Additional Compensation

April 16, 2020
Office of Academic Personnel

**Joanie Vogel**  
× 3445  
joanievogel@ucsb.edu  
Intercampus payments

**Lia Cabello**  
× 5979  
lia.cabello@ucsb.edu  
Social Sciences, CCS, Academic Programs, Education, HFA

**Helly Kwee**  
× 5428  
helly.kwee@ucsb.edu  
MLPS, Bren, Library, Engineering

**Tamara Berton**  
× 5429  
tamara.berton@ucsb.edu  
UC Path Manager

**June Betancourt**  
× 5728  
June.Betancourt@ucsb.edu  
Associate Director
Other Resources

▪ Academic Personnel website
  – https://ap.ucsb.edu/
  – Frequently Asked Questions (FAQs)
    ▪ Additional Compensation

▪ Red Binder
  – Sections VI 10-17

▪ APM 600
Agenda

- What is additional compensation?
- Compensation from outside the University
- Additional compensation during the Academic Year
- Additional compensation during the Summer
- UCPath considerations
- Helpful hints/Best Practices
- Quiz
What is Additional Compensation?

- APM 600, RB VI-10
- Any salary paid to an academic appointee by the University in excess of their full-time salary
- **During the academic year:** only for duties not directly related to the employee’s recognized University duties. Limits vary depending on type of payment and academic appointment held
- **During the summer quarter:** allowed for an academic employee paid on a 9/12 basis. Maximum of 3/9ths per summer. Some may be restricted due to appointment type
- Can be paid even if a person is on leave without salary
Activities outside UC

▪ APM 025, RB I-29

▪ Conflict of Commitment and Outside Professional Activities

▪ All senate faculty must report, whether compensated or uncompensated

▪ 39 day limit for Categories I and II during academic year
  – 1 day/week during summer when drawing summer salary through UCSB

▪ Categories:
  – I: Appear to be conflict; Prior approval required. Must report
  – II: Unlikely to be a conflict. Must report
  – III: No conflict. Allowed, not reported

▪ Not additional compensation

▪ Reported in OATS (Online Activity Tracking System)
Additional Comp during the Academic Year

- University Extension teaching
- Faculty consultant services
- Lectures and similar services
- Honorarium
- Housing allowance
- Extramural Funding
- Administrative stipends
University Extension teaching

- APM 662, appendix B-1; RB VI-17
- Teaching beyond the regular assigned teaching load that takes place through the Extension
  - During AY: counts towards the 39 day limit. A day = “6 contact or podium hours”
  - During summer: counts towards the 3/9ths limit
- Earn code ACX for individuals who only teach through Extension
- Earn code UNX for current faculty who are teaching as additional compensation
- Job code 3570: University Extension Teacher
- Input done by Extension
Faculty Consultant Services

- APM 664; RB VI-17
- Consulting or participation in projects that do not fall within the normal duties of the individual
- Rate is negotiated. Limited to daily rate plus 30%
- Daily Rate:
  - 9 month employees, annual salary divided by 171
  - 11 month employees, annual salary divided by 236
- Allowed during both the academic year and the summer months
- Counts toward the 3/9ths maximum during summer
Faculty Consultant Example

- Professor Danvers is an Associate Professor II w/ annual salary of $80,000
- She will provide consulting services for a fee of $1000 in August
- How many days does this entail?
  - $80,000 / 171 = 467.84 + 30% → $608.19 per day
  - $1,000 / $608.19 = 1.6 days
Faculty Consultant (UC Path request)

- UC Path Certification & Input Request form on AP Folio
- Select “Faculty Consultant” under One-Time Additional Pay
- Enter Start and End Dates in accordance with # of days as computed by daily rate (previous slide)
- Enter Fund Source
- Comments:
  - Explanation/justification
  - Any additional/background information pertinent to the request
- Observe AP’s payroll submission deadline
Honorarium

