Payroll Training
Summer Session 2024

May 29, 2024
Agenda

What’s New for Summer Session 2024

UCPath Hires & Payments for Faculty and Lecturers

UCPath Hires & Payments for Graduate Students

Q & A

Summer Session - Lisa Bargabus

Graduate Education & Postdoctoral Affairs - Courtney Aguila
<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>7/1/24 - 8/3/24</td>
<td>8/1/24</td>
</tr>
<tr>
<td>Session 2 - 5 Weeks</td>
<td>8/5/24 - 9/7/24</td>
<td>8/30/24</td>
</tr>
<tr>
<td>Special - 3 Weeks 1 of 3</td>
<td>7/1/24 - 7/20/24</td>
<td>8/1/24</td>
</tr>
<tr>
<td>Special - 3 Weeks 2 of 3</td>
<td>7/22/24 - 8/10/24</td>
<td>8/1/24</td>
</tr>
<tr>
<td>Special - 3 Weeks 3 of 3</td>
<td>8/12/24 - 8/31/24</td>
<td>8/30/24</td>
</tr>
<tr>
<td>Special - 8 Weeks</td>
<td>7/1/24 - 8/24/24</td>
<td>8/1/24</td>
</tr>
<tr>
<td>Special - 10 Weeks</td>
<td>7/1/24 - 9/7/24</td>
<td>8/1/24</td>
</tr>
</tbody>
</table>
6 Weeks of Enrollment
Enrollment as of 5/20/24 - 32,374
3,197 students on Waitlists (75% for remote courses)

<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>Students Begin</td>
<td>Enrollment management of the waitlist begins.</td>
<td>Session 1 &amp; Special Session fees due.</td>
<td>Students: Add/Drop courses</td>
<td>Faculty Pay Date 8/1/24 (Session 1 + July Special Sessions)</td>
<td>Summer Session ends. Reporting begins</td>
</tr>
<tr>
<td>Enrolling in Classes.</td>
<td></td>
<td>Session 1 classes begin 7/1/24</td>
<td>Session 2 fees due</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Session 2 student fees assessed.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Decide &amp; Communicate - Will more seats be opened for students on the waitlists?</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Summer Session Payroll = Teamwork!
SET Responses were low for the SET rollout in Summer 2023.

Please encourage your Summer Session instructors to increase their SET response rate.

**SET FAQ for Faculty**
[https://set.ucsd.edu/faculty/faculty-faq.html](https://set.ucsd.edu/faculty/faculty-faq.html)

**Tips to Increase SET Response Rates**
[https://set.ucsd.edu/faculty/tips.html](https://set.ucsd.edu/faculty/tips.html)
Compensation for Standard 4-Unit Course = **11% annual salary**

**NEW** - Teach 3 courses MAX in Summer Session (3/9ths or 33% annual salary is max allowed)

<table>
<thead>
<tr>
<th>3-7 Unit Course</th>
<th>1-2 Unit Course</th>
<th>8+ Unit Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>11% of UCSD AY annual salary</td>
<td>5.5% of UCSD AY annual salary</td>
<td>22% of UCSD AY annual salary</td>
</tr>
</tbody>
</table>

Course Salary – Use AY annual salary in effect on 6/30/24.

Summer Session 2024 is the end of the 2023-2024 AY. So we use the annual salary in effect Spring Quarter 2024.
1st Summer Using Experience-Based Salary Points for Assoc Instructors & TAs

- Use [10/1/23 Salary Scale](#)
- Follow [GEPA guidelines](#) to determine which salary point to use.

1506 Associate Instructors
[Use Salary Point 1, 5, or 7](#)

2310 TAs
[Summer Session Pay Rates by Salary Step & Percentage](#)

Tutors & Readers
[Example Summer Session Payments](#)
How the Financials Work - Funding to Departments

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

Instructional Support
Exact payroll expenses for TAs, Tutors, Readers are reimbursed by Summer Session.

Department Incentive Package
All Departments will receive:
  ● $1,000 per course + $50 per student
  ● Additional $500 per course for every course on the “high impact” course list.

Third-Week equivalent course & enrollment data will be used to calculate incentive funding.
The Teaching + Learning Commons offers ongoing support as you prepare and teach your course for summer, including:

Individual Teaching Consultations ([http://tinyurl.com/ethconsult](http://tinyurl.com/ethconsult)) to explore ideas directly related to your teaching situation.

