# Summer Session 2021

<table>
<thead>
<tr>
<th>Ladder Rank Faculty</th>
<th>Lecturers who taught in 2020-2021 AY</th>
</tr>
</thead>
<tbody>
<tr>
<td>LSOE, LPSOE</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lecturers who did not teach in 2020-2021 AY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recalls</td>
</tr>
<tr>
<td>Graduate Students</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FY Staff, Researchers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty from other UC Campuses</td>
</tr>
</tbody>
</table>

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12/10/20 | INSTRUCTOR APPOINTMENT HANDBOOK

summer-payroll@ucsd.edu
summersession.ucsd.edu
# TABLE OF CONTENTS

**WELCOME TO SUMMER SESSION 2021** ................................................................................................................. 2

**SUMMER SESSION ANNUAL WORKFLOW** ............................................................................................................. 3

**WHAT'S NEW FOR SUMMER 2021** ......................................................................................................................... 4

**HOW INSTRUCTOR COMPENSATION WORKS** ....................................................................................................... 5

**INSTRUCTOR ELIGIBILITY** ....................................................................................................................................... 7

**SPECIAL COMPENSATION FOR SUMMER PROGRAMS** .......................................................................................... 9

**SUMMER SESSION – INSTRUCTIONAL SUPPORT & DEPARTMENT FUNDING** ...................................................... 10

**HOW TO HIRE INSTRUCTORS** .............................................................................................................................. 11

**HIRING PROCESS WORKFLOWS – BY FACULTY TYPE** .......................................................................................... 12

**HIRING TASKS – SUMMARY BY FACULTY TYPE** ............................................................................................... 17

**2021 HIRING DEADLINES FOR ACADEMIC UNITS** ............................................................................................... 18

**HOW TO SUBMIT APPOINTMENT FILES** ............................................................................................................ 18

**SUMMER SESSION SENDS APPOINTMENT LETTERS** ............................................................................................ 21

**HOW TO ENTER POSITIONS & HIRES IN UCPATH** ............................................................................................... 22

**APPENDICES** ........................................................................................................................................................ 23

- **APPENDIX A. INTERFOLIO JOB AID** .................................................................................................................... 24
- **APPENDIX B. SAMPLE APPOINTMENT FILE DOCUMENTS** ................................................................................ 27
- **APPENDIX C. APPOINTMENT LETTER PROCESS** ................................................................................................. 37
- **APPENDIX D. TEACHING + LEARNING COMMONS SERVICES** ............................................................................. 40
- **APPENDIX E. EXCERPTS FROM ACADEMIC PERSONNEL MANUAL** ................................................................. 40
Welcome to Summer Session 2021

The Faculty Appointment Process is Different for Summer Session

Summer procedures for hiring and approving faculty to teach differ slightly from the academic year. Faculty are hired as “by agreement”. Open recruitment is not required for Summer Session appointments. An appointment letter is generated by Summer Session or the IA System after appointments are approved and confirmed to align with campus policy. To verify that an instructor is eligible to teach, please refer to the UCOP Academic Personnel Manual and the UC San Diego Policy & Procedure Manual (APM-600, APM-661, APM-662, APM-205, and PPM 230-243.)

Faculty Appointment Goal: To hire as many instructors as possible by April.

Historical data shows that students are hesitant to enroll in Summer Session if they don’t know who is teaching a course. Summer Session wants to avoid cancelling courses due to low enrollment, so getting instructors assigned to the Schedule of Classes as soon as possible is important. Summer Session cannot add a visiting lecturer to the Schedule of Classes until they accept their Appointment Letter and their appointment is active in PPS. We need your help to make that happen.

Using this Handbook

The information provided in this handbook includes sample appointment documentation, as well as guidelines and procedures outlined in the 2021 Summer Session Guidebook. Both this handbook and the 2021 Summer Session Guidebook can be found at the Summer Session website under the tab “Staff and Faculty Resources” at summersession.ucsd.edu.

Thank YOU for Making Summer Session a Success!

The success of Summer Session depends on academic departments, colleges and programs hiring a balanced combination of UC San Diego faculty, Associates-In, and visiting instructors. We appreciate your spirit of teamwork to make Summer Session 2021 a success.
# SUMMER SESSION ANNUAL WORKFLOW

<table>
<thead>
<tr>
<th>OCTOBER</th>
<th>NOVEMBER</th>
<th>DECEMBER</th>
<th>JANUARY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit &amp; Reconciliation</td>
<td>Call for Course Proposals Course Proposals Due</td>
<td>Advisory Committee Meeting Courses approved</td>
<td>Preview of Classes posted Approved courses set-up in system Faculty appointment letters begin</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FEBRUARY</th>
<th>MARCH</th>
<th>APRIL</th>
<th>MAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class scheduling, Classrooms assigned</td>
<td>Courses available on TritonLink</td>
<td>Students begin enrollment Goal – Have instructor names on Schedule of Classes.</td>
<td>Enrollment management of waitlists Student Fees assessed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>JUNE</th>
<th>JULY</th>
<th>AUGUST</th>
<th>SEPTEMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student fees due</td>
<td>Students add/drop courses</td>
<td>Session 2 classes begin Fees Due</td>
<td>Sessions end</td>
</tr>
<tr>
<td>Session 1 Classes Begin</td>
<td>Session 1 - Faculty pay date</td>
<td></td>
<td>Session 2 – Faculty pay date Reporting begins</td>
</tr>
</tbody>
</table>
WHAT’S NEW FOR SUMMER 2021

COURSES
• Remote Instruction – Academic Senate approved remote instruction, if required to meet campus safety standards. As we approach summer, scheduling for Pod casting, face-to-face, etc. will be announced.
• Departments will use the Instructional Scheduling Assistant (ISA) to schedule Summer Session 2021 courses, and submit changes to the Schedule of Classes (add new classes, change instructors, and requests to cancel courses).
• Calendar – campus is closed on July 5th for the Independence Day holiday. Please schedule any make-up sessions before courses are posted on the Schedule of Classes.

FACULTY
• Bio/Bibs are no longer required in Summer Session appointment files.
• Faculty compensation model will continue as is from summer 2020:
  1. All instructors are paid 8.5% of annual salary for teaching a 4-Unit course.
  2. Summer Success Programs are approved to offer success bonuses.
  3. Contingent payment for courses with low enrollment (below 15) is $150 per unit × students enrolled.

STUDENTS
• Expand customer service communication tools to support students via Zoom appointments and office hours.
• Collaborate with units to improve on-boarding of summer students to meet standard and innovative changes across the campus.
• Develop direct step by step instructions to simplify Summer Session “how-to” processes.

PROGRAMS
• Summer Success Programs are under review and expect to continue for 2021 with changes.

ADMINISTRATIVE
• EVC Simmons and Academic Affairs will continue to offer the Incentive Pilot Program for academic units that increase their 2021 Summer Session course offerings, and enroll more students than 2018.
  o Eligible academic units will receive $1,000 per course, and $25/$50 per student.
  o Academic units that are not eligible for the 2021 Incentive Pilot will receive the standard Summer Session administrative support funding of $500/course and $13/$33 per student.
• Participate in the new Enterprise System Renewal Student Information System (SIS) workgroup, and other ESR efforts to improve campus systems.
• Summer Session Scoop. Stay up-to-date with deadline reminders and updates by subscribing to The Summer Scoop – a weekly newsletter sent out by the Summer Session office.
  Click here to view past versions of The Summer Scoop on the Summer Session website
  Click here to subscribe
HOW INSTRUCTOR COMPENSATION WORKS

Course Salary
Instructors receive 1 fixed payment per course
1 class  50% appointment
2 classes  100% appointment

Maximum courses allowed:
2 classes maximum per Session
4 classes maximum for the entire Summer Session period.

