

Course-Buy Out & Extramurally Funded Research

Overview:

Faculty members with access to external fund sources may receive approval to reduce their teaching commitment through a course buy-out/release to grant in order to spend more time on research. The release to grant may be approved for single or multiple quarters. Faculty approved for release to grant substitute funds from external sources, such as contracts and grants, for the General Funds that usually support their pay. The method used depends upon whether funding will replace the salary at a rate above or below 50%.

Important things to note:

- Eligibility limited to Senate Faculty who are typically paid 100% under state funds (19900)
- Release to grant: grant funds used in place of a portion, or all, of the regular state funded salary for a limited amount of time
- Course Buy-Out: a type of release to grant where the portion of FTE corresponds to the faculty member's reduced teaching load, and pay periods correspond to quarter(s) being bought out
- Contact the Dean's Office for approval/proper procedure

Process:

1. Follow the Dean's approval process
2. Follow the directions below according to the appropriate method (**<=50%** or **>50%**).

Method 1: The Release to Grant 50% or less

Change the fund source for the existing faculty position

Department Action

- Reduce the **Pay Dist %** of the faculty's 19900 fund
- Enter the new sponsored funding source with the corresponding **Pay Dist %**
- Ensure the total **Pay Dist %** between all fund sources totals equals 100%
- On the UCPATH Help site see [Enter Position Funding Update](#) for additional guidance on Fund Entry transactions
- At the end of the release period, end the sponsored funding source and increase the faculty's 19900 fund **Pay Dist %** back to 100%

Funding Entry

Request ID: NEW
Set ID: MECMP Department: E25300 Earth Systems Science Request Status: In Progress
Fiscal Year: 2019 Budget Begin Date: 07/01/2018 Budget End Date: 06/30/2019

Level: Department Position Pool Position
Position Number: 40002621 PROF-AY Pool ID:

Job Data Snapshot

Name	Empl ID	Empl Rcd	Effective Date	Eff Seq	Department	Job Code	Job Code Descr	Payroll Status	Expected Job End Date	e-Verify
1 Ishac, Yelena M	10004085		07/01/2018	0	E25300	001100	PROF-AY	Active		

*Funding Effective: 07/01/2019 Eff Seq: 0 *Status: Active Record Status: In Progress

Earnings Distribution

Em Cd	Seq #	Combo Code	Location	Account/CC	FS Dept	Fund	Project	Sub Override	GL Bus Unit	OTC Indicator	Funding End Date	Pay Dist %
1	1	000009575	0	4025103A	E253	19900			MCFIN			55.000
2			0	4025103A	E253	05397			MCFIN			45.000

Justification document: Add Attachment View Attachment Delete Attachment Budget Distribution Details Salary Cap / MCOP Funding Worksheet

Method 2: The Release to Grant is Greater than 50%

1 Department Action:

- Submit a **UCPath Certification Request** via AP Folio completing the “Release to Grant” section to request a new Research position:
 - Determine the appropriate research title code, based on the employee’s existing job code (*Review the Extramurally Funding Research – Payroll Matters slides in the [AP Additional Comp Training PDF on AP Training Materials Page](#). Questions regarding job codes should be sent to the AP Policy analyst*)
 - Enter the start and end dates of the release. If this is a course buy-out, the dates must correspond to 9/12 pay periods
 - Enter the following details in the **Comment** section:

Employee ID: #####
Course Buy Out [or Release to Grant]
Position Number: <i>Provide number if reusing, otherwise a new one will be created.</i>
Dept: (Ex: ICBT)
Effective Dates: (Ex: 11/1/2022-6/30/2023)
FTE: (Ex: 60%)
The following professorial position will be updated.
Professorial Position
Position Number: (Ex: 40888888)
Dept: (Ex: RELG)
Effective Dates: (Ex: 11/1/2022-6/30/2023)
FTE: (Ex: 40%)
Revert FTE back to: (Ex: 100% on 7/1/2023)

2 AP-Path Team Action:

- The AP-Path Team will email the department with the course buy-out confirmation email
- A **PayPath** Action will be submitted to reduce the FTE on the professorial position

3 Department Action:

- Upon receipt of the course buy-out confirmation email from the AP-Path team:
 - Validate position data points are correct
 - Enter funding on position
 - Validate that the changes made to the professorial position are correct in **Job Data**
 - Initiate **Concurrent Hire Template Transaction – Academic**; select the **End Job Automatically** check box

Work Location - Expected Job End Date	
Expected Job End Date	<input type="text" value="12/27/2019"/> <input type="button" value="B"/>
<input checked="" type="checkbox"/> End Job Automatically	

4 AP-Path Team Action:

- Once the course buy-out is complete, the FTE will be returned to 100% via **PayPath**

5 Department Action:

- Validate **Job Data** and **Review Paycheck Summary** are correct after course buy-out is complete
- Email AP Path Team if any issues are identified

Common Roadblocks

Email AP-Path Team for guidance and troubleshooting.

- Extending course buyout on an active or inactive appointment
- FTE changed or was incorrectly set-up
- Submit a BFS ServiceNow ticket for a retro course-buyout, when needed:
 - When the release is greater than 50% and the Hire/FTE changes are not applied prior to the start of the release dates to initiate a missed-/over-payment ticket
 - When the release is less than 50% and the fund entry was processed after the start of the release dates to process a salary cost transfer.

References

UCPath Job Aid: Course Buy-Outs – Note: The UCSB Processes above supersede the UCPath process job aid linked.

<https://sp.ucop.edu/sites/ucpathhelp/LocationUsers/LOCplayer/index.html?Guid=2d90ee5d-5cef-441a-9cb1-30dd30a5ec81>

Additional Compensation Slides: <https://ap.ucsb.edu/training.and.workshops/staff.training.materials/>