Workshops and Courses
[https://engagedteaching.ucsd.edu/educators/workshops.html](https://engagedteaching.ucsd.edu/educators/workshops.html)

Summer Teaching Community –
[Join the Summer Teaching Community](https://engagedteaching.ucsd.edu/educators/workshops.html) for access to the latest events and resources, along with access to a Slack space for real-time exchange of questions/ideas with each other and Engaged Teaching Hub staff.

For questions, contact [engagedteaching@ucsd.edu](mailto:engagedteaching@ucsd.edu).
Review: Hiring Faculty, Lecturers & Recalls
One-Time Pay for Faculty and LSOE/LPSOE (SUN GODS)

**SUMMER SESSION**
- Verify eligibility + email appointment letter
- Add name to Schedule of Classes

**ACADEMIC DEPARTMENT**
- Enter Name in ISA
- Accept appointment via email

**INSTRUCTOR**

**JANUARY - JUNE**

**JUNE - JULY**

- JUNE/JULY - Mass upload to process One-Time Payment
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.
  - 1/9th in July + 1/9th in August
  - Or
    - 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).
Ladder Rank Faculty & LSOE/LPSOE might teach classes for other departments/programs.

We need to issue additional pay for the other department’s course salary on their position in your department.

Summer Session will tell you when that is the case, so you can get the funding combo code from the other department/program.
Hiring Lecturers Who Taught During the 2023-2024 Academic Year (STONEHENGE)

**SUMMER SESSION**

1. Email appointment letter
   - **DONE**

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

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

4. JUNE/JULY - Mass upload to process One-Time Payment

**ACADEMIC DEPARTMENT**

- START Enter Name in ISA

- **DONE**

**INSTRUCTOR**

- Accept appointment via email
  - **DONE**

**DEAN OF UNDERGRADUATE EDUCATION**

- After they accept their appointment. Deadlines to cancel classes for low enrollment:
  - S1 & S3 - June 7th
  - S2 - July 12th

JANUARY - JUNE

JUNE - JULY
Summer Session classes can be canceled for low enrollment.

Our goal is to reduce the number of canceled classes.

Summer Session is contacting departments this week about courses with low enrollment.

You can see enrollments on the Schedule of Classes here, https://act.ucsd.edu/scheduleOfClasses/scheduleOfClassesStudent.htm

**Deadline to cancel classes for low enrollment:**
Session 1 & July Special Session Courses       June 7th
Session 2 & August Special Session Courses    July 12th
**POSITIONS**

Reuse Positions from previous Summer Session
* Make sure the funding uses ACS Earn Code.

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 - REHIRE when possible!

Use Pay Period Dates
Effective Date = Beginning of summer pay period 7/1/24 or 8/1/24

Expected Job End Date = Last day of pay period they will be paid 7/31/24 or 8/31/24

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 One-Time Payment.

---

Job Aid: How to Process Payments for Lecturers in Summer Session
https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions
Tips for Summer Session Positions & Hires in UCPath - LECTURERS

**Only Teaching Session 1**
Effective Date: 7/1/24
Expected Job End Date: 7/31/24

**Only Teaching Session 2**
Effective Date: 8/1/24
Expected Job End Date: 8/31/24

**Teaching Sessions 1 & 2**
Effective Date: 7/1/24
Expected Job End Date: 8/31/24

**HIRES**
Choose the right template:
New Hire / Rehire / Concurrent Hire - **REHIRE when possible**!

Use Pay Period Dates
Effective Date = Beginning of summer pay period
*7/1/24 or 8/1/24*

Expected Job End Date = Last day of pay period they will be paid
*7/31/24 or 8/31/24*

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 One-Time Payment.

Job Aid: How to Process Payments for Lecturers in Summer Session
[https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions](https://ucpath.ucsd.edu/transactors/job-aids.html#Template-Transactions)
CONCURRENT HIRE - If a current (active) AY Unit 18 Lecturer has NOT taught as a 1550 LECT in Summer Session before.

REHIRE - If a current (active) AY Unit 18 Lecturer HAS taught as a 1550 LECT in Summer Session before

Why?
Concurrent hire will create another Empl Record. Rehire will not.

