Summer Salary

UCR|FOM Academic Process Insert

(AP condensed version)

Policy Owners	**Academic Personnel Office**
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UC RIVERSIDE | Office of Academic Personnel

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1. Overview

In UCPath, several methods will be used to pay summer salary – which includes summer research, summer administrative service, and summer session teaching – for academic appointees. This insert describes the different methods and provides departments with criteria to decide how to transact summer salary actions in UCPath.

For this process to be successful:
- The Academic Appointee must secure summer employment for teaching, research, or service
- The Academic Appointee must communicate details of their summer employment to their AP Partner prior to the month of service
- The AP Partner must determine how to transact summer salary in UCPath, and consult with UCR's APO for necessary guidance or approvals
- The Shared Service Centers (SSC) must process summer salary transactions quickly and accurately

This document is accompanied by a "Transaction Matrix" detailing summer salary (and other academic process) scenarios. Academic processes will be elaborated upon during training.

2. Additional Job vs. Additional Compensation

A. Add summer salary as base compensation (Job Data Compensation tab) on a new or concurrent job if any of the following apply:
   1. Summer research requires payroll certification
   2. The summer appointment is the only job *and* wages must be reported for ACA purposes

B. Add Summer salary as additional compensation on existing job if any of the following apply:
   1. The summer research does not require payroll certification (e.g. administrative ninths, Summer Sessions for Ladder Faculty)
   2. The summer appointment is the only job *but* wages do not need to be reported for ACA purposes
   Note: Additional Compensation should be established on the job where the additional compensation applies. (e.g., if a department chair receives a summer 1/9 for service, the additional compensation should be placed on the department chair 001096 job). The department may, in certain cases, need to add a concurrent job in order to correctly establish additional compensation.
   Best Practice: Additional Compensation should be paid as recurring Additional Pay in order for it to remain on the job for historical purposes.

C. Add summer salary as additional compensation on a new or concurrent job if an MOU requires a specific title for the summer teaching appointment or it is the only job

3. Roles and Responsibilities

Organization/Department

Role	Description
Academic Appointee	• Secures summer appointment or summer salary for research or service • Informs AP Partner of plans for summer salary
AP Partner/AP Staff Member	• Communicates with academic appointee about summer employment plans • Obtains approvals or guidance from department ORG and/or UCR APO, as necessary • Initiates necessary onboarding, additional compensation, and/or PayPath transactions to properly establish summer salary, using ServiceLink

Central Office

Role	Description

APO Admin	• Provides AP Partner/Staff Member and SSC with:
	  • Policy guidance
	  • Best practices for entry and transactions
	  • Approvals, as necessary
	  • Compliance
	  • Ensures UCR Guidelines are in alignment with UC Academic Affairs System-wide guidelines
	  • Works with UCPC for escalated issues
	  • UCPC liaison for Academic Appointees
	  • Audit of 3/9 maximum

UCR Shared Service Center (SSC)

Role	Description
SSC Admin	• Receives initiated transactions from AP Partner/Staff Member through ServiceLink • Initiates transactions in UCPath • Consults with AP Partner/Staff Member as necessary to complete transactions • Adheres to Central Office policy and guidelines
SSC Manager	• Serves as AWE approver for UCPath transactions

UCPath Center (UCPC)

Role	Description
UCPC Admin	• Finalizes transactions for new hire templates in UCPath • Loads I-618 files and distributes error reports to SSC via payroll office

Role	Description
	• Does not review or otherwise monitor PayPath transactions

4. Getting Started

Step	Task & Role(s) Involved	Procedure	Standards and Best Practices	Notes and Considerations
1	Appointee secures summer appointment for teaching, research or administrative service under the parameters established in the APM.	• Appointees should consult UCR's annual Summer Salary Guidelines for key dates and requirements. • After securing summer employment, the appointee should contact their AP Partner/Staff Member to inform them of their arrangements prior to the month of service.	N/A	N/A
2	The AP Partner/Staff Member analyzes each appointee's summer employment plans and determines the proper way to enter summer salary into UCPath.	• **If summer salary should be established as <u>base</u> compensation on a new or concurrent job,** see section 5. • **If summer salary should be established as <u>additional</u> compensation on an <u>existing job</u>,** see section 6. • **If summer salary should be established as <u>additional</u> compensation on a <u>new or concurrent job</u>,** see section 7.	For grants requiring payroll certification using the researcher 1/9 job code. For grants which do not require payroll certification and/or for Admin duties and Summer Sessions teaching for ladder rank faculty. Continuing Lecturer teaching in Summer Sessions or an employee's only job not subject to ACA reporting.	N/A

