Payroll Training
Summer 2017
May 11, 2017
AGENDA

• Welcome!
• What you need to do for Summer Session payroll
• When you need to do it
• How to enter PPS information
  ➢ Instructors of Record
    Mary Baran, Academic Personnel, x23748
  ➢ Graduate Students (Associate-Ins & Instructional Support)
    Becky Burrola, Graduate Division, x43727
    Courtney Aguila, Graduate Division, x 46562
Summer Session 2017

• Session 1: 7/3/17 – 8/5/17
• Session 2: 8/7/17 – 9/9/17
• Special Session: Dates will vary

Students started enrolling in courses 4/17/17

After 3 Weeks:
• 21,309 enrollments (Up 4%)
• 9,194 students (Up 6%)

THANK YOU!
What’s New for 2017?

- Payroll Worksheets will be uploaded to SharePoint.

- Summer Session payroll will use the SOFI 99100A fund. (Please create a summer session index under 99100A.)

- Summer Graduate Teaching Scholars (SGTS) – Faculty mentor $500 payments will NOT go through payroll. Please email a research fund index number to Denise Christensen at dechristensen@ucsd.edu.
Summer Success Programs
Credit-bearing courses in the following programs will run through Summer Session:

- Academy in the Arts & Humanities
- Summer Bridge
- Summer Engineering Institute
- Summer Transfer Academy
- Triton Edge
- Triton Prep
- Triton Sophomore Scholars

$2,500 Success Bonus will NOT be included in payroll worksheets. (Separate payment at a later date.)
Instructor Names on the Schedule of Classes

- Summer Session cannot add an instructor to the Schedule of Classes unless they are active in PPS (and ISIS). This might require you to enter his/her Summer Session teaching appointment now.
- After entering a PPS appointment, it takes an overnight refresh to appear in ISIS.
- **Mystery** – Some entries are taking longer than an overnight refresh.
- If you entered a PPS appointment over 1 week ago and the instructor is still not showing-up on the Schedule of Classes, please contact Matt at summer-scheduling@ucsd.edu.
Summer Session Payroll Requires Teamwork!

- Summer Session: How much to pay
- AP & Grad Division: Oversight
- Academic Departments: PPS entries

Instructors of Record

Summer Session Payroll
Summer Compensation for Instructors is Complicated!

- **Course Salary**
  - Full Course Salary
    - 3-6 Unit Course: 8.5% of Annual Salary
    - 2 Unit Course: 4.25% of Annual Salary
    - 1 Unit Course: 2.125% of Annual Salary
    - $10,000 Maximum per course

- **Enrollment Bonus**
  - Enrollment greater than 50 students:
    - $20 per Student (51-200) + $10 per Student (201+)
  - Closed courses in Success Programs not eligible.

- **Success Bonus**
  - Low Enrollment
    - Courses with < 15 students may be paid on contingency:
      - $100 × Units × Students
  - Graduate Students not eligible for contingent salary (Article 23).

- **Science Lab Bonus**
  - $2,500 (separate payment)
  - Not on payroll worksheet

- **Note**
  - Instructors who teach 4 courses in Summer Session will exceed the 33% of UC salary maximum if they earn less than $120,000 annual salary. Session 2 course salaries will be reduced as needed.

- **MAXIMUM ALLOWED**
  - 33% (or 3/9) of UC Annual Salary
Don’t Worry!

• Summer Session will do all the math for you!
• We’ll upload payroll worksheets to your department folder on SharePoint with all the info.
• If you need SharePoint access, email Lisa Bargabus at summer-payroll@ucsd.edu.
### SAMPLE PAYROLL WORKSHEET

