

UNIVERSITY OF CALIFORNIA, SAN DIEGO

SUMMER SESSION 2018



UC San Diego

PAYROLL MANUAL

SUMMER SESSION

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How to Use this Manual

The first section of this manual describes key dates for Summer Session payroll, including:

- Summer Session term dates
- UCSD Payroll and Timekeeping deadline calendars
- Master Summer Session payroll calendar

The remainder of the manual is divided into two sections:

1. Instructors of Record
2. Instructional Support (Academic Student Employees)

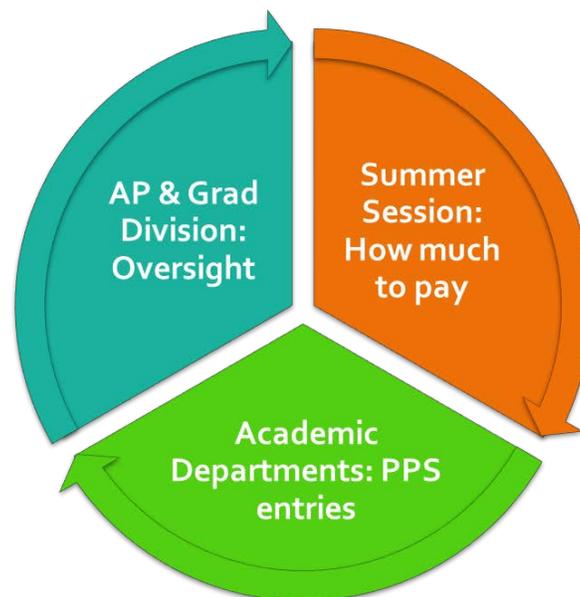
Topics covered in each section include:

- Summer Session compensation policy
- PPS entry guidelines
- Sample PPS screens

The Appendix lists instructions for PPS error corrections and retroactive payments.

Summer Session Payroll Requires Teamwork!

Your team spirit and cooperation are very much appreciated.



UC San Diego – Summer Session 2018 Dates

5 WEEK SESSIONS	
Session 1	July 2 – August 4
Session 2	August 6 – September 8

SPECIAL SESSIONS (Courses that are not 5 weeks)	
3 Week Sessions	July 2 – July 21 July 23 – August 11 August 13 – September 1
8 Week Session	July 2 – August 25
10 Week Session	July 2 – September 8

Bold Special Sessions use the payroll processing dates for Session 1.

The last 3 Week Session starting in August uses the payroll processing dates for Session 2.

UC San Diego - Payroll Timekeeping and PPS Entry Deadlines

The bi-weekly and monthly schedules can be found at: <http://www-bfs.ucsd.edu/PAY/ENTRYSCH.HTM>.

Biweekly Deadline Schedule (Updated 11/09/17)				
<i>Pay Period Dates</i>	<i>Timekeeping Entry</i>	<i>PPS Entry</i>	<i>Deadline to Stop Direct Deposit (10:00a.m.)</i>	<i>Payday</i>
06/03/18-06/16/18	06/19/18	06/20/18	06/25/18	06/27/18
06/17/18-06/30/18	07/02/18	07/03/18	07/09/18	07/11/18
07/01/18-07/14/18	07/18/18	07/19/18	07/23/18	07/25/18
07/15/18-07/28/18	07/31/18	08/01/18	08/06/18	08/08/18
07/29/18-08/11/18	08/15/18	08/16/18	08/20/18	08/22/18
08/12/18-08/25/18	08/28/18	08/29/18	08/31/18	09/05/18
08/26/18-09/08/18	09/12/18	09/13/18	09/17/18	09/19/18
09/09/18-09/22/18	09/26/18	09/27/18	10/01/18	10/03/18
09/23/18-10/06/18	10/10/18	10/11/18	10/15/18	10/17/18
10/07/18-10/20/18	10/23/18	10/24/18	10/29/18	10/31/18