How Course Salary is Calculated

<table>
<thead>
<tr>
<th>Full Salary (15+ Students Enroll)</th>
<th>Contingent Salary (&lt; 15 Students Enroll)</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.5% annual salary 4 Unit Course</td>
<td>If Instructor agrees (not Grad Students)</td>
</tr>
<tr>
<td>4.25% annual salary 1-2 Unit Course</td>
<td>$150 × Units × Students</td>
</tr>
</tbody>
</table>

Use salary as of 6/30/21
(Summer Session 2021 is the end of 2020-2021 AY.)

Measure Enrollment Twice – Pay the Higher Amount
1st Snapshot - Month before class starts – Give time to recruit more students.
2nd Snapshot - Day after student refund deadline – Campus has that revenue.

2021 Snapshot Dates & Pay Dates

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Snapshot – 6/2/21</td>
<td>1st Snapshot – 7/7/21</td>
</tr>
<tr>
<td>2nd Snapshot – 7/6/21</td>
<td>2nd Snapshot – 8/9/21</td>
</tr>
<tr>
<td>Pay Date: 7/31/21</td>
<td>Pay Date: 9/1/21</td>
</tr>
</tbody>
</table>

Snapshot Dates and Pay Dates vary for Special Session.
EXAMPLE 1. Professor at reduced salary increasing to full salary.

UCSD Professor – 4 Unit course
Annual Salary: $104,000
Summer Session Course Salary: $8,840 (8.5% of $104,000)
Teaching Session 1: June 28th – July 31st
Pay date: 7/30/21

<table>
<thead>
<tr>
<th>1st Snapshot - 6/2/21</th>
<th>2nd Snapshot - 7/6/21</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 students enrolled</td>
<td>15 students enrolled</td>
</tr>
<tr>
<td>Paid on Contingency: $150 × 4 units × 12 = $7,200</td>
<td>Increase to Full Course Salary: $8,840</td>
</tr>
</tbody>
</table>

EXAMPLE 2. Lecturer Teaching 2 Courses in Session 2

Lecturer – Annual Salary: $56,381
Course Salary = 8.5% of $56,381 = $4,792

1 ice cream cone per Session
1 payment of $9,584 will be entered into UCPath for the 8/1/21 – 8/31/21 pay period.
  • Requires coordination when the same instructor teaches for different departments.
  • This will be covered in payroll training in Spring Quarter.
Instructors Can Teach in Both Sessions – Must Follow AP Policy Limitations

MAXIMUM EARNINGS FOR ALL INSTRUCTORS = 3/9ths (33%) Annual Salary for the summer period (July-September)

Includes Summer Session + all other summer salary. APM-600

Ladder Rank Faculty, LSOE, and LPSOE
Cannot exceed 1/9th (~11%) annual salary per month.

Recalls
Recall appointments cannot exceed 43% limit APM-205.

Academic Administrators – If Academic Administrators (ex. Provosts) wish to teach Summer Session, AP reviews case by case. (Typically use vacation time.)

Teaching 4 Courses
All instructors teaching 4 courses require a 1% payment reduction. 4 course salaries = 4 × 8.5% = 34%, which exceeds the 33% annual salary maximum.

Ladder Rank Faculty and Teaching Professors (LSOE, LPSOE) teaching 4 courses must spread payments over 3 months:
1/9th in July
1/9th in August
1/9th in September

Instructor Eligibility

Departments are required to verify eligibility for each proposed instructor. Please review Academic Personnel Manual, APM-661 and APM-662 (See pgs. 12-17).
http://www.ucop.edu/academic-personnel-programs/_files/apm/apm-661.pdf
http://www.ucop.edu/academic-personnel-programs/_files/apm/apm-662.pdf

Annual Salary on June 30, 2021
Even though Summer Session courses are taught July-September, all Summer Session instructors are paid based on their annual salary on June 30, 2021.

Visiting Instructors
Summer Session must pay visiting instructors an annual salary that corresponds to UC San Diego faculty with comparable experience.

Departments recommend an annual salary that aligns with UC San Diego salary scales and is consistent with other department faculty with similar experience and degrees. The pay rates in effect as of June 30, 2021 must be used - NOT July 1, 2021.
Visiting Lecturer (1550): Use the Unit 18 Salary Scale, 7/1/19.
https://www.ucop.edu/academic-personnel-programs/_files/1920/1920-adj-scales/t17.pdf

Visiting Professor: Use the Professor Salary Scales, 10/1/19.
https://www.ucop.edu/academic-personnel-programs/_files/1920/1920-adj-scales/t1.pdf
Additional academic salary scales are located here.

FERPA Training for Instructors
Summer Session faculty with access to student records must comply with the Federal Family Educational Rights and Privacy Act (FERPA) by taking an online FERPA course. This includes visiting Summer Session instructors. The FERPA course is offered via UC Learning Center, takes about 30 minutes to complete, and is valid for 3 years.

More details about the FERPA training requirement are at:
https://blink.ucsd.edu/instructors/advising/confidentiality.html

Fiscal Year Employees Cannot Exceed 100% Appointment
Fiscal year academic and staff employees may teach in Summer Session by exception only. An exception memo must state how the employee’s primary appointment will be adjusted so that the Summer Session course(s) do not cause him/her to exceed 100% appointment.

Two options are:
1. Use vacation days
2. Reduce current fiscal year appointment to 50% during the course dates.

Fiscal year appointees may earn a maximum of 1/12th additional compensation to teach Summer Session. (See APM 600.)

Reducing a fiscal year appointment will impact an employee’s retirement and benefit accruals. Summer Session recommends consulting with HR to understand the consequences of reducing a fiscal year appointment before accepting a Summer Session teaching appointment.

International Instructors
Please consult with the International Faculty & Scholars Office before proposing an International instructor. International visiting instructors must hold appropriate visa status to be eligible for payment. All offers of appointment are contingent upon documentation of employment eligibility in compliance with the Immigration Reform and Control Act of 1986. An instructor cannot teach on a tourist visa. Please note that late visa applications sometimes result in the instructor not being able to teach in Summer Session.

Note: Visiting instructors are encouraged to initiate their visa applications well in
advance of the start of Summer Session, preferably as soon as their course has been approved. Please contact the UCSD Scholar’s Office at 858-246-1448 for more information.

Postdocs or Project Scientists who are hired on H-1B, TN, or E-3 visas are not eligible to teach Summer Session courses. These types of visas are job-specific, which teaching a Summer Session course would require amending the terms of the visa at significant cost to UC San Diego. Please consult with the International Faculty & Scholars Office before submitting an appointment file for an international postdoc or project scientist.

Special Compensation for Summer Programs

Summer Success Programs – Success Bonus
Campus leadership is meeting to plan Summer Success Programs for 2021. Details to follow.

Summer Graduate Teaching Scholars (SGTS)
The Summer Graduate Teaching Scholars (SGTS) is an Academic Affairs program that provides graduate students with faculty-mentored teaching experience and professional development training through the Teaching + Learning Commons. Departments nominate graduate students in November to teach the following summer. An interdisciplinary selection committee reviews the nominations and award recipients are announced at the end of fall quarter.

Graduate students selected for the SGTS program are awarded extra compensation for their participation in mentor sessions with a faculty mentor, the Center for Engaged Teaching, and former SGTS scholars. SGTS faculty mentors also receive a $500 stipend to their research fund. The total payments to program participants are:

<table>
<thead>
<tr>
<th>SGTS Graduate Students</th>
<th>Faculty Mentor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Regular Summer Session course salary through Department payroll</td>
<td>$500 transferred to a research fund – NOT paid as payroll.</td>
</tr>
<tr>
<td>2. $1,200 award, processed through Graduate Division</td>
<td></td>
</tr>
</tbody>
</table>
Summer Session – Instructional Support & Department Funding

Instructional Support - Teaching Assistant (TA) Allocation
Departments will continue to receive block funding for TA/Reader/Tutor instructional support. Please see the Summer Session Guidebook for details regarding the TA Allocation formula.