#### FINAL PAYROLL WORKSHEET FOR SESSION 1

<table>
<thead>
<tr>
<th>Name</th>
<th>Faculty Type</th>
<th>Title Code</th>
<th>DOS Code</th>
<th>Appt Begins</th>
<th>Appt Ends</th>
<th>Session</th>
<th>Course ID</th>
<th>Units</th>
<th>1st Snapshot</th>
<th>2nd Snapshot</th>
<th>%Full</th>
<th>Paydate Begins</th>
<th>Paydate Ends</th>
<th>Course Salary</th>
<th>Enr Bonus</th>
<th>Total Salary</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Longbottom</td>
<td>Neville</td>
<td>Gradsdnt</td>
<td>1506 SST</td>
<td>07/01/17</td>
<td>08/05/17</td>
<td>1st</td>
<td>PHYS1C</td>
<td>3</td>
<td>68</td>
<td>58</td>
<td>0.50</td>
<td>07/01/17</td>
<td>07/31/17</td>
<td>$4,234</td>
<td>160</td>
<td>$4,394</td>
<td>$49,807</td>
</tr>
<tr>
<td>Lovegood</td>
<td>Luna</td>
<td>Gradsdnt</td>
<td>1506 SST</td>
<td>07/01/17</td>
<td>08/05/17</td>
<td>1st</td>
<td>PHYS2A</td>
<td>4</td>
<td>82</td>
<td>72</td>
<td>0.50</td>
<td>07/01/17</td>
<td>07/31/17</td>
<td>$4,234</td>
<td>440</td>
<td>$4,674</td>
<td>$49,807</td>
</tr>
<tr>
<td>Finneggan</td>
<td>Seamus</td>
<td>LSOE</td>
<td>1607 SSC</td>
<td>06/17/17</td>
<td>09/24/17</td>
<td>1st</td>
<td>PHYS2BL</td>
<td>2</td>
<td>48</td>
<td>40</td>
<td>0.50</td>
<td>07/01/17</td>
<td>07/31/17</td>
<td>$4,164</td>
<td>0</td>
<td>$4,164</td>
<td>$97,968</td>
</tr>
<tr>
<td>Chang</td>
<td>Cho</td>
<td>LNSF</td>
<td>1550 SST</td>
<td>06/17/17</td>
<td>09/24/17</td>
<td>1st</td>
<td>PHYS2C</td>
<td>4</td>
<td>107</td>
<td>85</td>
<td>0.50</td>
<td>07/01/17</td>
<td>07/31/17</td>
<td>$4,428</td>
<td>700</td>
<td>$5,128</td>
<td>$52,099</td>
</tr>
</tbody>
</table>

Notes will go here.

#### FINAL PAYROLL WORKSHEET FOR SESSION 2

<table>
<thead>
<tr>
<th>Name</th>
<th>Faculty Type</th>
<th>Title Code</th>
<th>DOS Code</th>
<th>Appt Begins</th>
<th>Appt Ends</th>
<th>Session</th>
<th>Course ID</th>
<th>Units</th>
<th>1st Snapshot</th>
<th>2nd Snapshot</th>
<th>%Full</th>
<th>Paydate Begins</th>
<th>Paydate Ends</th>
<th>Course Salary</th>
<th>Enr Bonus</th>
<th>Total Salary</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Longbottom</td>
<td>Neville</td>
<td>Gradsdnt</td>
<td>1506 SST</td>
<td>08/01/17</td>
<td>09/09/17</td>
<td>2nd</td>
<td>PHYS1C</td>
<td>3</td>
<td>68</td>
<td>58</td>
<td>0.50</td>
<td>08/01/17</td>
<td>08/31/17</td>
<td>$4,234</td>
<td>$160</td>
<td>$4,394</td>
<td>$49,807</td>
</tr>
<tr>
<td>Patil</td>
<td>Padma</td>
<td>LNSF</td>
<td>1550 SST</td>
<td>06/17/17</td>
<td>09/24/17</td>
<td>2nd</td>
<td>PHYS1A</td>
<td>3</td>
<td>58</td>
<td>43</td>
<td>0.50</td>
<td>08/01/17</td>
<td>08/31/17</td>
<td>$4,653</td>
<td>0</td>
<td>$4,653</td>
<td>$54,737</td>
</tr>
<tr>
<td>Patil</td>
<td>Padma</td>
<td>LNSF</td>
<td>1550 SST</td>
<td>06/17/17</td>
<td>09/24/17</td>
<td>2nd</td>
<td>PHYS2CL</td>
<td>2</td>
<td>90</td>
<td>90</td>
<td>0.50</td>
<td>08/01/17</td>
<td>08/31/17</td>
<td>$2,327</td>
<td>$800</td>
<td>$3,127</td>
<td>$54,737</td>
</tr>
</tbody>
</table>

Notes will go here.

### Transfer Academy Session 2

<table>
<thead>
<tr>
<th>Name</th>
<th>Faculty</th>
<th>Title</th>
<th>DOS</th>
<th>Appt Begins</th>
<th>Appt Ends</th>
<th>Session</th>
<th>Course ID</th>
<th>Units</th>
<th>1st</th>
<th>2nd</th>
<th>%Full</th>
<th>Paydate Begins</th>
<th>Paydate Ends</th>
<th>Course</th>
<th>Enr</th>
<th>Total</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Granger</td>
<td>Hermione</td>
<td>LRF</td>
<td>1103</td>
<td>06/17/17</td>
<td>09/24/17</td>
<td>2nd</td>
<td>PHYS2A</td>
<td>4</td>
<td>24</td>
<td>17</td>
<td>0.50</td>
<td>08/01/17</td>
<td>08/31/17</td>
<td>$8,526</td>
<td>0</td>
<td>$8,526</td>
<td>$100,300</td>
</tr>
</tbody>
</table>
You can get email alerts when a payroll worksheet is uploaded to SharePoint.