Monthly Deadline Schedule (Updated 11/09/17)				
<i>Pay Period Dates</i>	<i>Timekeeping Entry</i>	<i>PPS Entry</i>	<i>Deadline to Stop Direct Deposit (10:00a.m.)</i>	<i>Payday</i>
11/01/17-11/30/17	11/21/17	11/22/17	11/29/17	12/01/17
12/01/17-12/31/17	12/20/17	12/21/17	12/28/17	01/02/18
01/01/18-01/31/18	01/24/18	01/25/18	01/31/18	02/01/18
02/01/18-02/28/18	02/21/18	02/22/18	02/28/18	03/01/18
03/01/18-03/31/18	03/21/18	03/22/18	03/27/18	03/29/18
04/01/18-04/30/18	04/23/18	04/24/18	04/27/18	05/01/18
05/01/18-05/31/18	05/23/18	05/24/18	05/30/18	06/01/18
06/01/18-06/30/18	06/20/18	06/21/18	06/27/18	06/29/18
07/01/18-07/31/18	07/24/18	07/25/18	07/30/18	08/01/18
08/01/18-08/31/18	08/22/18	08/23/18	08/29/18	08/31/18
09/01/18-09/30/18	09/23/18	09/24/18	09/27/18	10/01/18
10/01/18-10/31/18	10/24/18	10/25/18	10/30/18	11/01/18
11/01/18-11/30/18	11/20/18	11/21/18	11/28/18	11/30/18
12/01/18-12/31/18	12/19/18	12/20/18	12/27/18	01/02/19

Summer Session – 2018 Payroll Calendar

		SESSION 1	SESSION 2
		& July Special Sessions	& August Special Sessions
JUNE	6	Contingent vs. full salary determined (1 st enrollment snapshot)	
	11	Last day for Summer Session to cancel courses for low enrollment	
	18	Preliminary payroll worksheet available on SharePoint	
JULY	2	SESSION 1 Starts	
	2	Must have signed appointment letters by this date from TAs before they begin working.	
	2	Timekeeping deadline (biweekly)	
	4	HOLIDAY – No Classes.	
	9	Final course salaries and bonus compensation are calculated. (2 nd enrollment snapshot)	
	11	Biweekly Pay Date - Readers, Tutors	Contingent vs. full salary determined (1 st enrollment snapshot)
	16	Final payroll worksheet on SharePoint	
	16		Last day for Summer Session to cancel courses for low enrollment
	18	Timekeeping deadline (biweekly)	
	19	PPS Entry Deadline (biweekly)	
	23		Preliminary payroll worksheets available on SharePoint
	24	Timekeeping deadline (monthly)	
	25	PPS Entry deadline (monthly)	
	25	Biweekly Pay Date - Readers, Tutors	
	31	Timekeeping deadline (biweekly)	
AUGUST	1	PAY DATE - Instructors	
	1	PPS Entry Deadline (biweekly)	
	4	SESSION 1 Ends	
	4	Separation date for visiting instructors with no other UCSD appointments	
	6		SESSION 2 Starts
	6		Must have signed appointment letters by this date from TAs before they begin working
	8	Biweekly Pay Date - Readers, Tutors	
	13		Final course salaries and bonus compensation are calculated. (2 nd enrollment snapshot)
	15		Timekeeping deadline (biweekly)
	16		PPS Entry Deadline (biweekly)
	16		Final payroll worksheet on SharePoint
	22		Biweekly Pay Date - Readers, Tutors
	22		Timekeeping deadline (monthly)
	23		PPS Entry deadline (monthly)
	28		Timekeeping deadline (biweekly)
29		PPS Entry Deadline (biweekly)	
31		PAY DATE - Instructors	
SEPTEMBER	3	HOLIDAY – No Classes	
	5		Biweekly Pay Date - Readers, Tutors
	8		SESSION 2 Ends