5. Establishing Summer Salary as Base Compensation on a New or Concurrent Job

Step	Task & Role(s) Involved	Procedure	Standards and Best Practices	Notes and Considerations
1	AP Partner/Staff Member initiates Onboarding transaction to add a new or concurrent job.	• Using the standard **Onboarding** process, the AP Partner/Staff Member establishes a new or concurrent job using the appropriate job code. • Compensation should be established as "base compensation" using the correct	**Best Practice:** New or concurrent jobs established to pay summer salary should be set to terminate automatically at the end of the summer (the "End Job Automatically" box	Before initiating the Onboarding transaction, the AP Partner/Staff Member should ensure a Position has been correctly established. If not, the AP Partner/Staff Member should create or modify a position

5. Establishing Summer Salary as Base Compensation on a New or Concurrent Job

Step	Task & Role(s) Involved	Procedure	Standards and Best Practices	Notes and Considerations
		compensation rate code and compensation rate. • The compensation rate should be equal to the appointee's annual salary rate, and the FTE should be adjusted to pay the appointee correctly for the number of working days in the first month of summer employment.	should be checked). If appropriate, the appointee can be rehired into the same job each year. **Best Practice:** The Position used to pay summer salary should be established with 1.0 FTE and have the "Include FTE" box **unchecked**. This will allow the FTE on the job to be adjusted.	using the **Position Management** process. Before Onboarding the appointee into the new or concurrent job, the AP Partner/Staff Member should ensure funding is correctly established on the position and use the **FAU Change Request** to make any necessary changes.
2	**If the appointee will work different numbers of days during each month of summer,** the AP Partner/Staff Member initiates one or more PayPath transactions to adjust the appointee's FTE on the Job record.	• To ensure the appointee is paid correctly during each month of summer *and* to ensure effort is recorded accurately, the appointee's FTE may need to be adjusted per the number of working days in each month. • The UCR Summer Salary Guidelines outline the appropriate FTE for the number of working days in each month. For example, if the employee plans to work 23 days in a month, s/he would need two concurrent researcher positions totaling 1.2105 combined FTE since the maximum FTE per job is 1.0. **Note:** The compensation rate should always equal the appointee's annual salary. Be sure the "Include FTE" box is **unchecked** in order to unlink FTE on each concurrent job.	**Standard:** Per APM 600 Appendix 1, total summer salary may not exceed 1/3 of the appointee's annual salary rate (for academic year appointees) or 1/11 – 1/12 of the appointee's annual salary rate (for fiscal year appointees). Using the monitoring report, the AP Partner/Staff Member should ensure the appointee's summer salary does not exceed this limit. Central APO and UCPC will be auditing the 3/9 limit and will address any issues as appropriate.	Once the concurrent job(s) has been Onboarded, the AP Partner/Staff Member may submit multiple PayPath transactions ensuring the effective date for each FTE change is correct.
3	The AP Partner/Staff Member ensures the concurrent job is Offboarded at the end of the summer period.	• If the "End Job Automatically" box is not checked at the time of Onboarding, the AP Partner/Staff Member would need to	**Best Practice:** Always check the "End Job Automatically" box at the time of Onboarding.	To ensure the appointee's concurrent job is Offboarded automatically at the end of the summer period, the AP Partner/Staff

5. Establishing Summer Salary as Base Compensation on a New or Concurrent Job

Step	Task & Role(s) Involved	Procedure	Standards and Best Practices	Notes and Considerations
		Offboard the concurrent job(s) at the end of the summer.	Job will be terminated by an automatic process on the night of the Job Expected End date.	Member should select this in the Onboarding request.