<table>
<thead>
<tr>
<th>Empl Record</th>
<th>HR Status</th>
<th>Business Unit</th>
<th>Job Code</th>
<th>Job Code Description</th>
<th>Last Name</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Inactive</td>
<td>SDCMP</td>
<td>001550</td>
<td>LECT IN SUMMER SESSION</td>
<td>Wa...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Inactive</td>
<td>SDCMP</td>
<td>001550</td>
<td>LECT IN SUMMER SESSION</td>
<td>Wa...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Inactive</td>
<td>SDCMP</td>
<td>001550</td>
<td>LECT IN SUMMER SESSION</td>
<td>Wa...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0 Active</td>
<td>SDCMP</td>
<td>001631</td>
<td>LECT-AY-CONTINUING</td>
<td>Wa...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Active</td>
<td>SDCMP</td>
<td>002460</td>
<td>TEACHER-SPEC PROG</td>
<td>Wa...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What's New for 2024?

Reminder - Summer Session does NOT count toward continuing status unless...

Article 23 - Summer Session

Unit 18 Lecturers will receive the equivalent of one quarter toward continuing appointment eligibility on the following conditions:

a. a course taught by a Unit 18 Lecturer during the academic year is moved to Summer Session and the course is no longer offered during the academic year; and

b. that students are required by their academic program to take such a course(s);

c. regardless of these provisions, no Unit 18 Lecturer may earn more than a total of 3 quarters of such eligibility credit during any 12 month period.
What’s New for 2024?

Reminder - Summer Session does NOT count toward continuing status unless...

**Article 23 - Summer Session**

- **Academic Term Count**
  - Summer Session teaching will count as one credit towards Continuing status provided:
    - the Lecturer has not taught all three quarters in the previous academic year and;
    - the course is in the same department, program or unit and;
    - the Lecturer requests such credit.

AFTER Summer Session teaching is complete

- Lecturer can make a formal request via memo to their department
- Dean endorses the request
- Department AP staff enter the summer credit into AP Data.
Hiring Lecturers Who Did Not Teach in the 2023-2024 Academic Year, and Recall Appointees (Red Shoe)

**SUMMER SESSION**

- **DONE**
- **DONE**
- **DONE**
- **DONE**

**ACADEMIC DEPARTMENT**

- **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**

- **DONE**
- **DONE**

**INSTRUCTOR**

- Find replacement
- **DONE**
- **DONE**

**DEAN OF UNDERGRADUATE EDUCATION**

- **DONE**

**JUNE/JULY - Mass upload to process One-Time Payment**

After they accept their appointment. Deadlines to cancel classes for low enrollment:
- S1 & S3 - June 7th
- S2 - July 12th
### Positions

Reuse Positions from previous Summer Sessions

* You must change the funding if it differs. Earn Code remains **ASN.**

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

**Job Code = 001700** (Senate Faculty)
Or
**Job Code = 001699** (Non-Senate Faculty)

**FTE = 0**

### Hires

Use **Rehire** Template if taught in same title before

Need to spread payment over 3 pay periods.

**Effective Date = Beginning of summer pay period 7/1/24**

**Expected Job End Date = Last day of pay period they will be paid 9/30/24**

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 One-Time Payment.

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 (Snake Path)

**SUMMER SESSION**
- **DONE ✔**
  - Review appointment file
- **DONE ✔**
  - Email appointment letter
- **DONE ✔**
  - Add name to Schedule of Classes
- **Done if have PID**

**ACADEMIC DEPARTMENT**
- **DONE ✔**
  - Enter Name in ISA
  - Submit appointment file via Interfolio
  - Find replacement

**DEAN OF UNDERGRADUATE EDUCATION**
- **DONE ✔**
  - Appointment approved?

**INSTRUCTOR**
- **DONE ✔**
  - Accept appointment via email

**JUNE/JULY - Mass upload to process Additional Pay**

- **DONE ✔**
  - Special Handling as Needed
  - Create position and hire in UCPath (Concurrent hire) NO COMPENSATION

**JANUARY - JUNE**

**JUNE - JULY**

- **DONE ✔**
  - After they accept their appointment. Deadlines to cancel classes for low enrollment:
    - S1 & S3 - June 7th
    - S2 - July 12th
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.