- APM 666; RB VI-17
- Academic employees may receive honoraria for:
  - Work related to University-sponsored conferences
  - Creative work unrelated to primary job responsibilities
- Honoraria may **not** be paid using State funds (19900)
- Up to $2,500 per event (up to $5,000 by exception)
- During AY: Total annual amount earned may not exceed 10% of the annual base salary
- During summer: Counts towards 3/9th limit for lectures/similar services
- If work performed on home campus, administer through payroll system
- If work performed at host campus, via intercampus form originating at host campus
Honorarium (UC Path request)

- UC Path Certification & Input Request form on AP Folio
- Select “Honoraria” under One-Time Additional Pay
- Enter Start and End Dates that reflect when work was actually performed
- Enter Fund Source
- Comments:
  - Explanation/justification
  - Any additional/background information pertinent to the request
- Observe AP’s payroll submission deadline
Housing Allowance

- aka Faculty Recruitment Allowance
- Academic Senate only
- Provided as part of start-up package for rental deposit or down payment on home purchase
- Does not count as additional compensation
- See Table 40 on Salary Scales page for current amount
Housing Allowance (request)

- UC Path Certification & Input Request form on AP Folio
- Select “Recruitment Allowance” under One-Time Additional Pay
- Enter Fund Source
- Comments:
  - Any additional/background information pertinent to the request
  - Date/pay cycle payment should be disbursed
- Observe AP’s payroll submission deadline
- Can be done off-cycle. If time-sensitive, call the AP-Path team after submitting form!
UCPath Cert Form: Example

Action
- One-Time Additional Pay
- Recruitment Allowance
- Faculty Consultant
- Honoraria
- Extension or Executive Program Compensation
- Other

Dollar Amount: 1000.00

Start Date: 07/01/2020

End Date: 07/03/2020

Fund Source: 0 166021 19900 0

Comments: Professor Smith of FRIT will work with the History department to translate historical documents from French to English
Intercampus payments

- APM 666; RB VI-15
- Any work done on another UC campus, for example:
  - Lectures, creative work, or consultant services
  - Teaching a class for a quarter or longer
- Payments during the summer count toward the 3/9th limit
- Payments are made using a one-time intercampus payment form or multicampus appointment form
“Intercampus one-time payment form” vs. “multi-campus appointment form”

▪ Both of these forms are used for processing payments for academic employees who are employed on one UC campus but performing services for pay on a second UC campus

▪ The One-time payment form is used for short term events. The Multi-campus payment form is used for ongoing activity, such as teaching a class for a full quarter

▪ All forms are routed through Academic Personnel

▪ Fillable forms are found on the AP website under ‘Forms’

▪ https://ap.ucsb.edu/forms/
Intercampus One-time form UPAY 644C-T
# Temporary Intercampus or Multi-Campus Appointment Form

<table>
<thead>
<tr>
<th>Temporary Intercampus or Multi-Campus Appointment Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home Campus:</strong></td>
</tr>
<tr>
<td><strong>Home Department:</strong></td>
</tr>
<tr>
<td><strong>Home School:</strong></td>
</tr>
<tr>
<td><strong>Host Campus:</strong></td>
</tr>
<tr>
<td><strong>Host Department:</strong></td>
</tr>
<tr>
<td><strong>Host School:</strong></td>
</tr>
</tbody>
</table>

## Temporary Intercampus or Multicampus Appointment Form

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID Number</th>
<th>Title Code</th>
<th>Step/Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary (Annual)</td>
<td>Salary (Monthly)</td>
<td>☐ 09/09</td>
<td>☐ 09/12</td>
</tr>
<tr>
<td>Current Appointment Dates</td>
<td>to</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Host Campus Information

<table>
<thead>
<tr>
<th>Host Campus Temporary or Multicampus Appointment</th>
<th>Title Code</th>
<th>Step/Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary (Annual)</td>
<td>Salary (Monthly)</td>
<td>☐ 09/09</td>
</tr>
<tr>
<td>Pay Period Dates</td>
<td>to</td>
<td></td>
</tr>
<tr>
<td>Description of Service (DOS) Code (For example: REG, Regular; BYA, By Agreement, etc.):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Host Campus Fund Source to be Charged</td>
<td>Account Name</td>
<td>Dist %</td>
</tr>
<tr>
<td>Location</td>
<td>Account</td>
<td>Cost Center</td>
</tr>
</tbody>
</table>

## Reason for Appointment

Please Note: Additional employment may affect existing benefits.