	8	Separation date for visiting instructors with no other UCSD appointments
	12	Timekeeping deadline (biweekly)
	13	PPS Entry Deadline (biweekly)
	19	Biweekly Pay Date - Readers, Tutors
	23	Summer Session Ends
	23	Timekeeping Entry Deadline (monthly)
	24	PPS entry deadline (monthly)
	26	Timekeeping deadline (biweekly)
	27	PPS Entry deadline (biweekly)
OCTOBER	1	Pay Date - Any remaining Instructors and TAs
	3	Biweekly Pay Date - Readers, Tutors
	31	Payroll expense accounts close

Instructor of Record Compensation

Details on instructor eligibility for Summer Session teaching appointments are available in the [Summer Session Guidebook](#) and [Summer Session Faculty Appointment Handbook](#).

- Summer Session faculty are paid per course.
 - One course – 50% appointment
 - Two courses – 100% appointment
- Some Summer Session faculty are eligible to earn extra bonuses. See details in the table below.
- Summer Session provides course salaries and bonuses to academic departments on payroll worksheets.
- Academic department AP staff enter Summer Session teaching appointments into PPS.

Type of Compensation	All Instructors?	Conditions	How it is Calculated?
Course Salary	Y	<p>33% of annual salary is maximum compensation allowed in summer</p> <p>Recall faculty – 43% max per month</p> <p>Based on annual salary in effect on 6/30/18.</p>	<p><u>Courses with 15 or more students:</u> 8.5% of annual UCSD AY salary (3 or more Units) 4.25% of annual UCSD AY salary (1-2 Units) \$10,000 limit</p> <p><u>Courses with less than 15 students:</u> \$100 × Units × Students Not to exceed Full Course Salary</p>
Course Salary for Visiting Instructors	Y	<p>DUE approval required – appointment file on SharePoint.</p> <p>Visa Status – International visiting instructors must hold appropriate Visa status to be eligible for payment.</p> <p>Visitors must be separated at the end of their Summer Session teaching appointment.</p> <p>Some UCSD staff may be approved teach if they reduce current appointment or use vacation days.</p>	<p>Visiting instructor annual salary must align with UCSD salary scales.</p> <p><u>Courses with 15 or more students:</u> 8.5% of annual UCSD AY salary (3 or more Units) 4.25% of annual UCSD AY salary (1-2 Units) \$10,000 limit</p> <p><u>Courses with less than 15 students:</u> \$100 × Units × Students Not to exceed Full Course Salary</p>
Course Salary for Associates-In	All Grad Students	Graduate Division Dean approval required – submitted via ASES	<p>\$4,361 (3 or more Units) \$2,180 (1-2 Units) Not eligible for contingent salary (Article 23)</p>
Science Lab Bonus	N	Only for specific Biology and Chemistry wet lab courses.	87.5% of Course Salary
Enrollment Bonus	N	<p>Only for courses with more than 50 students enrolled.</p> <p>Enrollment is measured: Session 1 – 7/9/18 Session 2 – 8/13/18 Special Session – Varies</p>	<p>Paid per course if 51+ students are enrolled: \$20 per student (51-200) + \$10 per student (201+)</p>
Success Bonus	N	Only for courses in Summer Success Programs.	<p>\$500 per week Paid in November – Will NOT be listed on the payroll worksheets.</p> <p>Summer Session will notify department AP staff when to enter Success Bonus payments into PPS.</p>

Instructor of Record Compensation - Restrictions

The maximum allowed for ALL summer compensation is:

- 33% of annual UC AY Salary (1/9 for 3 summer months = 3/9). [See APM-600.](#)

Note: Faculty teaching 4 Summer Session courses will exceed the 33% restriction if they earn less than \$120,000 annual salary. Session 2 course salaries will be reduced as needed to stay below 33% max.

- 43% limit for Emeriti (Recall faculty). [See APM-205.](#)
- Academic Administrators (Ex. Provost, Dept. Chair) – AP will review compensation on a case-by-case basis.

