distributions-Condense      Userid: SDAPORWY
ID: 100333333   Name: SESSIONS, MARK      Emp Stat: A      Pri Pay: M0
      PAF Gen No: 120      Stu/Reg:             Page 1 of 4
Appt   Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End Dur  Dept  FLSA
 50              A   5                      061519    092219    002231
Title                                     Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
1608    LECT SOE-AY-1/9                1.00  F   15740.00    B M0  N  N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg PayEnd Step OA  Rate/Amt  DOS  PRQ  D W
51  PPP1754  99100A  0                    080119 083119                   7870.00  SSC               
52  PPP1754  99100A  0                    080119 083119                   7870.00  SSC               

Next Func:        ID:        Name:        SSN:       

```

Lecturer SOE, 100%, 2<sup>nd</sup> Session

Course Dates: 8/5/19 – 9/7/19

Two Course Payments: \$7870, \$7870

Total Payment: \$15,740


 PAN  
Comments

# Summer Session Payroll

# Graduate Student Employment

## General Reminders

- Only approved AI appointments flagged by Matt should be entered into PPS. All other summer graduate student payroll entries are to be entered after mid-May.
- Obtain home department approval.
- Check eligibility (academic and financial).
- Check work permit end date (F1: see I-20; J1: see DS-2019).
- Add new appointment line in PPS when changing Title Code, step, rate, or percentage.

# Summer Session Payroll

# Graduate Student Employment

## General Reminders

- Add WOS appts for students still engaged in research when appropriate.
- Add College Code as 00 for graduate students to avoid incorrect DCP deductions.
- College Code stays blank for undergraduate students and Nonstudent Tutors.
- Add “E” for Employee Relations Code on EPER to ensure correct employee unit and representation codes.

```

PPEARPC0-E1595          SD EDB Entry/Update
 7/23/19   22:23:15      Appts./Distributions-Condense      Userid: SDAPORWY
ID: 012345678   Name: TRITON,LUKE      Emp Stat:  A      Pri Pay: M0
      PAF Gen No: 128      Stu/Reg:  _      Page 1 of 4
Appt   Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End  Dur  Dept  FLSA
 10    _____ A   5      070119   080319   000987
Title                                     Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
1506 ASSOC IN_-AY-1/9-GSHIP          _   .50   F   4492.00   B M0  N  N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg PayEnd Step 0A  Rate/Amt  DOS  PRQ  D W
 11  MYFUND  99100A  0  _____ 070119 073119 _____ 4492.00 SST  _  _  _
_____
_____
_____
Next Func:  _____ ID:  _____ Name:  _____ SSN:  _____

```

Associate-In, 50%, 1<sup>st</sup> Session  
 Course Dates: 7/1/19 - 8/3/19  
 Course Payment: \$4,492 Sue x41122



PPEAPC0-E1595 SD EDB Entry/Update 05/15/19 15:39:31  
 05/15/19 19:35:50 Appts./Distributions-Condense Userid:  
 ID: Name: Emp Stat: A Pri Pay: MO  
 PAF Gen No: 9 Stu/Reg: Y Page 3 of 3  
 Appt Actions Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept FLSA  
40 A 5 070119 080319 00203  
 Title Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv  
2310 TEACHG ASST-GSHIP 0.50 F 3223.00 B MO N N

Dist No

Actions	Index	Fund	Sub	FTE	Dis %	PayBeg	PayEnd	Step	OA	Rate/Amt	DOS	PRQ	D	W
41														

		<u>MYFUND</u>	<u>99100A</u>	<u>0</u>		<u>070119</u>	<u>073119</u>			<u>3223.00</u>	<u>SST</u>			
--	--	---------------	---------------	----------	--	---------------	---------------	--	--	----------------	------------	--	--	--

Next Func:		ID:		Name:		SSN:	
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U0001 Input accepted

==&gt;

F: 1-Help	2-Cancel	4-Print	5-Update
F: 7-Backward	9-Jump		

Teaching Assistant, 50%, Sub 0, 1<sup>st</sup> Session  
 Course Dates: 7/1/19 - 8/3/19  
 Course Payment: \$3,223 Sue x41122

PAN  
Comments



**Title Code 2860 – Graduate Tutor • 2<sup>nd</sup> Session (8/5/19 - 9/7/19) - Pay date 8/30/19**

Readers and Tutors are **Sub 2** and are required to submit a timesheet. Calculate the hours worked, multiply by the hourly rate, and enter the total under the Rate column in TAR. **Readers and Tutors must be set up monthly if they have a concurrent monthly appointment.**