1. Log into SharePoint (with your email username & password)
   https://evc-share-campus.ucsd.edu/resourceadmin/summer/faculty-files/

2. From your department folder, select **Library Tools – Library**

3. Select **Alert Me – Set alarm on this library**
You can set one or more people to receive email when a payroll worksheet is uploaded!
Timeline for Session 1 & Special Session Payroll Worksheets

**JUNE**

- 7: 1st Snapshot
- 12: Cancel Courses
- 13: Payroll Worksheet
- 15: Departments with Courses < 50 Students

**JULY**

- 1: 2nd Snapshot
- 9: Calculate Bonuses
- 10: 13: Final Payroll Worksheet
- 14: All Departments

**Timeline**

- 8/1/17 PAYDATE
- 8/1/17 PPS Deadline
Timeline for Session 2 Payroll Worksheets

**JULY**
- 12: 1st Snapshot
- 17: Cancel Courses
- 18: 2nd Snapshot
- 20: Departments with Courses < 50 Students
- **21**: Payroll Worksheet

**AUGUST**
- 1: Final Payroll Worksheet
- 13: Calculate Bonuses
- 14: All Departments
- 15: 2nd Snapshot
- 16: All Departments
- 17: Payroll Worksheet
- 18: All Departments
- 23: Payroll Deadline
- 24: 9/1/17 PAYDATE
1 Summer Session Course - 50% appointment
2 Summer Session Courses - 100% appointment

Maximum
- 2 courses per Session
- 4 courses total during Summer Session
Useful Stuff you need to know for PPS

## DOS Codes

<table>
<thead>
<tr>
<th>SSC</th>
<th>SST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hint: <strong>SECURE</strong></td>
<td>Hint: <strong>TEMPORARY</strong></td>
</tr>
<tr>
<td>UC Ladder Rank Faculty</td>
<td>Everyone Else</td>
</tr>
<tr>
<td>Professor</td>
<td>Visiting Prof</td>
</tr>
<tr>
<td>LSOE</td>
<td>Lecturer</td>
</tr>
<tr>
<td>LPSOE</td>
<td>Associate-In</td>
</tr>
<tr>
<td>Adjunct Professor</td>
<td></td>
</tr>
</tbody>
</table>
Useful Stuff you need to know for PPS

<table>
<thead>
<tr>
<th>Sub 0</th>
<th>Sub 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Instructors of Record</td>
<td>Reader and Tutor</td>
</tr>
<tr>
<td>Teaching Assistant (TA)</td>
<td>Timekeeping required</td>
</tr>
<tr>
<td>No timekeeping</td>
<td>Hourly reported in TAR</td>
</tr>
<tr>
<td>Flat rate paid</td>
<td></td>
</tr>
</tbody>
</table>
Title Code 1100 – PROF-AY; 1st Session, 07/03/17 - 08/05/17 (Paydate 08/01/17)

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Emp Stat</th>
<th>Pri Pay</th>
<th>PAF Gen No.</th>
<th>Stu/Reg</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>001100000</td>
<td>WILSON, JACK</td>
<td>A</td>
<td>MO</td>
<td>120</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

### Appts. / Distributions-Condense

<table>
<thead>
<tr>
<th>Appt</th>
<th>Actions</th>
<th>Pgm</th>
<th>Typ</th>
<th>Bas Pd</th>
<th>Ovr</th>
<th>Asst Begin</th>
<th>Asst End</th>
<th>Dur</th>
<th>Dept</th>
<th>FLSA</th>
</tr>
</thead>
<tbody>
<tr>
<td>30</td>
<td>___</td>
<td>A</td>
<td>5</td>
<td></td>
<td></td>
<td>061717</td>
<td>092417</td>
<td></td>
<td>00207</td>
<td></td>
</tr>
</tbody>
</table>

### Title

<table>
<thead>
<tr>
<th>Grade</th>
<th>Full F/V</th>
<th>Ann/Hr Rate</th>
<th>Rt Sch Time</th>
<th>Lv</th>
</tr>
</thead>
<tbody>
<tr>
<td>.50</td>
<td>F</td>
<td>8511.00</td>
<td>B</td>
<td>MO</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