Department Funding – 2021 Incentive Pilot Program
The Incentive Pilot Program is continuing for Summer Session 2021. The Incentive Pilot Program was created to incentivize academic units to offer more Summer Session courses and achieve higher student enrollments. The overall goal is to help more students use Summer Session to improve their time-to-degree. See the Summer Session Guidebook for details.
# How to Hire Instructors

## Process & Workload Varies by Faculty Type

<table>
<thead>
<tr>
<th>Instructor Group</th>
<th>Faculty Types</th>
<th>Department Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Walk in the Park</strong></td>
<td>Ladder Rank Faculty LSOE/LPSOE</td>
<td>Enter Additional Pay</td>
</tr>
<tr>
<td><strong>Fun Run</strong></td>
<td>Lecturers who taught least one Quarter in 2020-2021 AY</td>
<td>Process Position/Hire Enter Additional Pay</td>
</tr>
<tr>
<td></td>
<td><strong>Rehire</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>-OR-</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Concurrent Hire</strong> - If also have an AY appointment starting 7/1/21 (paid on 09/12 basis)</td>
<td></td>
</tr>
<tr>
<td><strong>10 K</strong></td>
<td>Lecturers who did not teach in 2020-2021 AY</td>
<td>Submit Appointment File Process Position/Hire Enter Additional Pay</td>
</tr>
<tr>
<td></td>
<td><strong>New Hire or Rehire</strong> – If only teaching for Summer.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-OR-</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Concurrent Hire</strong> – If starting an AY appointment on 7/1/21 (paid on 09/12 basis) -</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recalls - <strong>Concurrent Hire</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>Note: For Graduate Students, see Graduate Division presentation for hiring process via the IA System.</em></td>
<td></td>
</tr>
<tr>
<td><strong>Triathlon</strong></td>
<td>FY Appointments (Staff, Researchers, Postdocs) – <strong>Concurrent Hire</strong></td>
<td>Submit Appointment File Process Position/Hire Enter Additional Pay Special Handling</td>
</tr>
<tr>
<td></td>
<td>Faculty from other UC Campuses – <strong>Concurrent Hire</strong></td>
<td></td>
</tr>
</tbody>
</table>
Hiring Process Workflows – By Faculty Type

HIRING LADDER RANK FACULTY, LSOE, LPSEO

No Summer Session Position Needed in UCPath.

SUMMER SESSION

Verify eligibility + email appointment letter

Add name to Schedule of Classes

ACADEMIC DEPARTMENT

Enter Name in ISA

INSTRUCTOR

Accept appointment via email

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

JANUARY - JUNE

JUNE - JULY
Hiring Lecturers Who Taught in 2020-2021 AY

Summer Session Position Needed in UCPath.

**Fun Run**

**ACADEMIC DEPARTMENT**

START Enter Name in ISA

- Create position and hire in UCPath (Rehire, Concurrent hire) NO COMPENSATION
- JUNE/JULY - Add additional pay onto SS position/job via PayPath

**DEAN OF UNDERGRADUATE EDUCATION**

- JANUARY - JUNE
- JUNE - JULY

**INSTRUCTOR**

Accept appointment via email

- Email appointment letter
- Add name to Schedule of Classes
Hiring Lecturers who did NOT teach in 2020-2021 AY, and Recalls

Summer Session Appointment File + Position Needed in UCPath.

START
Enter Name in ISA

Submit appointment file via Interfolio

Review appointment file

Add name to Schedule of Classes

Email appointment letter

Create position and hire in UCPath (New hire, Rehire, Concurrent hire) NO COMPENSATION

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

Accept appointment via email

Appointment approved?

Yes

No

ACADEMIC DEPARTMENT

SUMMER SESSION

DEAN OF UNDERGRADUATE EDUCATION

INSTRUCTOR

JANUARY - JUNE

JUNE - JULY
Special Handling Required

**FY Appointments (Staff, Researchers, Postdocs)**
- Reduce FTE on current appointment to fit a 50% (or 100%) Summer Session teaching appointment.
- Alternatively, accrued vacation time can be used. See Guidebook for details.
- Process a Lecturer Concurrent Hire.

**Faculty from other UC Campuses**
- Both UC campuses must sign a Multi-Location Agreement Form before the appointment begins.
- UCSD department processes a Concurrent Hire. (No longer a fund transfer between campuses.)

Refer to the Job Aid: How to Manage Multi-Location Appointments  
[https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions](https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions)
Adjunct Professors
If their existing Adjunct Professor Job is without salary, you need to change it for the Summer Session pay, and then change it back to without salary.

- Remove the UCWOS comp rate and make it a 0 FTE job.
- Enter the Summer Session additional pay.
- After the payment has processed, change the title/job back to UCWOS comp rate and the correct FTE.

Teaching Remotely – Outside of CA
Visiting instructors teaching remotely outside of CA need to complete 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 also complete an Out-of-State tax form. Instructions can be found at:

Teaching Remotely – International Faculty
International Faculty teaching remotely need to complete a Temporary Remote Work Agreement.
https://aps.ucsd.edu/faculty-resources/covid-19/leavefaq.html#Temporary-Remote-Work-Agreement

The Instructor must also complete a Foreign Source Income Statement form. Instructions can be found here: https://ucpath.ucsd.edu/transactors/local-updates-posts/out-of-state-tax-11252020.html

Materials are also 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.

Visiting Professors
Visiting Professors are eligible to teach Summer Session on a Visiting Professor Job Code. If they have a Visiting Professor job on campus ending 6/30/21, you must:

- Extend the end date
- Change the FTE to 0 (So they do not get paid from your department and Summer Session.)

Hiring them as a 1550 Lecturer would also be fine, since they will only be teaching.
## Hiring Tasks – Summary by Faculty Type

<table>
<thead>
<tr>
<th>Faculty Type</th>
<th>Need an Appointment File?</th>
<th>Need a Position &amp; Hire in UCPath</th>
<th>Which Hire Template?</th>
<th>Additional Pay via PayPath in June/July</th>
<th>Job Code</th>
<th>Special Handling?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Walk in the Park</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ladder Rank Faculty, LSOE, LPSOE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Fun Run</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lecturer Taught at least 1 quarter during 2020-2021 AY</td>
<td>X</td>
<td></td>
<td>Rehire</td>
<td>X</td>
<td>1550</td>
<td></td>
</tr>
<tr>
<td>Lecture Taught in 2020-2021 AY and Has an appointment starting 7/1/21 (Paid on 09/12 basis)</td>
<td>X</td>
<td></td>
<td>Concurrent Hire</td>
<td>X</td>
<td>1550</td>
<td></td>
</tr>
<tr>
<td><strong>10 K</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lecturer Summer Session teaching only</td>
<td>X</td>
<td></td>
<td>New Hire or Rehire</td>
<td>X</td>
<td>1550</td>
<td></td>
</tr>
<tr>
<td>Lecturer Did NOT teach in 2020-2021 AY Has an appointment starting 7/1/21 (Paid on 09/12 basis)</td>
<td>X</td>
<td></td>
<td>Concurrent Hire</td>
<td>X</td>
<td>1550</td>
<td></td>
</tr>
<tr>
<td>Recall Faculty</td>
<td>X</td>
<td></td>
<td>Concurrent Hire</td>
<td>X</td>
<td>1700, 1702</td>
<td></td>
</tr>
<tr>
<td><strong>Triathlon</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>FY Appointments (Staff, Researchers, Postdocs)</td>
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<td>1550</td>
<td>Reduce current appointment to fit 50% or 100% Summer Session teaching, or used accrued vacation time.</td>
</tr>
<tr>
<td>Faculty from other UC Campuses</td>
<td>X</td>
<td></td>
<td>Concurrent Hire</td>
<td>X</td>
<td>1108, 1208, 1308</td>
<td>Both campuses must sign Multi-Location Agreement Form.</td>
</tr>
</tbody>
</table>
# 2021 Hiring Deadlines for Academic Units