6. Establishing Summer Salary as Additional Compensation on an Existing Job

Step	Task & Role(s) Involved	Procedure	Standards and Best Practices	Notes and Considerations
1	AP Partner/Staff Member initiates transaction(s) to add Recurring Additional Compensation on the employee's existing job.	• Using the **PY.01 – Additional Compensation Process**, the AP Partner/Staff Member initiates Recurring Additional Compensation request using the correct earnings code and earnings amount. • For Recurring Additional Compensation, the earnings amount should be equal to the amount the employee should be paid in each month. To determine this, the AP Partner/Staff Member should refer to the UCR Summer Salary Guidelines.	**Best Practice:** If the AP Partner/Staff Member knows the amounts the appointee is owed each month, all Additional Compensation for the summer period should be entered at once, in either one transaction or multiple transactions. This will help ensure no payments are skipped and Additional Compensation ends correctly at the end of the summer period.	Recurring Additional Compensation will ensure the transaction will become part of the employee's history as it remains on the Job. Even if summer salary will be for a single month, it is best to add as Recurring Additional Compensation.
2	AP Partner/Staff Member ensures FAU distribution for the appointee's primary job is correct.	• AP Partner/Staff Member analyzes FAU distribution for the appointee's existing position, and ensures it is correct. • **If changes must be made,** the AP Partner/Staff Member uses the **FAU Change Request** tool to update the FAU distribution or contacts their fund manager to request an FAU change be processed.	**Standard:** FAU distribution lines for specific earnings codes should only be entered if the funding source for summer salary differs from the appointee's standard funding source (e.g., if the appointee obtains an extramural grant during the summer, the funding may need to be changed).	

Step	Task & Role(s) Involved	Procedure	Standards and Best Practices	Notes and Considerations
1	AP Partner/Staff Member initiates Onboarding transaction to add a new or concurrent job.	• Using the standard **Onboarding** process, the AP Partner/Staff Member establishes a new or concurrent job using the appropriate job code. • No base compensation should be established on the new or concurrent job. Do not use UCWOS, otherwise additional pay will be not allowed. • **If the employee's summer salary should be established as Recurring Additional Compensation,** the AP Partner/Staff Member adds the Recurring Additional Compensation during the Onboarding process *OR* through a subsequent **PY.01 – Additional Compensation** transaction. • For Recurring Additional Compensation, the earnings amount should be equal to the amount the employee should be paid in each month. To determine this, the AP Partner/Staff Member should refer to the UCR Summer Salary Guidelines.	N/A	Recurring Additional Compensation may be established as part of the Onboarding process. If it is not established during the Onboarding transaction it cannot be processed in UCPath until after the Onboarding transaction has been finalized.
2	**If summer salary should be paid as One Time Pay or if Recurring Additional Compensation could not be established at the time of Onboarding,** the AP Partner/Staff Member submits One Time or Recurring Additional Pay transactions to the UCR SSC.	• The AP Partner/Staff Member establishes One Time payments or Recurring Additional Compensation using the **PY.01 – Additional Compensation** process after the Onboarding transaction has been finalized by the UCPath Center. • For both Recurring Additional Compensation and One Time Pay, the earnings amount should be equal to the amount the employee should be paid in each month. To determine this, the AP	**Best Practice:** Recurring Additional Pay should be used for senate faculty. **Best Practice:** One Time Pay should be used for non-senate faculty Summer Session Payments.	N/A

7. Establishing Summer Salary as Additional Compensation on a New or Concurrent Job

Step	Task & Role(s) Involved	Procedure	Standards and Best Practices	Notes and Considerations
		Partner/Staff Member should refer to the UCR Summer Salary Guidelines.		

8. Reports

Report /Tool	Description	Source	Type	Party of Interest	Run Frequency
HRDW ad hoc Reports	Queries may be run in HRDW to retrieve Summer Salary data for AY and FY appointees per your accountability structure. Additional fields are being added to mitigate any missing fields. Status updates are forthcoming.	HRDW	Operational	UCPC, Central Office, Shared Service Centers, ORG, department	As needed
Custom Report Request (Interim Process)	Custom report request may be sent to APUCPathsupport@	AP Project Team	Operational		
3/9 Auditing Report	Assists the UCPC and locations audit academic appointees with summer salary, to ensure appointees do not exceed the 3/9 limit.	UCPath	Operational	UCPC; Locations	Forthcoming