If current FY appointment is bi-weekly, change the 1550 LECT position to match their FY FLSA status. Bi-weekly payments will need to be entered manually by the department.
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.
The program allowing appointees to work internationally with temporary work agreements expired in December 2021 and will not be continued.

Teaching from a state outside of California means that taxes are different. Departments will need to be sure that the taxation is set-up properly in UCPath. Appointees who are working outside of California are advised to consult with their tax professional about their tax liability for the state where they are working.
Special Cases - Visiting Professors

Eligible to teach Summer Session with a Visiting Professor job code

If they have a Visiting Prof appointment ending 6/30/24:
- Extend the end date
- Change the FTE to 0

(Otherwise they will get paid from your department and Summer Session.)
Special Cases - Faculty from other UC Campuses

Must complete a Multi-Location Appointment Form before instruction begins.

Job Aid - New form combines OTP and MLA forms

**UCSD** is the **HOST** Location
Other UC Campus is the **HOME** Location

Academic department completes the form.
Send form to Academic Personnel for signature and approval.
AP routes the form to the other UC campus for signature and approval.

Start this process ASAP. (It can take a couple of months.)
How We Will Process One-Time Payments for Faculty & Lecturers

Mass Upload is Required!

One-Time Payment Instead of Additional Pay.
Step 1. Summer Session will create 2 documents for your reference.

1. Instructor List - List of all your instructors and the courses they are teaching.
2. Payment Sheet - Breakdown of how much each person is getting paid and when the one-time pay will be issued.
   a. Will note if you need to get a COA from another department/program.

Both documents will be uploaded to a “Payroll Documents” folder in your department folder on OneDrive: https://go.ucsd.edu/3cPRUEF.

Same folder where your appointment letters are uploaded.
### Sample Instructor List

<table>
<thead>
<tr>
<th>Unit Name</th>
<th>Session</th>
<th>Start Date</th>
<th>End Date</th>
<th>Course</th>
<th>Last Name</th>
<th>First Name</th>
<th>Faculty Type</th>
<th>Course Salary</th>
<th>Annual Salary</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthropology</td>
<td>2</td>
<td>8/5/24</td>
<td>9/7/24</td>
<td>ANTH 101</td>
<td>Jones</td>
<td>Steve</td>
<td>1100 PROF-AY</td>
<td>$19,074</td>
<td>$173,400</td>
<td>also teaching CAT 2 in S2</td>
</tr>
<tr>
<td>Anthropology</td>
<td>1</td>
<td>7/1/24</td>
<td>8/3/24</td>
<td>ANSC 122</td>
<td>Nelson</td>
<td>Nancy</td>
<td>1550 LECT in Summer Session</td>
<td>$7,507</td>
<td>$68,247</td>
<td></td>
</tr>
<tr>
<td>Anthropology</td>
<td>1</td>
<td>7/1/24</td>
<td>8/3/24</td>
<td>ANTH 1</td>
<td>Nelson</td>
<td>Nancy</td>
<td>1550 LECT in Summer Session</td>
<td>$7,507</td>
<td>$68,247</td>
<td></td>
</tr>
<tr>
<td>Anthropology</td>
<td>2</td>
<td>8/5/24</td>
<td>9/7/24</td>
<td>ANSC 120</td>
<td>Simmons</td>
<td>Luke</td>
<td>1550 LECT in Summer Session</td>
<td>$7,288</td>
<td>$66,259</td>
<td></td>
</tr>
<tr>
<td>Anthropology</td>
<td>2</td>
<td>8/5/24</td>
<td>9/7/24</td>
<td>ANTH 111</td>
<td>Crawford</td>
<td>George</td>
<td>1506 ASSOC -IN</td>
<td>$7,556</td>
<td>$68,690</td>
<td></td>
</tr>
<tr>
<td>Anthropology</td>
<td>1</td>
<td>7/1/24</td>
<td>8/3/24</td>
<td>ANAR 144</td>
<td>Vargas</td>
<td>Susan</td>
<td>1607 LSOE-AY</td>
<td>$10,945</td>
<td>$99,500</td>
<td></td>
</tr>
<tr>
<td>Anthropology</td>
<td>1</td>
<td>7/1/24</td>
<td>8/3/24</td>
<td>ANTH 103</td>
<td>Vargas</td>
<td>Susan</td>
<td>1607 LSOE-AY</td>
<td>$10,945</td>
<td>$99,500</td>
<td></td>
</tr>
</tbody>
</table>