<table>
<thead>
<tr>
<th>Department Task</th>
<th>Target Deadline</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter instructor names in ISA</td>
<td>ASAP</td>
<td>[ISA Quick Start Guide]</td>
</tr>
<tr>
<td>Submit appointment files in Interfolio</td>
<td>By March 12th</td>
<td>See below</td>
</tr>
<tr>
<td>Create positions in UCPath</td>
<td>Start in December</td>
<td>See page 22</td>
</tr>
</tbody>
</table>
| Process Hires in UCPath                 | When instructor accepts appointment via email.  
                                      | Session 1 - Hires complete end of May  
                                      | Session 2 - Hires complete end of June | See page 22 |
| Enter Additional Pay                    | Wait for June & July                  | Payroll Training in Spring Quarter |

## How to Submit Appointment Files

1. Use the following chart to identify which documents are required for your candidate.
   a. Effective Summer Session 2021 – A Bio/Bib is no longer required in Summer Session appointment files.
Faculty Appointment File Chart

Required documentation for faculty is listed below. First select the appropriate faculty type and title code in Column 1. Reading from left to right, boxes with “X” indicate the required document.

Effective Summer Session 2021 - Bio/Bibs are no longer required in appointment files.

Associates-In, Title Code 1506, are not included in this chart. Refer to Graduate Division presentation for details on processing Associates-In Summer Session applications through the IA System.

<table>
<thead>
<tr>
<th>Faculty Type &amp; Academic Year Title Code</th>
<th>Summer Session Title Code</th>
<th>No Documents Required</th>
<th>Appointment Summary Form</th>
<th>Dept. Chair Memo</th>
<th>Teaching Evaluations (CAPE) or Reference Letter</th>
<th>CV¹</th>
<th>Recall Form (UCSD)</th>
<th>Exception Letter to Reduce Appt % and/or use Vacation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prof AY-1100</td>
<td>1100,1200,1300</td>
<td>X</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Assoc Prof AY-1200</td>
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<tr>
<td>Asst Prof AY-1300</td>
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</tr>
<tr>
<td>Prof AY BEE-1143</td>
<td>1143,1243,1343</td>
<td>X</td>
<td></td>
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<tr>
<td>Assoc Prof AY BEE-1243</td>
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<tr>
<td>Asst Prof AY BEE-1343</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lect SOE 1603,1604,1607,1608</td>
<td>1603,1604,1607,1608</td>
<td>X</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lect PSOE 1600,1602,1605,1606,1680</td>
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<tr>
<td>Lect AY 1630,1631,1632</td>
<td>1550</td>
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<tr>
<td>Lect AY Teaching Current Year</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Lect AY 1630,1631,1632</td>
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<tr>
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<tr>
<td>Assoc Prof AY BEE-1243</td>
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<tr>
<td>Asst Prof AY BEE-1343</td>
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<tr>
<td>Lect AY 1630,1631,1632</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Lect AY 1630,1631,1632</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjunct Professor AY 3258,3268,3278</td>
<td>3258,3268,3278</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

¹A current CV is not required for repeat Visiting Faculty who have taught for Summer Session on a continuous basis. A current CV is required if there is a break in summer teaching or if the instructor is new and has never taught for Summer Session.

²Full-time HCOMP faculty are not eligible to receive additional compensation for teaching Summer Session courses per APM-662.

³If Researcher has an underlying professorial appointment, use the corresponding Summer Session Title Code from Column 2.
2. Download blank forms at:  
https://academicaffairs.ucsd.edu/aps/advance-train/forms.html#Appointments

3. See Appendix A. for sample completed forms.

4. Address Department Chair Memo to:

   John C. Moore, Dean of Undergraduate Education

5. Create Case in Interfolio using the Summer Session Appointment template.  
Job Aid can be found in Appendix A., or on the AP SharePoint site.

6. Upload your documents into the Interfolio Summer Session Appointment template as shown in the table below.

<table>
<thead>
<tr>
<th>Template Section</th>
<th>Forms to Include</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Summary</td>
<td>Appointment Summary Form or Recall Form</td>
</tr>
<tr>
<td>2. Recommendations</td>
<td>Dept. Chair memo to DUE</td>
</tr>
<tr>
<td>3. Evidence of Teaching Effectiveness</td>
<td>CAPES or Reference Letter</td>
</tr>
<tr>
<td>4. Candidate Documents</td>
<td>CV</td>
</tr>
</tbody>
</table>

Appointment File - Tips for Success

Propose annual salary that aligns with comparable faculty & fits on the 7/1/19 UC academic salary scale. (Don’t match home institution salary.)

Suggestion: If CAPES are below 70% rating with 40% response rate, propose action plan to increase responses.

   Tips for increasing CAPE response can be found at:  
http://www.cape.ucsd.edu/faculty/tips.html

Teaching CAPES are more important than TA evaluations. Two sets of CAPES are usually sufficient – you don’t need to submit all CAPES.

If proposing a first-time instructor, the letter to DUE should include the type of support that will be provided: faculty mentor, Teaching + Learning Commons, other department support. See Appendix D. for information on the Teaching + Learning Commons services.
Summer Session Sends Appointment Letters

1. Upon DUE approval of an appointment file, Summer Session generates an appointment letter and emails it to the instructor, copies the department MSO, and uploads a copy to OneDrive.

2. Faculty are required to reply if they accept or decline the appointment by emailing summer.payroll@ucsd.edu.

3. Upon acceptance of the appointment, the instructor will be assigned to the course on the Schedule of Classes.
   a. If the instructor does not have a PID, they need to be hired in UCPath before their name can be added to the Schedule of Classes.

4. After an overnight refresh, the instructor will have access to campus systems. An additional overnight refresh may be required for Canvas access.
How to Enter Positions & Hires in UCPath

Refer to the UCPath Job Aids under Template Transactions:
https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions

- How to Process Payments for Lecturers in Summer Session
- How to Process Summer Salary for Professors, LSOE, and Recalls

Tips for Summer Session Positions & Hires
You can re-use UCPath positions from Summer Session 2020. However, be sure to change the funding if it differs for 2021.

If creating new positions, start the position at least one month before the anticipated hire date. Need to allow enough effective dated rows if position corrections are required.

Add funding using blank Earn Code row(s); all earnings will be from ASN Earn Code entered as Additional Pay.

Quick Reference

<table>
<thead>
<tr>
<th>Instructor Type</th>
<th>Job Code</th>
<th>Hire Template</th>
<th>FTE</th>
<th>Job Data tab – Job Compensation section</th>
<th>Effective Date (First day of pay period)</th>
<th>Expected Job End Date (Last day of pay period they will be paid)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecturers</td>
<td>001550</td>
<td>Choose 1: New Hire</td>
<td>0</td>
<td>Leave blank (Do not enter any Comp Rate Codes or Amounts)</td>
<td>7/1/21 or 8/1/21</td>
<td>7/31/21 or 8/31/21</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rehire</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Concurrent Hire</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recalls</td>
<td>001700</td>
<td>Concurrent Hire</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Good practice:
In your Comments to UCPC note that the job compensation should be 0, and payment will be issued via Additional Pay

You can note the actual Summer Session service dates in the comments. (We don’t show service dates in UCPath like we did in PPS. Only pay period dates are entered.)