### Dist No

<table>
<thead>
<tr>
<th>Actions</th>
<th>Index</th>
<th>Fund</th>
<th>Sub</th>
<th>FTE</th>
<th>Dis %</th>
<th>PayBeg</th>
<th>PayEnd</th>
<th>Step</th>
<th>OA</th>
<th>Rate/Amt</th>
<th>DOS</th>
<th>PRQ</th>
<th>D W</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>THEXX</td>
<td>99100A</td>
<td>0</td>
<td>0.00</td>
<td>070117</td>
<td>073117</td>
<td></td>
<td>-</td>
<td>8271.00</td>
<td>SSC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>THEXX</td>
<td>99100A</td>
<td>0</td>
<td>0.00</td>
<td>070117</td>
<td>073117</td>
<td></td>
<td>-</td>
<td>240.00</td>
<td>SSC</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### PAN Comments

PROF-AY, 50%, 1st Session
Course Dates: 07/03/17 - 08/05/17
Course Payment: $8,271, Enrollment Bonus $240
Sue x41122
<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Emp Stat</th>
<th>Pri Pay</th>
<th>PAF Gen No</th>
<th>Stu/Reg</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>100333333</td>
<td>SESSIONS, MARK</td>
<td></td>
<td></td>
<td>120</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Title Code  | Lecturer/SOE, Summer Session II, 08/07/17 - 09/09/17 (Paydate 9/1/17) |

<table>
<thead>
<tr>
<th>Actions</th>
<th>Index</th>
<th>Fund Sub</th>
<th>FTE</th>
<th>Dis %</th>
<th>PayBeg</th>
<th>PayEnd</th>
<th>Step OA</th>
<th>Rate/Amt</th>
<th>DOS</th>
<th>PRQ</th>
<th>D W</th>
</tr>
</thead>
<tbody>
<tr>
<td>51</td>
<td>PPP1754</td>
<td>99100A</td>
<td>0</td>
<td></td>
<td>080117</td>
<td>083117</td>
<td>-</td>
<td>5353.00</td>
<td>SSC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>PPP1754</td>
<td>99100A</td>
<td>0</td>
<td></td>
<td>080117</td>
<td>083117</td>
<td>-</td>
<td>5353.00</td>
<td>SSC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PAN Comments

Lecturer/SOE, 100%, 2nd Session
Course Dates: 08/07/17 - 09/09/17
Two Course Payments: $5353, $5353
Total Payment: $10,706
Sue x41122
Title Code 1550 – Lecturer NSF; Summer Session I, 07/03/17 - 08/05/17 (Paydate 08/01/17)

Lecturer NSF, 50%, 1st Session
Course Dates: 07/03/17 - 08/05/17
Course Payment: $4,428
Sue x41122
General Reminders

- Obtain home department approval
- Check eligibility (academic and financial)
- Check work permit end date (F1: see line 5 in I-20; J1: see line 3 on DS-2019)
- Add new appointment line in PPS when changing Title Code, step, rate, or percentage
- Add WOS appts for students still engaged in research when appropriate
- Add College Code as 00 for graduate students to avoid incorrect DCP deductions
- College Code stays blank for undergraduate students and Nonstudent Tutors
<table>
<thead>
<tr>
<th>ID: 012345678</th>
<th>Name: TRITON, LUKE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emp Stat: A</td>
<td>Pri Pay: MO</td>
</tr>
<tr>
<td>PAF Gen No: 120</td>
<td>Stu/Reg:</td>
</tr>
<tr>
<td>Appt</td>
<td>Actions Pgm</td>
</tr>
<tr>
<td>10</td>
<td>A</td>
</tr>
<tr>
<td>Title</td>
<td>Grade</td>
</tr>
<tr>
<td>ASSOC IN -AY-1/9-GSHIP</td>
<td>50</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dist No</th>
<th>Actions</th>
<th>Index</th>
<th>Fund</th>
<th>Sub</th>
<th>FTE</th>
<th>Dis %</th>
<th>PayBeg</th>
<th>PayEnd</th>
<th>Step</th>
<th>OA</th>
<th>Rate/Amt</th>
<th>DOS</th>
<th>PRQ</th>
<th>D W</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>MYFUND</td>
<td>99100A</td>
<td>0</td>
<td>070117</td>
<td>073117</td>
<td></td>
<td>4234.00</td>
<td>SST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Next Func: | ID: | Name: | SSN: |

ASSOCIATE IN, 50%, 1st Session
Course Dates: 07/03/17 - 08/05/17
Course Salary: $4,234
Sue x41122