### Sample Payment Worksheet

**Payment Worksheet Funding used for Summer Session 2023:**

**PJ 1234567**

Use this list to enter (or double-check) funding in UPath.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Faculty Type</th>
<th>EARN CODE</th>
<th>JULY Pay Period</th>
<th>AUGUST Pay Period</th>
<th>SEPTEMBER Pay Period</th>
<th>Total</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vargas</td>
<td>Susan</td>
<td>1607 LSOE-AY</td>
<td>ACS</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>$21,890</td>
<td>Use mass upload with Grad Div or enter additional pay manually</td>
</tr>
<tr>
<td>Simmons</td>
<td>Luke</td>
<td>1550 LECT in Summer Session</td>
<td>ACS</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>$15,014</td>
<td>Pay both $1 course salaries in July</td>
</tr>
<tr>
<td>Jones</td>
<td>Steven</td>
<td>1100 PROF-AY</td>
<td>ASN</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>$7,556</td>
<td>Use funding from CAT for August payment</td>
</tr>
<tr>
<td>Nelson</td>
<td>Nancy</td>
<td>1550 LECT in Summer Session</td>
<td>ACS</td>
<td>$15,014</td>
<td>*</td>
<td>*</td>
<td>$38,148</td>
<td>Get funding from CAT for August payment</td>
</tr>
</tbody>
</table>

* * *
**Earn Codes for Summer Session**

<table>
<thead>
<tr>
<th>ACS</th>
<th>ASN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ladder-rank faculty</td>
<td>Recalls</td>
</tr>
<tr>
<td>LSOE/LPSOE</td>
<td>Graduate Students (Associates-Ins, TAs, Tutors, etc.)</td>
</tr>
<tr>
<td>Lecturers</td>
<td></td>
</tr>
</tbody>
</table>

Summer Session will include the Earn Codes on the mass upload worksheets for faculty and lecturers.

Departments need to make sure the funding is set for the correct Earn Code.
Step 2. Summer Session will Create Mass Upload Sheets for Each Pay Period

One Mass Upload Template per Pay Period.

1. July Mass Upload Sheet
2. August Mass Upload Sheet
3. September Mass Upload Sheet (if needed)

Mass Upload Sheets will be uploaded to a “Payroll Documents” folder in your department folder on OneDrive: https://go.ucsd.edu/3cPRUEF.

Same folder where your appointment letters are uploaded.
Step 3. Departments/Programs will Fill-in the Mass Upload Sheets

What Departments/Programs Need to Do:

1. Fill-in the Empl Ids, Empl Rcd #s, and Position #s
2. Add DONE to the filename so I know you are finished.

Mass Upload Sheets will be uploaded to a “Payroll Documents” folder in your department folder on OneDrive: https://go.ucsd.edu/3cPRUEF.

Same folder where your appointment letters are uploaded.
Academic Departments/Programs Need to:
1. Fill-in the Empl Ids, Empl Rcd #s, and Position #s
2. Add DONE to the filename so I know you are finished.

Sample JULY Mass Upload Sheet

<table>
<thead>
<tr>
<th>Employee Last Name</th>
<th>Employee First Name</th>
<th>Job Code</th>
<th>Empl Id</th>
<th>Empl Rcd #</th>
<th>Position #</th>
<th>Earnings Begin Dt</th>
<th>Earnings End Dt</th>
<th>Earnings Code</th>
<th>Earnings Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nelson</td>
<td>Nancy</td>
<td>001550</td>
<td></td>
<td></td>
<td></td>
<td>07012024</td>
<td>07312024</td>
<td>ACS</td>
<td>15,014.00</td>
</tr>
<tr>
<td>Vargas</td>
<td>Susan</td>
<td>001607</td>
<td></td>
<td></td>
<td></td>
<td>07012024</td>
<td>07312024</td>
<td>ACS</td>
<td>10,945.00</td>
</tr>
</tbody>
</table>