## Approvals

<table>
<thead>
<tr>
<th>Host Campus Fund Source Authorization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host Campus Dean’s Office/Academic Personnel</td>
</tr>
<tr>
<td>Home Campus Dean’s Office/Academic Personnel</td>
</tr>
</tbody>
</table>

RETNC: Pending

cc: EMPLOYEES HOME DEPARTMENT
“Intercampus one-time payment form” vs. “multi-campus appointment form” cont.

- One-time payment form requires dollar amount
- Multi-campus form requires current home appointment dates as well as host appointment dates
- Both forms require employee home appointment information, fund source information, earn code, and authorization from home and host campus
- Both forms benefit from supporting documentation about the work being done
Intercampus Payment Forms – where do they go?

**If we are the Host campus**
- Dept contacts home campus for info on the home campus appt. Ensure fund source is authorized for payment. Prepare and send Intercampus Payment form to UCSB AP office
- UCSB AP office will review form and forward to the home campus AP office
- Host school’s home department will sign form and forward to UCSB AP for payment

**If we are the Home campus**
- Department assists host campus in completing form by supplying info as requested
- Host campus obtains approvals for necessary form(s)
- Host campus processes payroll action to issue payment
# Intercampus Payment—payroll considerations

<table>
<thead>
<tr>
<th>Both Home and Host campuses on UC Path</th>
<th>Process one-time payment form to ensure there are no conflicts. Host campus: create position/job, job code 1650, with zero comp rate and one-time additional pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home campus on UC Path; Host campus on PPS</td>
<td>Process one-time payment form to ensure there are no conflicts. Home campus: create position/job, job code 1650, with zero comp rate, one-time additional pay, Accounting as the home department, suspense account used as funding source.</td>
</tr>
<tr>
<td>Home campus on PPS; Host campus on UC Path</td>
<td>Process one-time payment form to ensure there are no conflicts. Home campus issues one-time pay. Accounting journals the expense to the host campus</td>
</tr>
</tbody>
</table>
Administrative Stipends

▪ RB VI-17
▪ Department Chairs and Unit Directors.
▪ Approved on an annual basis by the Executive Vice Chancellor or Vice Chancellor for Research
▪ Payroll input will be done centrally by AP
▪ Deans are Faculty Administrators but are NOT paid a separate stipend
Extramurally Funded Research during AY

- RB VI-14
- Senate Faculty only
- **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**: same, but the portion (% time) corresponds to the faculty member’s teaching load reduced, and pay period corresponds to quarter being bought out
- NOT additional compensation!
- Contact Dean’s office for approval/proper procedure
Extramurally Funded Research—payroll matters

- Grant-funded portion must be under corresponding Researcher title (NOT faculty title) below
- Must reduce faculty title % time accordingly
- Pay basis remains at 9/12

<table>
<thead>
<tr>
<th></th>
<th>General</th>
<th>Engineering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistant Researcher</td>
<td>3223</td>
<td>1985</td>
</tr>
<tr>
<td>Associate Researcher</td>
<td>3213</td>
<td>1983</td>
</tr>
<tr>
<td>Researcher</td>
<td>3203</td>
<td>1981</td>
</tr>
</tbody>
</table>
Release to Grant/Course Buyout (UC Path request)

- UC Path Certification & Input Request form on AP Folio
- “Release to Grant” section
- Job Code: corresponding Researcher title code (previous slide)
- Start/End dates: correspond to 9/12 pay period
- Earn code: REG
- Be aware that this process takes longer to fulfill (earlier deadlines may apply)
Release to Grant/Course Buyout example