```

PPEAPC0-E1595          SD EDB Entry/Update          05/04/19 15:39:31
05/04/19 19:35:50      Appts./Distributions-Condense  Userid:
ID:          Name:          Emp Stat: A          Pri Pay: MO
          PAF Gen No: 9          Stu/Reg: Y          Page 3 of 3
Appt  Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End Dur  Dept  FLSA
 40          A    5    _    _    080119    090719    _    00203
Title                                     Grade %Full F/V Ann/Hr Rate  Rt Sch  Time Lv
2860 TUT-GSHIP                        _    0.25  V  1204.00    B BW  A  N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg PayEnd Step OA  Rate/Amt  DOS  PRQ D W
41
      MYFUND 99100A 2    _    _    080119 083119    _    _    1204.00    SST    _    _    _
_____
_____
Next Func:  ID:  Name:  SSN:
U0001 Input accepted
==>
F: 1-Help 2-Cancel          4-Print 5-Update
F: 7-Backward          9-Jump

```

**Tutor, Graduate, 25%, Sub 2, 2<sup>nd</sup> Session**  
**Course Dates: 8/5/19 - 9/7/19**  
**Course Payment: \$1,204 Sue x41122**

## PAN Comments



**Title Code 2850 – Graduate Reader • 2<sup>nd</sup> Session (8/5/19 - 9/7/19) - Pay date 8/30/19**

Readers and Tutors are **Sub 2** and are required to submit a timesheet. Calculate the hours worked, multiply by the hourly rate, and enter the total under the Rate column in TAR. **Readers and Tutors must be set up monthly if they have a concurrent monthly appointment.**

PPEAPC0-E1595

SD EDB Entry/Update

05/04/19 19:35:50

Appts./Distributions-Condense

05/04/19 15:39:31

ID:

Name:

Emp Stat: A

Pri Pay: MO

PAF Gen No: 9

Stu/Reg: Y

Page 3 of 3

Appt 40

Actions Pgm

Typ Bas Pd Ovr

Appt Begin 080119

Appt End 090719

Dur

Dept 00203

Title

Grade %Full F/V Ann/Hr Rate

Rt Sch Time Lv

2850

READER-GSHIP

0.25

V

813.00

B

MO

A

N

Dist No

Actions Index Fund Sub FTE Dis % PayBeg PayEnd Step OA Rate/Amt DOS PRQ D W

41

MYFUND 99100A 2

080119 083119

813.00

SST

Next Func: U0001

ID:

Name:

SSN:

Input accepted

===>

F: 1-Help

2-Cancel

4-Print

5-Update

F: 7-Backward

9-Jump

Or BW for  
Bi-Weekly

Reader, Graduate, 25%, Sub 2, 2<sup>nd</sup> Session  
Course Dates: 8/5/19 - 9/7/19  
Course Payment: \$813 Sue x41122

PAN  
Comments

# Summer Session Contacts

**Lisa Bargabus**

x 25064

[summer-payroll@ucsd.edu](mailto:summer-payroll@ucsd.edu)

**Kara Burke**

x 45309

[klburke@ucsd.edu](mailto:klburke@ucsd.edu)

**Matt Sapien**

x 44744

[summer-scheduling@ucsd.edu](mailto:summer-scheduling@ucsd.edu)

# Questions?

We are happy to help!



UC San Diego