Instructor of Record Compensation – Deductions

Taxes

The tax rate for compensation during summer depends on appointment type and DCP eligibility. See APC-661, Appendix 1, APM 190 Appendix G, and PPM 230-43.

Unit 18 lecturers, instructors with a concurrent fiscal-year appointment, associates-in, emeriti faculty, appointees who have not worked at UCSD at any point in during the academic year (visiting faculty), staff who teach during the summer, researchers, and current under-graduate and graduate students employed as instructional support will be taxed based on W-4 allowances and the standard monthly tax tables.

Important - This may place an instructor into higher federal and state tax brackets, resulting in a greater rate of tax withholding. This is due to the respective tax agency's regulations that do not allow any consideration for summer salary being seasonal. It is recommended that instructors consult an outside financial advisor to assist them in making any changes to their W-4 withholding allowances to avoid excess tax withholdings.

Benefits

- **Summer Salary – 403(b) Account**

UC professors and Lecturers with Security of Employment are eligible for a special summer salary benefit directed to a Tax-Deferred 403(b) Plan.

Compensation that many academic appointees receive for summer session is not considered covered compensation for determining UCRP benefits. Therefore, the 403(b) Plan provides employer and employee contributions to a Pretax Account based on eligible summer salary. The total contribution rate is 7 percent - employee pretax contribution of 3.5 percent and employer pretax contribution of 3.5 percent.

For more details, please see APM-190, Appendix G: <https://www.ucop.edu/academic-personnel-programs/academic-personnel-policy/policy-issuances-and-guidelines/revised-apm-190-appdx-g.html>

- **DCP for Graduate Students**

All international students on F1 and J1 visas, who are nonresident aliens for US tax purposes only, are exempt from student FICA. International students on F1 and J1 visas generally become resident aliens, for US tax purposes only, after their fifth calendar year in the United States.

More details on the Graduate Division website: <http://grad.ucsd.edu/files/financial/employment/studentfica.pdf>

Nonresident alien employees who hold F1 or J1 visas, but meet the qualifications for resident alien status for tax purposes, are subject to DCP/Medicare withholding unless they meet the minimum course load requirement and have an appointment of less than 80% time. Student employees should contact their local Payroll Office if they believe they qualify to become resident aliens.

More details on UCOP website: <http://www.ucop.edu/financial-accounting/files/StudentFICAGuidelines1.pdf>

- **Safe Harbor**

UCSD Payroll deducts a total of 8.45% (7% DCP; 1.45% Medicare) from all summer wages. This is a mandatory contribution that is taken out in lieu of Social Security. Employees can request a disbursement of the DCP funds after they are separated from UCSD.

- Non-residents on an F-1 (on-campus employment of 20 hours per week or less) or J-1 Visa do not contribute.

For additional information, please visit the websites listed below.

http://atyourservice.ucop.edu/employees/retirement_savings/retirement_savings_program.html

<http://grad.ucsd.edu/financial/employment/student-fica-dcp.html>

- **Benefits**

Summer Session appointments are not considered benefits-eligible appointments. The hours worked during Summer Session do not contribute towards the hours required to maintain benefits eligibility.

For more information on benefits eligibility, please contact your department's HR representative.

Special Compensation - Summer Graduate Teaching Scholars Program

The Summer Graduate Teaching Scholars (SGTS) program gives graduate students an opportunity to participate in a faculty-mentored, professional development and teaching program.

SGTS program details can be found at <https://academicaffairs.ucsd.edu/ug-ed/sgts/index.html>

- In November, department chairs and program directors nominate graduate students.
- In November, academic departments also submit courses that taught by SGTS nominees to Summer Session for approval (standard procedure).
- SGTS award recipients are announced at the end of fall quarter.
- Summer Session approved courses are announced in December.
- SGTS participants teach a standard Summer Session course(s), and attend required teaching preparation and support sessions through the Center for Engaged Teaching (CET).
- Faculty Mentors support their SGTS graduate student, as needed.