- Professor Barnes is a Full Professor in Mechanical Engineering and wants release to extramural grant funds
- He does this as course buyout for Fall quarter 2020
- Department standard teaching load = 4 courses/year, so one course corresponds to 37.5% of his salary
- For Fall quarter (7/1 – 10/31):
  - Reduce Professorial appointment to 62.5%
  - Add 9/12 Researcher appointment at 37.5%
- Return Professorial appointment to 100% for Winter quarter and beyond
Form Example

**Release To Grant**

**Start Date:** 07/01/2020

**End Date:** 10/31/2020

**Department for Release Position:** MCDB

**Job Code for Release Position:** 1981

**Percent Time / FTE of Release:** 37.5

**Comments:** Course buyout during Fall 2020
Timeline Considerations—flow of events

1) AP sets up appropriate Researcher position
2) Department funds position
3) Department performs concurrent hire into this new position
   - “Job End Date” and “End Job Automatically” checkbox fields are filled in
4) AP approves the concurrent hire transaction; UCPC fulfills the hire
5) Once the hire is fulfilled by UCPC, AP then reduces faculty appointment
   - Faculty job is set to return to regular FTE upon end of Release to Grant
Additional Compensation During the Summer

- Summer Session teaching
- Dates, Calendars and Charts
- Summer Salary Scenarios
- UC Path Procedure
Summer Session Teaching

- APM 661-14; RB VI-17
- Payments count towards the 3/9ths max that may be earned during summer
- Payments are figured on the 6/30 pay rate, paid as flat amount based on Summer Session formula
- Earn code ACS or ASN, depending on DCP contribution status
- Paid on the MO pay day (schedule available on Summer Session web site)
- Summer Session and AP will do payroll processing centrally
- Contact: Anne Croff  x7207  a.croff@summer.ucsb.edu
## Available Dates for 2020 Summer Salary

<table>
<thead>
<tr>
<th>Pay Dates</th>
<th>Service Dates</th>
<th>Max Days</th>
<th>Max % time</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 1 - 30</td>
<td>June 13-30</td>
<td>12</td>
<td>0.6316</td>
</tr>
<tr>
<td>July 1 - 31</td>
<td>July 1-31</td>
<td>23</td>
<td>1.2105</td>
</tr>
<tr>
<td>Aug 1-31</td>
<td>Aug 1-31</td>
<td>21</td>
<td>1.1053</td>
</tr>
<tr>
<td>Sep 1 - 30</td>
<td>Sep 1-26</td>
<td>19</td>
<td>1.0000</td>
</tr>
</tbody>
</table>

*(See RB VI-10)*
# 19-Day Chart (RB VI-12)

<table>
<thead>
<tr>
<th># working days used</th>
<th>Dist %</th>
<th># working days used</th>
<th>Dist %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0.0526</td>
<td>13</td>
<td>0.6842</td>
</tr>
<tr>
<td>2</td>
<td>0.1053</td>
<td>14</td>
<td>0.7368</td>
</tr>
<tr>
<td>3</td>
<td>0.1579</td>
<td>15</td>
<td>0.7895</td>
</tr>
<tr>
<td>4</td>
<td>0.2105</td>
<td>16</td>
<td>0.8421</td>
</tr>
<tr>
<td>5</td>
<td>0.2632</td>
<td>17</td>
<td>0.8947</td>
</tr>
<tr>
<td>6</td>
<td>0.3158</td>
<td>18</td>
<td>0.9474</td>
</tr>
<tr>
<td>7</td>
<td>0.3684</td>
<td>19</td>
<td>1.000</td>
</tr>
<tr>
<td>8</td>
<td>0.4211</td>
<td>20</td>
<td>1.0526</td>
</tr>
<tr>
<td>9</td>
<td>0.4737</td>
<td>21</td>
<td>1.1053</td>
</tr>
<tr>
<td>10</td>
<td>0.5263</td>
<td>22</td>
<td>1.1579</td>
</tr>
<tr>
<td>11</td>
<td>0.5789</td>
<td>23</td>
<td>1.2105</td>
</tr>
<tr>
<td>12</td>
<td>0.6316</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Summer research payments

