

To: Department Chairs, Directors, Business Officers and all faculty

From: Cindy Doherty, Director  
Academic Personnel

Re: Academic Personnel resource updates

A number of resources have been recently updated on the Academic Personnel website.

Technical changes to Red Binder sections. Please note that technical changes are not changes of campus policy, rather they reflect mandated changes due to system-wide or external policy or regulations. As such, these changes did not undergo the campus-wide review required for policy changes. Annotated versions highlighting the changes are also posted.

- **Red Binder I-20: Removal Expenses.** Encourages new appointees to consult with their tax advisor regarding implications of taxation of removal expenses due to recent IRS changes.
- **Red Binder VI-10: Additional Compensation:** Reflects changes in transactional processing for summer research compensation in the payroll system due to UCPath capabilities. Updates to reflect summer 2018 pay and service dates.

Annual updates to charts and templates.

- Pay and Service Period Chart (2018-19 dates)
- Graduate Student Maximum Employment Chart (2018-19 dates)
- Template letters for graduate student employment

All documents are available on the Academic Personnel web-site at <https://ap.ucsb.edu/>

I-20  
**REMOVAL EXPENSES**  
(Revised 09/13)

Removal expenses may be provided for certain new appointees to academic positions (APM 560-14). For those eligible, removal expenses are paid *and taxed* in accordance with University and IRS regulations. *New appointees are encouraged to consult with their tax advisor regarding the impact of removal reimbursement.* Any exceptions to policy, including full removal expenses, must be requested at the time of appointment.

UC Policy (one-half of the total cost)

University policy allows for coverage of one-half of the total eligible costs associated with a single move from one physical location, including the following:

1. Packing, freight and insurance of normal household goods (see definition below), when properly supported by invoices and/or receipts, in accord with Section V of UC Policy BFB-G-13: Policy and Regulations Governing Moving and Relocation.
2. Air coach transportation for the appointee and members of the household or an equivalent amount for other travel in accordance with standard airline fare policies and University travel regulation.
3. Meals en route for the appointee and members of the household in accordance with University travel regulations. If travel is by automobile, the cost of meals is an allowable expense only to the extent that might have been necessary if travel had been by air coach.

An appointee may have the total cost of removal of his/her personal library covered, but only if the library is to be made generally available to students and faculty; otherwise coverage is one-half of the total cost. It will be necessary for the involved appointee to secure from his/her moving company a breakout of the shipping costs for the portion of the shipment that is for library-related materials. Without this estimate, only 50% coverage will be allowed.

Household goods include: personal property such as furniture, clothing, musical instruments, household appliances, and other items which are usual and necessary for the maintenance of a household.

Full Removal

An exception to allow for full removal coverage may be requested by the Department at the time the start-up commitment is request. If full removal is provided, all reasonable removal costs will be covered for a single move, in accord with UC Policy BFB-G-13: Policy and Regulations Governing Moving and Relocation and subject to the following conditions.

Appointees receiving 100% removal will have travel for themselves and members of the household made on the lesser of one-way coach fare, or actual expenses (airfare or mileage reimbursement, lodging, and meals en route) at UC allowable rates per G-28, Policy & Regulations Governing Travel and G-13, Policy & Regulations Governing Moving and Relocation. Receipts will be required. If, for personal reasons, an indirect route is traveled or the trip is extended, coverage shall be based only on such charges as would have been incurred by the usually traveled route. All appointees must purchase the least expensive air tickets to the Santa Barbara area.

Prospective employees should be aware that costs for the following cannot be covered:

- transport of trailers, boats, other motorized recreational vehicles, or more than two motor vehicles
- transport of belongings related to commercial enterprises engaged in by the employee
- transport of building materials
- transport of animals other than household pets
- assembly and disassembly of unusual items such as, but not limited to, satellite dishes, storage sheds or pool tables.

- Canned, frozen or bulk foodstuff.
- Plants

Advance approval will be required for coverage of costs associated with a move from more than one physical location (a staged move) or any other exception to policy. Coverage under such exceptions may be considered taxable income.

VI-10  
ADDITIONAL COMPENSATION  
 (Revised 5/17)

**General Policies**

Reference: APM 660

Additional compensation is any compensation, paid to an academic appointee by the University in excess of their full-time salary. The term "University" includes all campuses within the UC system. The term "additional compensation" refers only to compensation paid through the University payroll system and is not used to refer to compensation for employment outside of the University.

Additional compensation during the Summer quarter is allowed for academic appointees paid on a 9/12 basis. This is possible because the individual works for the University from September through June, but receives 12 paychecks spread over the year. If they do additional work for the University during the Summer, they can be paid additional money. They will continue to receive their regular pay as well as the additional compensation. All ladder rank faculty, as well as those in the Visiting Professors, Adjunct Professors, and Lecturer SOE series are eligible to earn additional compensation. Non-Senate faculty (Lecturer, Supervisor of Teacher Education, etc.) may also earn additional compensation subject to Article 37 of the Memorandum of Understanding. Additional compensation payments for research activities are made at the 1/9th rate based on the annual salary at the time of the activity. Additional Compensation payments for Summer Session teaching are made on a flat rate basis. The total additional compensation during the summer may not exceed the equivalent of **3/9ths of the faculty member's annual salary.**

Additional compensation during the academic year is allowed only for duties not directly related to the individual's recognized University duties. Examples of this include department chair stipends, Extension teaching, lectures given on other UC campuses and faculty consulting.

Additional compensation for fiscal year academic employees is generally not allowed, with the exception of some types of honoraria and Summer Session teaching.

Red Binder VI-14 and VI-17 provide further detail regarding specific types of additional compensation.

Other than the specific types of service covered by policy and applicable bargaining agreements, Academic appointees may not be employed beyond 100%.

Additional compensation for the summer period is calculated using the "Daily Factors 19-day Chart (Red Binder VI-12). The chart is used to determine the percentage of time and effort equivalent to the number of summer days worked. Each day during the summer can only be used once and the total percent time for each day may not exceed 100%.

Summer additional compensation may only be **paid earned** during the designated summer period. This is the time period from the day following the last day of final exams in the spring, through the last day before classes start in the fall. The dates represent the available days in each month of the summer period. This information will be updated on an annual basis. **Actual days to be used will be representative of the dates of service. For transactional purposes the service days are converted to a percentage spread over the coinciding pay period. Because available service dates may exceed 19 in a given month, service days beyond 19 in a month may be paid on a secondary position/job up to the maximum allowable percentage of time in the service month.**

Dates for 2017 Additional compensation

Dates for 2018 Additional compensation

<u>Month</u>	<u>Number Of Days</u>	<u>Percent time</u>	<u>Pay Dates</u>	<u>Service Dates</u>	<u>Max Days</u>	<u>Max % time</u>
June 19-30	10	.5263	June 1-30	June 18-30	10	.5263
July 1-31	21	1.1053	July 1-31	July 1-31	22	1.1579
Aug. 1-31	23	1.2105	Aug. 1-31	Aug. 1-31	23	1.2105
Sept. 1-12	16	.8421	Sept.1-30	Sept. 1-21	15	.7895