Note: Students not accepted into the SGTS program may still teach Summer Session courses as Associates-In, pending Graduate Division Dean approval.

SGTS Compensation – 3 Parts

SGTS Bonus Payment	Summer Session Course Salary	Faculty Mentor Payments
<p>SGTS graduate students receive \$1,200 for participating in the CET training sessions.</p> <p>This bonus is paid even if the course is cancelled due to low enrollment.</p> <p>Graduate Division processes these payments automatically.</p> <p>Students will receive the \$1,200 on 7/1/18.</p>	<p>SGTS graduate students are hired and paid following the standard Summer Session model.</p> <p>Departments submit students via ASES. Graduate Division Dean approves the appointments.</p> <p>4-Unit Course - \$4,361 1-2 Unit Course - \$2,180</p> <p>Session 1 pay date – 8/1/18 Session 2 pay date – 8/31/18</p> <p>SGTS graduate students are listed on payroll worksheets with all department Summer Session instructors.</p> <p>Academic department staff enters PPS appointments.</p>	<p>Faculty Mentors who nominate graduate students accepted into the SGTS program receive \$500 payment to a research account.</p> <p>This payment will not be processed through payroll.</p> <p>Academic departments – Please email Denise Christensen (dechristensen@ucsd.edu, x20443) with a research account index by March 31, 2018.</p>

Sample 2018 Payroll Worksheet – Instructors of Record

Payroll worksheets from Summer Session will show how much each instructor should be paid, and include the values to enter in the PPS fields.

Date: 8/16/18 Department: Cognitive Science Summer Session Payroll Index # MYINDEX Fund: 99100A Sub: 0				Questions? Contact Lisa Bargabus at x25064 or summer-payroll@ucsd.edu 7/16/18 - Final Session 1 worksheet with enrollment bonuses. 7/23/18 - Added 1st snapshot for Session 2. Bonuses will be added after 8/13/18 snapshot. 8/16/18 - Added 2nd snapshot for Session 2 & enrollment bonuses. Final worksheet.													
FINAL PAYROLL WORKSHEET FOR SESSION 1																	
Paydate: 08/01/18		Appointment Line				Distribution Lines										Appt Ann/Hr Rate	
Name	Faculty Type	Title Code	DOS Code	Appt Begins	Appt Ends	Session	CourseID	Units	1st Snapshot	2nd Snapshot	%Full	Paydate Begins	Paydate Ends	Course Salary	Enr Bonus	Total Salary	
Weasley	Rose	GradStdnt	1506	SST	07/01/18	08/04/18	1	COGS109	4	69	66	0.50	07/01/18	07/31/18	\$4,361	\$320	\$4,681
Lovegood	Luna	LRF	1203	SSC	06/16/18	09/23/18	1	COGS107A	4	67	60	0.50	07/01/18	07/31/18	\$10,000	\$200	\$10,200
Chang	Cho	LNSF	1550	SST	06/16/18	09/23/18	1	COGS11	4	11	10	0.50	07/01/18	07/31/18	\$4,400	\$0	\$4,400
Longbottom	Neville	LRF	1103	SSC	06/16/18	09/23/18	1	COGS151	4	24	17	0.50	07/01/18	07/31/18	\$10,000	\$0	\$10,000
7/16/18 - Chang - Paid on contingency: \$400 * 11 = \$4,400																	
FINAL PAYROLL WORKSHEET FOR SESSION 2																	
Paydate: 08/31/18		Appointment Line				Distribution Lines										Appt Ann/Hr Rate	
Name	Faculty Type	Title Code	DOS Code	Appt Begins	Appt Ends	Session	CourseID	Units	1st Snapshot	2nd Snapshot	%Full	Paydate Begins	Paydate Ends	Course Salary	Enr Bonus	Total Salary	
Bones	Susan	LNSF	1550	SST	06/16/18	09/23/18	2	COGS187A	6	69	68	0.50	08/01/18	08/31/18	\$9,377	\$0	\$9,377
Bones	Susan	LNSF	1550	SST	06/16/18	09/23/18	2	COGS102A	4	68	62	0.50	08/01/18	08/31/18	\$9,376	\$0	\$9,376
Krum	Victor	VistLect	1550	SST	06/16/18	09/23/18	2	COGS188	4	13	11	0.50	08/01/18	08/31/18	\$4,539	\$0	\$4,539
Potter	Albus	GradStdnt	1506	SST	08/01/18	09/08/17	2	COGS14A	4	70	61	0.50	08/01/18	08/31/18	\$4,361	\$220	\$4,581
7/23/18 - Susan Bones is teaching 4 courses. Her Session 2 course salaries are reduced to \$9,377 to stay under \$38,271 (33% annual salary max). \$38,271 - \$19,518 from Session 1 = \$18,753, or \$9,377 & \$9,376 for Session 2. 8/16/18 - Enrollment bonuses and adjusted total salaries are highlighted.																	