- APM 667, RB VI-14
- Each day during the summer only used once (up to 100%)
  - Housing allowance exceptions
- Maximum of 3/9ths = 57 working days
- 1/9th = 19 working days – includes holidays!
- Paid at the salary rate in effect at the time of payment; i.e. June pay is at the pre-merit June rate
- 9/9 pay basis, so monthly rate is the annual rate divided by 9
- Must use corresponding job codes based on regular faculty title – use position from your existing pool, else request new position creation via UCPath Cert Form on our website
# Job Codes for Summer 1/9ths

<table>
<thead>
<tr>
<th>Underlying Faculty Title</th>
<th>Summer Salary Title</th>
<th>General Job Code</th>
<th>B/E/E Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistant Professor / LPSOE</td>
<td>Assistant Researcher (1/9)</td>
<td>3225</td>
<td>1986</td>
</tr>
<tr>
<td>Associate Professor / LSOE</td>
<td>Associate Researcher (1/9)</td>
<td>3215</td>
<td>1984</td>
</tr>
<tr>
<td>(Full) Professor / Sr. LSOE</td>
<td>Researcher (1/9)</td>
<td>3205</td>
<td>1982</td>
</tr>
<tr>
<td>Unit 18 doing research</td>
<td>Appropriate 1/9 Researcher title as above</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unit 18 doing teaching-related work</td>
<td>Corresponding 1/9 titles for: Lecturer/ Sr. Lecturer Continuing Lecturer/Sr. Continuing Lect</td>
<td>1632/1642</td>
<td>1633/1643</td>
</tr>
</tbody>
</table>
Summer Salary Scenarios

- 19 days (full 1/9th)
- Less than 19 days in a given month
- More than 19 days in a given month
- Flat rate dollar amount
- NIH cap and supplement
Meet Professor Coulson

- Associate Professor in the Department of Psychological & Brain Sciences
- Annual 9/12 salary of $128,000 ($10,666.67/mo)
- What’s the corresponding Researcher title to use for summer salary?
Professor Coulson’s summer salary

- Job code: Associate Researcher-AY-1/9 (3215)
- Pay basis: 9/9
- Monthly rate: $14,222.22 (= $128,000 / 9)
Professor Coulson’s Request

<table>
<thead>
<tr>
<th>Dates</th>
<th># of days</th>
<th>Dept</th>
<th>Contract/Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>June</td>
<td>flat rate</td>
<td>PSYC</td>
<td>NSF ($5000)</td>
</tr>
<tr>
<td>July 1-31</td>
<td>23</td>
<td>PSYC</td>
<td>Carter Foundation</td>
</tr>
<tr>
<td>Aug 1-27</td>
<td>19</td>
<td>NRI</td>
<td>Stark Award</td>
</tr>
<tr>
<td>Sep 7-18</td>
<td>10</td>
<td>ICB</td>
<td>DoD grant</td>
</tr>
</tbody>
</table>

Signature  **P. J. Coulson**

Date  **05/10/2020**
1/9th payment (19 days)

- Dates: 08/01/20 – 08/31/20
- % time: 100%
- Earn code: ACR
- Pay period runs entire month, but service period is 19 days (track offline)
10 days’ worth of payment

- $10 \text{ days} \div 19 \text{ days} = 0.5263$
- Job runs 9/1 – 9/30 (pay period) @ 52.63% 
- What if split funded? e.g. 6 days on Fund A + 4 days on Fund B:
  - 6 days $\div$ 10 days = 60% on Fund A
  - 4 days $\div$ 10 days = 40% on Fund B
23 days in July