Sample AUGUST Mass Upload Sheet

<table>
<thead>
<tr>
<th>Employee Last Name</th>
<th>Employee First Name</th>
<th>Job Code</th>
<th>Empl Id</th>
<th>Empl Rcd #</th>
<th>Position #</th>
<th>Earnings Begin Dt</th>
<th>Earnings End Dt</th>
<th>Earnings Code</th>
<th>Earnings Amount</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jones</td>
<td>Steven</td>
<td>001100</td>
<td></td>
<td></td>
<td></td>
<td>08012024</td>
<td>08312024</td>
<td>ACS</td>
<td>19074.00</td>
<td>Use funding from CAT</td>
</tr>
<tr>
<td>Simmons</td>
<td>Luke</td>
<td>001550</td>
<td></td>
<td></td>
<td></td>
<td>08012024</td>
<td>08312024</td>
<td>ACS</td>
<td>7288.00</td>
<td></td>
</tr>
<tr>
<td>Vargas</td>
<td>Susan</td>
<td>001607</td>
<td></td>
<td></td>
<td></td>
<td>08012024</td>
<td>08312024</td>
<td>ACS</td>
<td>10945.00</td>
<td></td>
</tr>
<tr>
<td>Emp ID</td>
<td>Emp Record</td>
<td>Name</td>
<td>Legal First Name</td>
<td>Legal Middle Name</td>
<td>Legal Last Name</td>
<td>Organizational Relationship</td>
<td>HR Status</td>
<td>Business Unit</td>
<td>Position Number</td>
<td>Department</td>
</tr>
<tr>
<td>--------</td>
<td>------------</td>
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</tr>
<tr>
<td>11</td>
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<td></td>
<td></td>
<td></td>
<td>Emp</td>
<td></td>
<td></td>
<td>11111111</td>
</tr>
<tr>
<td>14</td>
<td>12345</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Emp</td>
<td></td>
<td></td>
<td>22222222</td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Emp</td>
<td></td>
<td></td>
<td>33333333</td>
</tr>
<tr>
<td>12</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Emp</td>
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<td>44444444</td>
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<td>13</td>
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<td></td>
<td></td>
<td>Emp</td>
<td></td>
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<td>55555555</td>
</tr>
<tr>
<td></td>
<td>Summer Session Upload to OneDrive</td>
<td><strong>DEADLINE</strong> for Departments to Fill-in Mass Upload Spreadsheet on OneDrive</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>JULY</strong> Mass Upload Sheet</td>
<td>6/21/24</td>
<td>7/5/24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>AUGUST &amp; SEPTEMBER</strong> Mass Upload Sheets</td>
<td>7/19/24</td>
<td>8/2/24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# To-Do List for Faculty & Lecturer Additional Pay

## To-Do List

<table>
<thead>
<tr>
<th>JULY PAY PERIOD</th>
<th>AUGUST PAY PERIOD</th>
<th>SEPTEMBER PAY PERIOD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>8/1/24 PAY DATE</strong></td>
<td><strong>8/30/24 PAY DATE</strong></td>
<td><strong>10/1/24 PAY DATE</strong></td>
</tr>
<tr>
<td>Finish hiring Session 1 Instructors ASAP</td>
<td>Finish hiring Session 2 instructors ASAP</td>
<td>Mass Upload Spreadsheet on OneDrive - <strong>7/19/24</strong></td>
</tr>
<tr>
<td>Mass Upload Spreadsheet on OneDrive - <strong>6/21/24</strong></td>
<td>Mass Upload Spreadsheet on OneDrive - <strong>7/19/24</strong></td>
<td>Fill-in your Spreadsheet by <strong>8/2/24</strong></td>
</tr>
<tr>
<td>Fill-in your Spreadsheet by <strong>7/5/24</strong></td>
<td>Fill-in your Spreadsheet by <strong>8/2/24</strong></td>
<td>Add “DONE” to the file name on OneDrive so I know you are finished.</td>
</tr>
<tr>
<td>Add “DONE” to the file name on OneDrive so I know you are finished.</td>
<td>Add “DONE” to the file name on OneDrive so I know you are finished.</td>
<td>Assign position funding &amp; get COA from other departments as needed.</td>
</tr>
<tr>
<td>Assign position funding &amp; get COA from other departments as needed.</td>
<td>Assign position funding &amp; get COA from other departments as needed.</td>
<td>Assign position funding &amp; get COA from other departments as needed.</td>
</tr>
<tr>
<td>Verify that paychecks look correct.</td>
<td>Verify that paychecks look correct.</td>
<td>Verify that paychecks look correct.</td>
</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-2019
- More details on summer employment can be found on the Collab, 100% Employment During the Summer
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
Choosing the Correct Template