Summer DOS Codes

SSC	SST
Hint: Think SECURE (Contributing to retirement)	Hint: Think Temporary
UCSD Ladder Rank Faculty: Professor/Assoc Prof/Asst Prof LSOE and LPSOE Adjunct Professor	Emeriti (Recall) Unit 18 Lecturers Visiting Instructors Associates-In Grad students who require positive time reporting/Sub-2 (Readers & Tutors)

Dates for Summer Session Appointments and Distributions

Appointment dates used for Associates-In are different from other Instructors of Record. (See below).

Dates for Associates-In

	Appointment Start Must match distribution start date	Appointment End	Distribution Start	Distribution End
Session 1	7/1/18	8/4/18	7/1/18	7/31/18
Session 2	8/1/18	9/8/18	8/1/18	8/31/18
Special - 3 Weeks 7/2/18-7/21/18	7/1/18	7/21/18	7/1/18	7/31/18
Special – 3 Weeks 7/23/18 – 8/11/18	7/1/18	8/11/18	7/1/18	7/31/18
Special – 3 Weeks 8/13/18 – 9/1/18	8/1/18	9/1/18	8/1/18	8/31/18
Special – 8 Weeks 7/2/18 – 8/25/18	7/1/18	8/25/18	7/1/18	7/31/18
Special – 10 Weeks 7/2/18 – 9/8/18	7/1/18	9/8/18	7/1/18	7/31/18

Dates for All Other Instructors of Record

	Appointment Start	Appointment End	Distribution Start	Distribution End
Session 1	6/16/18	9/23/18	7/1/18	7/31/18
Session 2	6/16/18	9/23/18	8/1/18	8/31/18
Special - 3 Weeks 7/2/18-7/21/18	6/16/18	9/23/18	7/1/18	7/31/18
Special – 3 Weeks 7/23/18 – 8/11/18	6/16/18	9/23/18	7/1/18	7/31/18
Special – 3 Weeks 8/13/18 – 9/1/18	6/16/18	9/23/18	8/1/18	8/31/18
Special – 8 Weeks 7/2/18 – 8/25/18	6/16/18	9/23/18	7/1/18	7/31/18
Special – 10 Weeks 7/2/18 – 9/8/18	6/16/18	9/23/18	7/1/18	7/31/18

Schedule for Payroll Worksheets

Payroll worksheets will be uploaded to the Summer Session SharePoint site:

<https://evc-share-campus.ucsd.edu/resourceadmin/summer/faculty-files/>

Guidelines on when to enter Summer Session appointments into PPS.