- 23 days ÷ 19 days = 1.2105
- Can’t have job > 100%!
- Two separate jobs (unique position # for each one):
  - One at 1.000
  - Another at 0.2105
  - Both still run 7/1 – 7/31
Flat rate or specific % summer research payments

- Recruitment and Retention commitments
  - May be paid out over multiple summers
  - Can be awarded in terms of 1/9ths or flat amount but always paid on percentage basis

- How to compute for payroll?
  - Figure out what percentage of 1/9 this flat rate consists of
  - Convert this to closest # of actual days for offline tracking
Example: flat rate of $5000 in June

- $5000 ÷ $14,222.22 = 0.3516
- Refer to 19-day chart: closest value is 0.3684 (7 days)
- Payroll: job runs 6/1 – 6/30 @ 35.16 %
- Internal/offline records: track the 7 days of effort for future audit purposes
Summer Salary: UC Path considerations/procedure

- For summer research salary purposes ONLY, dept will initiate action and AP approves (subject to change in future years)
- AP approves action, but will NOT validate the information provided
- Timeline/approval flow: same as release-to-grant scenario, so be sure to allot extra time for processing
  - See next slide for process flow
- Note: please be sure to check the “End job automatically” box!
UCPath Procedure

Identify Position
- Use existing positions
- Update FTE if necessary
- If needed, request new positions via the UCPath Cert form

Fund Position
- REG line
- ACR line
- Each totals 100%

Concurrent Hire
- Effective Date
- End date
- Pay Freq: 9/9
- Check “End job automatically” box
- Earns Distribution ACR**
- PayPath action to change FTE, if needed
- Fulfilled by UCPC
Funding

- Can be done either before or after hire
  - Better practice: input funding before hire
- Funding entry requires a REG line—fill this with account string as normal
- Add ACR line with account string
- Since summer salary is all under ACR earn code, this will be the payment source
### Funding Entry Inquiry

- **Set ID:** SBCMP
- **Fiscal Year:** 2019
- **Budget Begin Date:** 07/01/2018
- **Budget End Date:** 06/30/2019

#### Level
- **Department:** Position Pool
- **Position Number:** 40128327
- **Position:** INF- Pav-1/9
- **Pool ID:** Date Updated: 10/05/2018

#### Job Data Snapshot

<table>
<thead>
<tr>
<th>Job details 1</th>
<th>Job details 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Empl ID</td>
</tr>
<tr>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

**Funding Effective Date:** 08/01/2018

#### Earnings Distribution

| Srn Cd | Seq # | Combo Code | Location | Sub/Object | Account | FS Dept | Fund | Dept Project | Sub Override | GL Bus Unit | Dept Cost Type | Dept Cost Center | WorkStudy Cd | OTC Indicator | Funding End Date | Pay Dist % |
|--------|-------|------------|----------|------------|---------|---------|------|--------------|--------------|-------------|---------------|-----------------|----------------|--------------|----------------|----------------|-----------|
| 1      | ACR   | 0000064278 | 8        | 010000     | 8       | 02      | SBFIN| 02           |              |             |               |                 |               |             |                | 08/31/2018       | 100.000   |
| 2      |       | 0000064278 | 8        | 010000     | 8       | 02      | SBFIN| 02           |              |             |               |                 |               |             |                |                | 100.000   |

---

**Funding**
Concurrent Hire

Pay Components should match the Professorial position.