Additional Pay – Enter in June/July
Summer Session and Graduate Division will have another training session in Spring quarter to talk about how to enter additional pay for Summer Session instructors.
APPENDICES

Appendix A.  Interfolio Job Aid
Appendix B.  Sample Appointment File Documents
Appendix C.  Sample Appointment Letter
Appendix D.  Teaching + Learning Commons Services for Instructors
Appendix E.  Excerpts from APM
APPENDIX A. Interfolio Job Aid

**UC San Diego**

**Summer Session Appointment File Creation**

1. Login via review.ucsd.edu
2. Click on ‘Cases’ under the Review, Promotion and Tenure menu on the left hand side of the screen
3. Click on ‘Create Case’
4. Choose the home department or ORU for this appointment
5. Choose the ‘Summer Session Appointment’ template
   - Note: Unlike the other templates created for your department, this template is not department specific.

**New Case**

- Blank Case
  - A blank case that can be customized to match your requirements
- Summer Session Appointment
  - This template should be used for summer session appointees.

6. Search for a Candidate or enter their name and email address
7. Click ‘Continue’
8. Update the candidate requirements (if applicable)
9. Click ‘Continue’
10. Create any additional Internal Case Sections that you want to add to the file (if any)
    - Do not change the sections that are already created
11. Click ‘Continue’
12. On the Case Review Steps page, click on the pencil icon on the first step of the workflow, “Department Review”

**Case Review Steps**

- Department Review
  - Departmental AP Staff (0)
  - No Instructions, No Required Documents

Page 1 of 4  Summer Session  3/11/19
13. Click ‘Add Committee’

**Edit Step**

<table>
<thead>
<tr>
<th>Name</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Review</td>
<td>MMM d, yyyy</td>
</tr>
</tbody>
</table>

- **Departmental AP Staff**: This committee can move the case forward and backward.

- **Add Committee**

14. Click on ‘Individual User’ then search for your name and/or the names of anyone else in the department who needs added in order to work on this file and click “Add”

**Edit Step**

<table>
<thead>
<tr>
<th>Name</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Review</td>
<td>MMM d, yyyy</td>
</tr>
</tbody>
</table>

- **Departmental AP Staff**: This committee can move the case forward and backward.

- **Who is reviewing the case at this step?**
  - ○ Standing Committee
  - ○ Ad Hoc Committee
  - ○ Individual User

  An individual user can review the case, but will not be able to collaborate with others. To allow multiple members to review together, create a standing or ad hoc committee.

- **Search For An Individual User**

  **Search for an existing user**

  ![Search for an existing user input field]
15. When you done adding users to the step, you can close the window. You are now added to the workflow step as a reviewer.
   - You can leave the generic committee, “Department AP Staff” on the step.

16. Repeat steps 12-15 for the last step in the workflow, “Notify Department of Final Action”
   - Make sure to add your Department Chair to this step if they need to see the final outcome letter in the system.

17. Once that has been completed, you can click “Continue” at the bottom of the screen and the file has been created! Continue notifying the candidate, uploading documents, etc like you normally would.
   - Note: PDF summary forms will need to be uploaded until the AP Data integration for appointment files is complete.
APPENDIX B. Sample Appointment File Documents

Departments are responsible for gathering the required documents. See chart on page 18 for list of required documents based on faculty type.

Please refer to the Graduate Division presentation for details on Associates-In appointments.

The following pages contain samples of the required appointment file documents. If you have any questions, please contact Lisa Bargabus at summer-payroll@ucsd.edu.

Blank forms can be found here:
https://academicaffairs.ucsd.edu/aps/advance-train/forms.html#Appointments

Academic Appointment Summary Form
Department Chair Memo
Reference Letter
BIO/BIB
Recall Form
# Appointment Summary Form

Please complete all 5 Sections:

## Section 1
- Full name of faculty being proposed
- Department proposing instructor
- Degree information
- Begin and end dates for session

## Section 2
- **Present Status**
  - Date
  - Home Institution
  - Title
  - Annual salary and % of time

- **Proposed Status**
  - Title (Lecturer in Summer Session)
  - Title code
  - Proposed annual salary and % of time
  - UC San Diego salary scale and session; academic or fiscal

## Section 3
- Signature of Department Chair (Academic Departments) or Provost (College Programs) or Divisional Dean (Interdisciplinary Programs)

## Section 4
- **Previous UC Experience** (List previous summer(s) if a returning Lecturer.)
  - Dates
  - Title
  - Annual salary
  - % of time
  - Department (if applicable)

## Section 5
- **Proposed Classes**
  - Quarter/Session
  - Course#
  - Course Title
  - Projected enrollments and session based on prior offerings, if applicable
  
  *Tip: Summer Session enrollments are typically 1/3 the size of F/W/S courses.*
Appointent Summary Form Sample
Lecturer in Summer Session

ACADEMIC APPOINTMENT SUMMARY FORM FOR TEMPORARY EMPLOYEES

Name: Neville Longbottom
Highest Degree/Institution/Year: PhD/UCSD/SP20
Department: Political Science
College of FTE: 
Begin Date: 08/29/2020 End Date: 08/01/2020

Present Status (Date: SP20)
Institution: UCSD
Title: Associate-In
Title Code: 1506
% of Time: 50
Basis: Academic ✐ Fiscal ☐

Proposed Status
Title: Lect in Summer Session
Title Code: 1550
Salary: $56,381.00 % of Time: 50
(7/1/19 Unit 18 scale) Qtr: S120
Basis: Academic ✐ Fiscal ☐
Funding Source: ☐ Current Year Cost: 

Dept/Div Chair Signature: Hermione Granger Date: 01/10/20

On Leave from Home Institution 
Registered UC Grad. Student 
Merit/Salary Incr Retired Faculty 3-year Appt. Concurrent Appt.

Previous UC Experience

<table>
<thead>
<tr>
<th>Dates</th>
<th>Title</th>
<th>Annual Salary &amp; Salary Scale (Indicate Merits with *)</th>
<th>% Time</th>
<th>Dept/UC Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP20</td>
<td>Associate-In</td>
<td>$54,428</td>
<td>50</td>
<td>Political Science</td>
</tr>
</tbody>
</table>

Total Unit 18 Qtrs in dept as of ____________ (indicate end date of last Unit 18 Appt)

Proposed Classes

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Course No.</th>
<th>Course Name</th>
<th>Hours/Week for (P.E.)</th>
<th>Enrollments Projected</th>
<th>Enrollments Actual (past 2 yrs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>S120</td>
<td>PS30</td>
<td>Political Inquiry</td>
<td>50</td>
<td>S219 - 48</td>
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</table>

Other Duties: 
Name of Designated Supervisor(s):

<table>
<thead>
<tr>
<th>REVIEW ACTION</th>
<th>Approve</th>
<th>Disapprove</th>
<th>Modify</th>
<th>Date</th>
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<tbody>
<tr>
<td>Reviewing Provost</td>
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<tr>
<td>Dean-SIO</td>
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<td></td>
</tr>
<tr>
<td>Dean-SOM/SSPPS</td>
<td></td>
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</tr>
<tr>
<td>Divisional Dean</td>
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</tr>
<tr>
<td>Dean UE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Rev. 05/18
MEMO

PLEASE INCLUDE ALL APPLICABLE COMPONENTS:

1. Date
2. Address to: John C. Moore
   Academic Affairs
   Dean of Undergraduate Education (DUE)
3. Department Chair (Academic Departments), Provost (College Programs), or Divisional Dean (Interdisciplinary Programs)/Name of Academic Department, College Program, or Interdisciplinary Program and email endorsement memo
4. Request must include full name of faculty being proposed, status, session
5. Department making request
6. Full name of faculty being proposed, status, session
7. Proposed annual teaching salary (noting scale, i.e. Unit 18 or Professor Series
8. Proposed courses
9. Teaching qualifications including degrees
10. Teaching evaluation summary (i.e. CAPE) or Reference Letter
   • If CAPES are low, explain strategy for improvement
11. If applicable:
   • Fiscal Year Appointment needs exception noted
   • Visa per BIO/BIB, needs confirmation of status with the International Center
   • For first-time lecturers, please recommend a Teaching + Learning Commons consultation and assign a faculty mentor.
DATE: January 27, 2021

TO: John C. Moore
    Academic Affairs
    Dean of Undergraduate Education (DUE)

FROM: Dean Deborah Davis, Professor and Chair  Deborah Davis
       Computer Science and Engineering Department

RE: Appointment for Steve Software as Visiting Lecturer, Summer Session 2021

The Department of Computer Science and Engineering proposes the appointment of Steve Software as a Visiting Lecturer for Summer Session 2, 2021 at an annual salary of $104,524 (7/1/19 Unit 18) to teach the course listed below:

Course Title: CSE 5A. Introduction to Programming I (4) Introduction to algorithms and top-down problem solving. Introduction to the C language, including functions, arrays, and standard libraries. Basic skills for using a PC graphical user interface operating system environment. File maintenance utilities are covered. A student may not receive credit for CSE 5A after receiving credit for CSE 11 or CSE 8B. Recommended preparation: A familiarity with high school-level algebra is expected, but this course assumes no prior programming knowledge. Prerequisites: restricted to undergraduates. Graduate students will be allowed as space permits.

Steve Software is the Owner/Software Engineer at Imagine Group, and the San Diego Regional Manager at CODE. Mr. Software received his bachelor’s degree in Computer Engineering from the University of California, San Diego (1996) and he received his master’s degree in Technology from the University of Advancing Technology (2009). He has several years of industry experience and has previously held other academic titles, including Lecturer at UCSD (Spring 2016) and Adjunct Professor at University of Advancing Technology (2010-2015). Mr. Software’s evaluations are included in the file. Although his CAPES were low in 2016, he has since gained more teaching experience. The department has assigned Professor Smith and Professor Gold as joint faculty mentors to support Mr. Software in his teaching. Professor Smith will help him with guidance about teaching at UCSD, including classroom observation, and Professor Gold will share class materials and experience for lower-division programming classes. His 2016 CAPE response rate was only 33%, so the department will suggest that Mr. Software provide classroom time for students to complete their evaluation.

<table>
<thead>
<tr>
<th>Course</th>
<th>Term</th>
<th>Enroll</th>
<th>Evals Made</th>
<th>Rcmd Class</th>
<th>Rcmd Instr</th>
<th>Study Hrs/Wk</th>
<th>Avg Grade Expected</th>
<th>Avg Grade Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSD11</td>
<td>SP16</td>
<td>120</td>
<td>40</td>
<td>83%</td>
<td>60.4%</td>
<td>12.62</td>
<td>3.59</td>
<td>3.08</td>
</tr>
</tbody>
</table>
Reference Letter

Please include all items below:

1. Date
2. Address to:
   - Department Chair (Academic Departments)
   - Provost (College Programs)
   - Divisional Dean (Interdisciplinary Programs)
3. Request must include full name for faculty being proposed
4. Referee’s history and length of association with the faculty being proposed
5. Reasons and detailed qualifications for recommendation
6. Referee signature
7. Referee name, title, and department

Note: The reference letter should justify why the candidate is qualified to teach the course.
February 3, 2021

Department Chair
Chemistry and Biochemistry

Re: Appointment for Betty Triton as Lecturer

To Whom It May Concern:

I am writing to enthusiastically support the application of Betty Triton as a lecturer. Betty is currently a senior graduate student in my laboratory. She joined my group five years ago, and will defend her thesis in about a month, March 2021. Her work presents a new model for how adrenergic stimulation in brown adipose tissue becomes relayed into transcriptional changes in the nucleus. Betty has tackled all aspects of her thesis work, whether technical or intellectual, with determination and successfully. She has been recognized with awards and scholarships. A manuscript on her main project will be submitted this coming month. She has already co-authored one study and I expect at least one more manuscript to come from her work in 2021. She is an exceptional student, among the best I have seen in many Universities and Institutes where I have been, and I am confident that she will excel as a scientist, teacher, and mentor.

During her Ph.D. thesis, Betty was also teaching assistant for three graduate courses and participated in mentoring programs for high school students. She was outstanding in these activities. She engaged the students, directed work and/or class, and had great insights into what worked well in teaching. While doing this teaching or mentoring, which was her own calling and not required by our institute, she never let such activities keep her away from the bench, a testament to her ability to work hard and multitask. Moreover, at a personal level, Betty is a delight to work with. She is mature, independent, and resourceful, knowing when and where to seek advice and help. She expresses her opinions in an engaging way and enjoys being challenged. She strives for originality, works hard and undeterred and has a charisma for drawing others to comment and participate in her work. She is full of enthusiasm, has the right drive, and genuine interest in teaching and in science, an analytical and keen mind, creativity and perseverance. She multitasks with ease and does not lose her focus on the goals she sets.

In summary, I have no doubt that Betty will be an outstanding teacher. Please do not hesitate to call or email me if you have any further questions.

Yours sincerely,

Lisa Scholar

Lisa Scholar, Ph.D.
Associate Professor
Department of Chemical Physiology
10550 North Torrey Pines Rd/MB24
La Jolla, California 92037
Tel. 858-534-4744
Fax 858-822-2619
Recall Form

Please complete all 6 Fields:

1. **Employee Information**
   - Employee ID (EID)
   - Name of Recall (Emeriti) Faculty

2. **Status at Time of Retirement**
   - Home campus should be UC San Diego
   - Title
   - Home department
   - Step: 1, 2, etc. (select from dropdown)
   - Basis: AY or FY (select from dropdown)
   - Scale Type: Standard
   - Retirement date
   - Annual salary
   - Scale date

3. **Proposed Recall Appointment**
   - School/Division (select from dropdown)
   - Recall type (check appropriate box)
   - Primary department
   - Annual salary
   - Scale date
   - Begin date/End date: Teaching start and end date
   - Percent time: 50% if teaching one course, 100% if teaching two in a session
   - Fund sources: Summer Session
   - Per 4-unit course rate: 8.5% of annual teaching salary
   - Total annual compensation: total annual teaching salary

4. **Proposed Recall Duties**
   - Purpose of recall: Check “teaching” box
   - Description of recall duties: i.e. teaching MAE101 in Summer
   - Teaching assignment: Session, Course#, Course title
5. **Retiree Acknowledgement**
   - All appropriate boxes must be checked
   - Faculty’s actual signature is required (if typed in or an electronic signature, an email is required from the instructor to the department showing the form as an attachment or included in the body of the email)
   - Date signed

6. **Recommendation and Approval**
   - Department Chair (Academic Departments) or Provost (College Programs) or Divisional Dean (Interdisciplinary Programs)
   - Date signed
## Recall Form Sample

### UCSD Academic Recall Appointment

<table>
<thead>
<tr>
<th>Employee Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID: 398450</td>
<td>Name: Tommy Triton</td>
</tr>
<tr>
<td>Status At Time Of Retirement</td>
<td></td>
</tr>
<tr>
<td>Home Campus:</td>
<td>Title: Professor</td>
</tr>
<tr>
<td>Home Department: MAE</td>
<td>Step: 6 Basis: AY Scale Type: Standard</td>
</tr>
<tr>
<td>Retirement Date:</td>
<td>Annual Salary: $111,800 Scale Date: 10/07</td>
</tr>
</tbody>
</table>