- Full Hire
- Rehire
- Concurrent Hire
- Interlocation Transfer

https://ucsdcollab.atlassian.net/l/cp/6HmP1Nh0
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 first day of classes is 08/07, but we’re using pay periods only in UCPath so the first day on pay would be 08/01

- 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 Mass Upload

- **Graduate Student Employment: Summer Session Pay**
- 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 student, and update funding ahead of submitting your upload request
- **Timing**
  - Positions created, people hired, funding added, Google Forms submitted
  - Due Dates:
    - **Summer Session 1: 07/01**
    - **Summer Session 2: 08/01**
    - **Summer Session 3: Varies** (need at least 10 business days prior to applicable payroll deadline)
Additional Pay Information

- Additional Pay cannot be manually entered in UCPath until the appointment is active.
  - Example, a Summer Session 1 TA appointment is entered into UCPath with a start date of July 1st. The Department cannot manually enter Additional Pay until July 1st or after. Additional Pay cannot be entered until the employee’s start date.

- 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.
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

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

**Initiator Comments:**
See Comment Template (be sure to include comments on Job Data tab as well)
Job Code 002310 Teaching Assistant (TA) at 50%
1st Session (7/3/23 – 8/5/23) - Pay date 8/1/23

<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></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Effective Date

| Effective Date:   | 07/01/2023 |      |

Payment Details

<table>
<thead>
<tr>
<th>Addl Seq #:</th>
<th>1</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date:</td>
<td>07/31/2023</td>
<td></td>
</tr>
<tr>
<td>Pay Period Amt:</td>
<td>$3,788.00</td>
<td></td>
</tr>
<tr>
<td>Goal Amount:</td>
<td>3788</td>
<td></td>
</tr>
<tr>
<td>Goal Balance:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reason: New Additional Pay

Prorate Additional Pay

Applies To Pay Periods

- First
  - Second
  - Third
<table>
<thead>
<tr>
<th><strong>Job Code 001506 Associate-In at 50%</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2nd Session (8/7/23 – 9/9/23) - Pay date 9/1/23</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>New Additional Pay</strong></th>
<th><strong>Employee</strong></th>
<th><strong>Empl ID</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Earnings Code:</em></td>
<td>ASN</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Effective Date</strong></th>
<th>**Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last**</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Effective Date:</em></td>
<td>08/01/2023</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Payment Details</strong></th>
<th>**Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addl Seq #:</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date:</td>
<td>08/31/2023</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Period Amt:</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Goal Amount:</td>
<td>5278</td>
<td></td>
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</tr>
<tr>
<td>Reason:</td>
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<td>Goal Balance:</td>
<td></td>
<td></td>
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<tr>
<td>Prorate Additional Pay</td>
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<table>
<thead>
<tr>
<th><strong>Applies To Pay Periods</strong></th>
<th>**Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last**</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Job Code 002310 Teaching Assistant (TA) at 50%
1st Session (7/3/23 – 8/5/23) - Pay date 8/1/23 & 2nd Session (8/7/23 – 9/9/23) - Pay date 9/1/23

<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><strong>Earnings Code:</strong></td>
<td><strong>ASN</strong></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Additional Comp-Summer-No 403</td>
<td>+</td>
<td>-</td>
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</table>

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Effective Date:</strong></td>
<td><strong>07/01/2023</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payment Details</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addl Seq #:</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>End Date:</strong></td>
<td><strong>08/31/2023</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pay Period Amt:</strong></td>
<td><strong>$3,788.00</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Goal Amount:</strong></td>
<td><strong>7576</strong></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td><strong>Goal Balance:</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Prorate Additional Pay</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Applies To Pay Periods</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Second</strong></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Third</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Transaction Comments Template - Monthly