<table>
<thead>
<tr>
<th>Job Compensation - Pay Components</th>
<th>Personalize</th>
<th>Find</th>
<th>View All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comp Rate Code</td>
<td>Compensation Rate</td>
<td>Compensation Frequency</td>
<td>Rate Code Source</td>
</tr>
<tr>
<td>1 UCANNL</td>
<td>70200.000000</td>
<td>A</td>
<td>Salary Step</td>
</tr>
<tr>
<td>2 UCOFF1</td>
<td>25200.000000</td>
<td>A</td>
<td>Manual</td>
</tr>
</tbody>
</table>

JED information MUST be on the Hire transaction:
- Earnings Distribution = “By Percent”
- Earnings Code = “ACR”
- Percent Distribution = 100%
Caps and limits based on funding

- **NIH cap**
  - Rate maximum changes each January 1 and is set by NIH. Applies to existing and new awards.
  - Currently monthly max: $16,441.67 (as of Jan 5, 2020)
  - Affects faculty who earn more than $147,900 ($16,441.67 x 9 ) annually
  - Additional information on job aids (will also be discussed in further detail in workshop)

- **NSF limit**: 2/9ths per summer

- **Other award or funding limitations**
Helpful Hints/Reminders

▪ The job code will be set up to correspond to the type of additional compensation being paid
▪ For summer research salary, perform calculations using 1/9 rate
▪ Entry of Department Chair and Director stipends are no longer done by the department— they are processed centrally
▪ Housing allowance and Chair/Director stipends should not be counted against the summer 3/9ths total
▪ All additional compensation is paid on the MO payday
▪ Check the “End job automatically” box!
▪ Ensure fund source is accurate and allowed for payment type
Strategies and Best Practices

- Coordination when multiple departments are involved

- Record keeping
  - Documentation of faculty requests and retro changes
  - Since pay periods encompass the whole month, track the actual service period separately

- Make sure your documentation is clear:
  - If the faculty member requests “one month” do they mean “a calendar month” or “19 days for 1/9th effort?”

- Requests in days vs percentage of the period
  - If in days, use the actual days (see 10-day example)
  - If in percentage, can either break into days or divide over the 19 day period; i.e. 50% of 1/9th vs 50% of 19 days (= 10/19 $\rightarrow$ 52.63%)
Strategies and Best Practices, cont’d

- Consult commitment sheet for startup 1/9ths

- Understand the “day limits”;
  - 57 days per summer (38 days for NSF)
  - Not 19 days per month; i.e. can work more than 19 days in a month

- Be aware of Merits/Promotions and range adjustments that take effect on 7/1
  - If M/P action pending: try to wait until case is finalized before entering July-Sep salary
  - Otherwise, you will have to manually adjust July+ salary to the new rate

- Advise faculty to consult with their tax advisor if they are concerned about the withholding amounts over the summer

- Post audit job record in UCPath to correct any potential issues prior to pay
Quiz

Can a faculty member be paid additional compensation in the below examples? If so, how would each be paid?

a) Professor Stark teaches an evening class through Extension.

b) Professor Lang mentors two graduate students on their theses.

c) Professor Banner is an invited speaker at a consortium at another UC campus.

d) Professor Strange of Statistics is asked by Film Studies to assist in designing and implementing a statistical survey on some aspect of film studies.
Quiz

e) Professor Foster is awarded a grant that will supply her with 33% of her salary for one quarter.
f) Professor Romanoff serves as Department Chair for her department.
g) Professor Fury serves on a search committee for his department.
h) Professor Van Dyne of History does a guest lecture for a regular Religious Studies class
Quiz

Your department has asked Professor Barton, from UC Davis, to give a lecture on “Archery with Precision” to a group of UCSB students.

a) By what method will Professor Barton get paid?

b) Who will initiate payment?

c) Which of the following is true?
   1) It is acceptable to pay Professor Barton $3000 for his lecture.
   2) It is acceptable to pay Professor Barton using state funds.
   3) The payment will count towards Professor Barton’s 3/9th limit.
Quiz

Professor Okoye is teaching a course during Summer Session D, which runs 6/22/20 – 7/10/20. She will also be doing research and wants to draw summer salary from her grants during this time period.

a) What information do you need to determine how to add the research funding?

b) What limitations apply?
   i. Salary-wise?
   ii. Appointment-wise?
Quiz

Professor Maximoff has been hired effective 07/01/20. Can she be paid 3/9ths summer salary in addition to her housing allowance during the summer of 2020?