### Proposed Recall Appointment

<table>
<thead>
<tr>
<th>School/Division: JSOE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Department: MAE</td>
<td></td>
</tr>
<tr>
<td>Secondary Department:</td>
<td></td>
</tr>
<tr>
<td>Begin Date: 06/29/21</td>
<td>End Date: 07/31/21</td>
</tr>
<tr>
<td>Annual Salary: $139,200</td>
<td>Scale Date: 07/01/20</td>
</tr>
<tr>
<td>Percent Time: 50%</td>
<td></td>
</tr>
<tr>
<td>Fund Sources(s):</td>
<td>Per Course Rate (teaching only): $11,832</td>
</tr>
<tr>
<td></td>
<td>Total Annual Compensation:</td>
</tr>
</tbody>
</table>

### Proposed Recall Duties

- **Purpose of Recall:** Teaching
- **Description of Recall Duties:**
  - MAE101 for Summer Session

### Teaching Assignment

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Course #</th>
<th>Course Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>S120</td>
<td>MAE101</td>
<td>Up the Air 10/10</td>
</tr>
</tbody>
</table>

### Retiree Acknowledgement

- I understand that my total annual recall compensation from all UC sources may not exceed 45% of my annual salary at the time of retirement, adjusted to the current pay scale.
- I understand that I will be subject to the terms and conditions of the HSCP, if applicable.
- I understand that my appointment is contingent upon the availability of funding and programmatic considerations.
- I understand that my recall appointment cannot begin prior to receipt of my first retirement income check.

### Please note if you have been recalled at another UC campus within the past 12 months:

- **Campus:**
- **Dates:**

<table>
<thead>
<tr>
<th>Tommy Triton</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Signature</td>
</tr>
</tbody>
</table>

### Recommendation and Approval

<table>
<thead>
<tr>
<th>Department Head Signature</th>
<th>Date: 01/26/21</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Secondary Department Head (for joint appointments)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean, Assoc VC, VC-ORA, VCHS, VCMS</td>
<td>Date</td>
</tr>
<tr>
<td>Executive Vice Chancellor – Academic Affairs</td>
<td>Date</td>
</tr>
</tbody>
</table>

Rev. 12/21
APPENDIX C. Appointment Letter Process

1. Upon DUE approval of an appointment file, Summer Session generates an appointment letter and emails it to the instructor and copies the department MSO.

2. Faculty are required to reply if they accept or decline the appointment by emailing summer-payroll@ucsd.edu.

3. Upon acceptance of the appointment, Summer Session will assign the instructor to the course on the Schedule of Classes.

   Note: The instructor must have an active appointment in UCPath with a PID in order to be added to the Schedule of Classes.

4. After an overnight refresh, the instructor will have access to campus systems. An additional overnight refresh may be required for Canvas access.
Appointment Letter Sample

UNIVERSITY OF CALIFORNIA, SAN DIEGO
UCSD

OFFICE OF SUMMER SESSION

January 18, 2021

Neville Longbottom
Psychology

SUBJECT: 2021 Summer Session Appointment

<table>
<thead>
<tr>
<th>Course, Units: PSYC 4, 4 Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session: Session I, 5 Weeks</td>
</tr>
<tr>
<td>Dates: 6/28/21 – 7/21/21</td>
</tr>
<tr>
<td>Percent of Time: 50% Appointment</td>
</tr>
</tbody>
</table>

Important Dates

- 6/21: Your Deadline to Cancel this Appointment
- 6/27: Course Cancellation Deadline (if low enrollment)
- 7/8: Final Course Grade Calculated
- 7/21: Pay Date
- 5/30: e-Grades Due to Register
- 7/25: Holiday - Campus closed, No class meetings.

Please accept the terms of this appointment within 10 days of this letter by replying to this email with the following statement:

"I, Neville Longbottom, accept the terms of the appointment letter dated January 18, 2021 to teach PSYC 4."

Course Salary

- 10-14 students enrolled, MINIMUM Course Salary $800/student, not to exceed $4,702
- 15 or more students enrolled, MAXIMUM Course Salary $4,702

*Calculated as 8.5% of $56,391, your UCSD Academic annual salary effective June 30, 2021.

Summer Session compensation aligns with the policies outlined in the UCOP Academic Personnel Manual (APM) and the UC San Diego Policy & Procedure Manual. Summer Session instructors earn a maximum of 33% (or 3/9ths) of your annual academic year salary during the three month summer period (July-September). You will not be eligible for Summer Session compensation that exceeds the 33% annual salary maximum. (See APM-400, APM-661, APM-662, and PPM-230-43.)

Campus Policies

☐ Ladder-rank faculty and Teaching Professors (LSE/LSOE) may earn a maximum of 10% annual salary per month. Teaching two or more Summer Session classes may require spreading your payment over July-September as needed to align with AP policy. (See APM-600, APM-661, APM-662, and PPM-230-43.)

☐ Lecturer appointment terms and conditions are set forth in the Memorandum of Understanding between the University of California and the University Council American Federation of Teachers, Non-Senate Instructional Unit. The agreement can be retrieved at https://ucnet.universityofcalifornia.edu/aboardbargaining-units/fc/contact.html.

☐ Recall appointments may earn a maximum of 43% per month, based on your UCSD academic salary at the time of recall (range-adjusted to current dollars). Summer Session compensation may be spread over July - September as needed to align with AP policy. Policy applies to all recall appointments during the summer months. (See APM-265.)

☐ Fiscal-year appointees at 100% time may use vacation days or temporarily reduce their fiscal-year appointment to teach Summer Session courses. Contact your department staff for details on the impact of reducing your fiscal-year appointment (HR, benefits, etc.) (See APM-520, APM-661, APM-662, and PPM-230-43.)
Standard compensation for one 4 Unit summer session course is 8.6% of your nine-month UCSD academic salary as of June 30, 2021. Compensation per course is calculated based on student enrollment. Summer Session takes two snapshots of enrollment to calculate your salary at the highest amount. Additional details are available at the 2021 Guidebook link referenced below.

If you want to cancel your teaching appointment, please contact your Department Chair by June 2, 2021. The department will contact Summer Session to decide if a new instructor can be assigned or if the course will be canceled. If enrollment is fewer than 10 students on June 2, 2021, Summer Session reserves the right to cancel the course and your appointment to teach this course. Summer Session will notify you by June 7, 2021 if your course is canceled due to low enrollment.

Summer Session compensation is subject to state and federal taxes and all other deductions as required by law and University regulations. All offers of appointment are contingent upon documentation of employment eligibility in compliance with the Immigration Reform and Control Act of 1986. This appointment is subject to all rules and regulations of the University of California and UC San Diego.

Beginning March 19, 2021, information regarding course scheduling such as the days, times and location of your course can be viewed at http://Tritonlink.ucsd.edu.

If you have questions, please contact Lisa Bargbas at summer-payroll@ucsd.edu

I hope you have a pleasant and rewarding summer.