PAN Comments
### Title Code 2310 – Teaching Assistant for Summer Session I (Pay Date: 08/01/2017)

<table>
<thead>
<tr>
<th>ID:</th>
<th>Name:</th>
<th>Emp Stat: A</th>
<th>Pri Pay: MO</th>
<th>PAF Gen No: 9</th>
<th>Stu/Reg: Y</th>
<th>Appt Begin</th>
<th>Appt End Dur</th>
<th>Dept</th>
<th>FLSA</th>
<th>Grade</th>
<th>% Full</th>
<th>F/V</th>
<th>Ann/HR Rate</th>
<th>Rt Sch</th>
<th>Time Lvl</th>
</tr>
</thead>
<tbody>
<tr>
<td>40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>070117</td>
<td>080517</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3038.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title</th>
<th>Actions Pgm</th>
<th>Typ Bas Pd Ovr</th>
<th>Appt</th>
<th>Dist No</th>
<th>Index</th>
<th>Fund</th>
<th>Sub</th>
<th>FTE</th>
<th>Dis</th>
<th>PayBeg</th>
<th>PayEnd</th>
<th>Step</th>
<th>OA</th>
<th>Rate/Amt</th>
<th>DOS</th>
<th>PRQ</th>
<th>D W</th>
</tr>
</thead>
<tbody>
<tr>
<td>2310</td>
<td>TEACHG ASST-GSHIP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>MYFUND</td>
<td>99100A</td>
<td>0</td>
<td>070117</td>
<td>073117</td>
<td></td>
<td>3038.00</td>
<td>SST</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Next Func:**
- ID: 00001 Input accepted

**F:**
- 1-Help
- 2-Cancel
- 4-Print
- 5-Update
- 7-Backward
- 9-Jump

---

**PAN Comments**

- TA, Graduate, 50%, sub 0, 1st Session
- Course Dates: 07/03/17 - 08/05/17
- Course Salary: $3038.00
- Pay date: 08/01/2017
NOTE: Readers and Tutors are SUB 2 and are required to submit a timesheet. Calculate the hours worked and multiply by the hourly rate, then enter the total under the Rate column in TAR. Readers and Tutors must be set up monthly if they have a concurrent monthly appointment.

Title Code 2850 – Graduate Reader for Summer Session II (Paydate 09/01/2017)

Action Points / Distributions - Condense

Title: READER-GSHIP

Grade % Full F/V Ann/Hr Rate: 0.25
Annual Salary: 766.00
Rate Code: B MO A N

Next Func: U0001 Input accepted

Reader, Graduate, 25%, sub 2, 2nd Session
Course Dates: 08/07/17 - 09/09/17
Course Salary: $766
Pay date: 09/01/17

PAN Comments
Title Code 2860 – Graduate Tutor BW for Summer Session II (Pay Date: 09/01/2017)

NOTE: Readers and Tutors are SUB 2 and are required to submit a timesheet. Calculate the hours worked and multiply by the hourly rate, then enter the total under the Rate column in TAR. Readers and Tutors must be set up monthly if they have a concurrent monthly appointment.

PPEAPC0-E1595  SD EDB Entry/Update  05/06/17 15:39:31
05/04/17 19:35:50  Appts./Distributions-Condense  Userid:
ID: Name: Emp Stat: A Pri Pay: MO
PAF Gen No: Stu/Reg: Y Page 3 of 3
Appt Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept FLSA
40  A  5  080117 090917 00203
Title Grade %Full F/V Ann/Hr Rate Rt Sch Time Lvl
2860 TUT-GSHIP  0.25  V 1135.00 B MO A N

Dist No
Actions Index Fund Sub FTE Dis % PayBeg PayEnd Step OA Rate/Amt DOS PRQ D W
41 MYFUND 99100A 2 080117 083117 1135.00 SST

Next Func: ID: Name: SSN:
U0001 Input accepted

F: 1-Help 2-Cancel 4-Print 5-Update
F: 7-Backward 9-Jump

PAN Comments

Tutor, Graduate, 25%, sub 2, 2nd Session
Course Dates: 08/05/17 - 09/09/17
Course Salary: $1135.00
Pay date: 09/01/2017
Questions?

We are happy to help!

Summer Session Contacts

Lisa Bargabus
Faculty hiring & payroll
x 25064
summer-payroll@ucsd.edu

Matt Sapien
Course Scheduling
x 44744
summer-scheduling@ucsd.edu

Becky Arce
Summer Session Director
X47074
barce@ucsd.edu