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Associates-in</th>
</tr>
</thead>
</table>
| **Full Hire /Rehire /Concurrent Hire** | [Hire] effective 07/01/23  
Summer Session I, Associate-In, 50.00% (0.00% FTE, flat-rate paid on Additional Pay)  
Course Dates: 07/03-08/05  
Course Payment: $5,278 (course 3 units or more) |
| **Extend End Date + FTE Change** (Use these comments if you will enter Additional Pay at a later time or submit for mass upload action) | Extend End Date effective [06/30/23] to [07/31/23]  
Change FTE effective [07/01/23] from [50.00%] to 0.00%. |
| **Extend End Date + FTE Change + Additional Pay** | Extend End Date effective [06/30/23] to [07/31/23]  
Change FTE effective [07/01/23] from [50.00%] to 0.00%.  
Additional Pay effective 07/01/23-07/31/23  
Pay Period/Goal Amount: $5,278 |
| **Additional Pay** (Use these comments if you have already extended the end date and changed the FTE at an earlier time OR have already completed a Hire/Rehire/Concurrent Hire action) | Additional Pay effective 07/01/23-07/31/23  
Pay Period/Goal Amount: $5,278 |
### Transaction Comments Template - Hourly

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Reader</th>
<th>Tutor</th>
</tr>
</thead>
</table>
| **Full Hire /Rehire /Concurrent Hire**  | [Hire] effective 07/03/23  
Summer Session I, Reader, 25.00%  
Course Dates: 07/03-08/05 | N/A                                             |
| **Extend End Date + FTE Change**        | Extend End Date effective [06/30/23] to [08/05/23]  
Change FTE effective [07/03/23] from [50.00%] to [25.00%] | N/A                                             |
| **Extend End Date + FTE Change + Additional Pay** | N/A                                                                   | N/A                                             |
| **Additional Pay**                      | N/A                                                                   | N/A                                             |
Experience Based Salary - Associate Instructors

Effective October 1, 2023, Associate Instructors with:

- Six (6) quarters of University teaching experience at UC San Diego
- During Academic Year terms (October 1 - June 30)
  - Fall: 10/1 - 12/31
  - Winter: 1/1 - 3/31
  - Spring: 4/1 - 6/30
- Appointment at 25% FTE or more - only a maximum of one experience count can be earned per quarter
- Who have not advanced to candidacy shall be placed at Salary Point 3
- Who have advanced to candidacy shall be placed at Salary Point 5

Placement on the Salary Scale

- Experience in the Teaching Assistant (Job Code 002310), and Associate Instructor count towards University teaching experience.
- Returning Associate Instructors (students who were appointed as Associate Instructors prior to AY 2023-2024) should be hired at Salary Point 7, regardless of their experience
- Effective Fall 2023, new Associate Instructors may start at Salary Point 1
Experience Based Salary - Teaching Assistants

Effective October 1, 2023, Teaching Assistants with:

- University teaching experience at UC San Diego
  - During Academic Year terms (October 1 - June 30)
    - Fall: 10/1 - 12/31
    - Winter: 1/1 - 3/31
    - Spring: 4/1 - 6/30
  - Summer does not count towards the experience count

- Appointment at 25% FTE or more - only a maximum of one experience count can be earned per quarter

- 3 quarters of experience shall be placed at Salary Point 2
- 6 quarters of experience shall be placed at Salary Point 3

Placement on the Salary Scale

Experience in the Associate Instructor and Associate-in-lieu-of Teaching Assistant (Job Code 001506) count towards University teaching experience.
Experience Based Salary - Associate Instructors

Reference Information for Associate Instructors

On the Collab: Chapter 4: Guide for Associates

In the Contract: Article 32A – General Wages

Reference Information for Teaching Assistants

On the Collab: Chapter 5: Guide for Teaching Assistants

In the Contract: Article 32A – General Wages
Tips for Processing Summer Employment

- 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
**Questions?**

We are happy to help!

<table>
<thead>
<tr>
<th>Summer Session</th>
<th>Academic Personnel</th>
<th>GEPA</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>Dimpie Bhatt</td>
</tr>
<tr>
<td></td>
<td>Heather Zion</td>
<td>(back in August!)</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:hzion@ucsd.edu">hzion@ucsd.edu</a></td>
<td><a href="mailto:grademployment@ucsd.edu">grademployment@ucsd.edu</a></td>
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