Becky Arce, Director
(619) 534-7074
barce@ucsd.edu
http://summer session.ucsd.edu

cc: Business Officer

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**Figure A: Summer Session Compensation Timeline**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/13/21</td>
<td>Students begin enrollment</td>
</tr>
<tr>
<td>6/2/21</td>
<td>Your deadline to cancel this appointment</td>
</tr>
<tr>
<td>6/2/21</td>
<td>1st Snapshot: Verify course enrollment</td>
</tr>
<tr>
<td>6/7/21</td>
<td>Deadline to cancel course if low enrollment</td>
</tr>
<tr>
<td>7/6/21</td>
<td>2nd Snapshot: Calculate final course salary</td>
</tr>
</tbody>
</table>

**Figure B: Summer Session Course Salary – Full vs Contingent**

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>Your Course Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10 students</td>
<td>$0</td>
</tr>
<tr>
<td>10-14 students</td>
<td>Minimum Course Salary $0.00 per student</td>
</tr>
<tr>
<td>15 or more students</td>
<td>Maximum Course Salary $4,792*</td>
</tr>
</tbody>
</table>

* Your maximum course salary is calculated as 8.5% of $56,381, your UCSD annual teaching salary effective June 30, 2021.
APPENDIX D. Teaching + Learning Commons Services

More details can be found at: https://commons.ucsd.edu/educators/index.html and https://keepteaching.ucsd.edu
APPENDIX E. Excerpts from Academic Personnel Manual

APM-661
http://www.ucop.edu/academic-personnel-programs/_files/apm/apm-661.pdf

APM-662
http://www.ucop.edu/academic-personnel-programs/_files/apm/apm-662.pdf
661-0 **Policy**

Academic appointees may receive additional compensation for Summer Session teaching. For Additional Compensation: Additional Teaching, see [APM - 662](#) and for Additional Compensation: University Extension (UNEX), see [APM - 663](#).

661-14 **Eligibility**

Only the following academic appointees may receive additional compensation for Summer Session teaching:

a. Academic-year appointees;

b. Appointees holding split appointments partly on an academic-year basis and partly on a fiscal-year basis, provided the fiscal-year portion of the appointment is less than half-time during the Summer Session period;

c. Full-time fiscal-year faculty appointees who are granted a temporary reduction in their percentage of appointment or those who relinquish outside professional activity days or vacation days equal to one day for every six contact or podium hours with students;

d. Part-time fiscal-year faculty who are granted a temporary increase in their percentage of appointment. Fiscal-year faculty appointed less than 50 percent in a Health Sciences Compensation Plan school cannot increase the percentage of appointment to more than 50 percent;1

e. Full-time fiscal-year non-faculty appointees who are granted the use of vacation days or a temporary percentage reduction in their current appointment.

661-16 **Restrictions**

a. Compensation for academic-year appointees may not exceed three-ninths during the summer period.

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1Any appointment more than 50 percent affects a faculty member’s eligibility to participate in the Health Sciences Compensation Plan. (See APM - 670, Health Sciences Compensation Plan.)
Additional Compensation: Summer Session Teaching

b. Compensation for fiscal-year appointees may not exceed one-twelfth of the annual salary per month of teaching. This is effective for appointments made July 1, 2014 or later. Those appointed prior to July 1, 2014 to the Professor, Astronomer or Agronomist series are eligible for payments up to one-eleventh of the annual salary of a fiscal-year appointee.

c. These additional compensation maximums are cumulative of all concurrent sources of additional University compensation.

d. Full-time Health Sciences Compensation Plan faculty are not eligible to receive additional compensation for Summer Session teaching.

661-18 Salary

a. Summer Session teaching

The amount of pay is negotiated based on the teaching load. Each campus shall determine the formula by which pay is calculated.

b. Additional compensation for Summer Session teaching shall be calculated based on the salary rate in effect June 30 of the calendar year in which the Summer Session begins.

c. Faculty shall inform the department chair of the home campus when teaching Summer Session at a University campus other than the home campus to insure pay is accurate and does not exceed policy limits.

661-24 Authority

Each Chancellor is authorized to approve additional compensation for Summer Session teaching for eligible academic appointees.
662-0 Policy

Full-time faculty members may receive additional compensation after obtaining pre-approval from the faculty member’s department chair for specific additional University of California teaching activities as outlined below. For Additional Compensation: Summer Session, see APM - 661 and for Additional Compensation: University Extension (UNEX), see APM - 663.

662-2 Purpose

Compensation for additional teaching is a privilege that must be consistent with the principles in APM - 025 and APM - 671 and not interfere with normal University duties. As a prerequisite for such additional compensation, the faculty member must carry the full approved teaching load for his or her department, even if he or she normally teaches less. Department chairs must take special care to assure that faculty, especially assistant professors, are able to meet expectations for all their responsibilities in teaching, research/creative work, and University and public service.

662-8 Additional Teaching Eligible for Additional Compensation

Two kinds of teaching are eligible for additional compensation, when beyond the assigned teaching load:

a. Teaching of matriculated students in self-supporting University degree or UNEX courses and programs (see APM - 663 for UNEX).

b. Teaching of non-matriculated students, including those in UNEX courses and programs (see APM - 663) and other continuing education courses and programs run by the University.

662-9 Additional Teaching During Summer Period (other than in Summer Session)

Faculty receiving summer compensation may engage in additional teaching up to the APM - 025 limit of one day per week inclusive of all Category I and II outside professional activities performed.
662-14 Eligibility

Faculty titles covered by this policy are listed in APM - 110-4-(15). Faculty participating in the Health Sciences Compensation Plan are subject to the Plan and local campus Implementing Procedures regarding income from additional teaching. See APM - 670, Health Sciences Compensation Plan and APM - 671, Conflict of Commitment and Outside Activities of Health Sciences Compensation Plan Participants, for additional information on the Plan.

662-16 Restrictions

Teaching activities ineligible for additional compensation are:

a. Any course assigned by the department chair as part of the faculty member’s assigned teaching load, including:

   1) A course in a self-supporting degree program (funds from the self-supporting degree program are used to pay for this portion of the faculty member’s assigned teaching load);

   2) Extra teaching duties assigned in place of research and/or service; or

   3) Courses taught in less common modes or locations (e.g., online, off-site, at another campus).

b. Extra courses that are taken on voluntarily are ineligible for additional compensation.

662-17 Limitations on Time

a. Time spent on additional teaching during the academic year or when receiving University compensation or University summer compensation will be deducted from the days available for outside activities provided in APM - 025, and as applicable, under APM - 671.

b. The following rules for calculating time under APM - 025 and APM - 671 must be used, regardless of how much time is actually spent:

   1) For traditional or hybrid in-person instructional formats (lectures, discussions), every six contact or “podium” hours spent with students equals one day.
2) For fully online courses, hours will ordinarily be determined under the assumption that online courses require workloads equivalent to the same or similar in-person course formats.

3) The Chancellor may establish types of teaching for which time calculations may vary, e.g., field supervision, practicums, and established online courses producing lower levels of instructor engagement.

c. Additional teaching hours count toward the limits applicable at the time the teaching takes place. For example, teaching done during the academic year is counted toward the limits that apply during that academic year and may not be paid on a summer-ninths basis. For courses that span the academic year and the beginning or end of the summer or off-duty period, the time shall be allocated in proportion to when the work was performed.

d. Exceptions to the time limit are not allowed for faculty during any period in which they receive part or all of their salary directly charged to contracts and grants.

662-24 Authority

The Chancellor may grant exceptions to the time limits which shall be confirmed in writing prior to the conduct of additional teaching. Such exceptions may be granted:

a. When specific individuals teach beyond the limits, or when all individuals are teaching in a specific additional teaching program, such as a self-supporting degree program. Any individual who teaches beyond the time limits assumes full responsibility for ensuring that full-time effort is devoted to regular University duties;

b. When course assignments are reduced due to other University service, such as serving as department chair;

c. To the general time calculation rule in APM - 662-17.

Other exceptions to this policy, such as payment for courses taught off-site or conducted in University-sponsored for-profit programs, may be recommended for approval by the Chancellor to the Provost and Executive Vice President.