	I want to enter PPS appointments ASAP. I do not mind making edits later.	I only want to enter PPS appointments once.
<p>SESSION 1</p> <p>& Special Sessions starting in July*</p> <p>PPS Deadline 7/25/18</p> <p>Pay Date 8/1/18</p>	<p>June 18, 2018</p> <ul style="list-style-type: none"> • Course salaries (Contingent salaries may increase.) <p>July 16, 2018</p> <ul style="list-style-type: none"> • Final course salaries • Enrollment bonuses 	<p>July 16, 2018</p> <ul style="list-style-type: none"> • Final course salaries • Enrollment bonuses
<p>SESSION 2</p> <p>& Special Session starting in August</p> <p>PPS Deadline 8/23/18</p> <p>Pay Date 8/31/18</p>	<p>July 23, 2018</p> <ul style="list-style-type: none"> • Course salaries (Contingent salaries may increase.) <p>August 16, 2018</p> <ul style="list-style-type: none"> • Final course salaries • Enrollment bonuses 	<p>August 16, 2018</p> <ul style="list-style-type: none"> • Final course salaries • Enrollment bonuses
<p>*The 3-Week Special Session starting 7/23/18 will pay enrollment bonuses on the 8/31/18 pay date.</p>		

Note: Summer Session may request that departments to enter a PPS appointment for visiting faculty before the preliminary payroll worksheets are available. Those requests will be made on a case-by-case basis.

PPS Data Entry Guidelines – Instructors of Record

PLEASE NOTE: Instructors who teach both sessions 1 and 2 are not separated between sessions.

1. Log into PPS
2. Choose a PPS screen or bundle to navigate through screens:
 - EAPC for instructors with an active appointment
 - RHIR for rehiring instructors who have been separated in PPS
 - HIRE for new hires
3. Enter EAPC, RHIR, or HIRE in the “Next Func” field along with either the employee ID number or name
4. Press F9 or navigate to the “command line” and type “Add A” then press Enter key

Note on Benefits: The BELI code on the EPER screen is changed to 5 to **stop benefits** in these situations:

- Lecturers with a 9/9 appointment
- Instructors with 9/12 or 11/12 appointment that ends on 6/30
- When completing the HIRE or RHIR bundle
- Graduate students (Associates-In) are **not** eligible for benefits

APPOINTMENT LINE for **TOTAL COMPENSATION** – COURSE SALARIES plus BONUSES (if applicable)

Type	5		
Basis	(leave blank)		
Pd Ovr	(leave blank)		
Appt Begin	061618	DIFFERENT DATES for Associates-In	
		Session 1 070118	Session 2 080118
Appt End	092318	DIFFERENT DATES for Associates-In	
		Session 1 080418	Session 2 090818
Dept	6-digit department code		
Title	Enter title code from payroll worksheet		
% Full	50% for one course 100% or two courses		
F/V	F (fixed)		
Annually	Add all Summer Session compensation (salary + bonuses)		
Rt	B (By-agreement)		
Sch	MO (Monthly)		
Time	N (no time sheet produced, not necessary)		
Lv	N (No Leave Accrual)		

DISTRIBUTION LINE for **COURSE SALARY**

Index	Your department index (funding source SOFI 99100A)	
Sub	0	
Dist %	(leave blank)	
Pay Begin	Session 1 & July Special Sessions 070118	Session 2 & August Special Session 080118
	Session 1 & July Special Sessions 073118	Session 2 & August Special Session 083118
Rate/Amt	Course salary amount from payroll worksheet	
DOS Code	SSC or SST (See payroll worksheet)	

DISTRIBUTION LINE for BONUS(ES)

Index	Your department index (funding source 99100A)	
Sub	0	
Dist %	(leave blank)	
Pay Begin	Session 1 & July Special Sessions	Session 2 & August Special Session
	070118	080118
Pay End	Session 1 & July Special Sessions	Session 2 & August Special Sessions
	073118	083118
Rate/Amt	Bonus amount from payroll worksheet	
DOS Code	SSC or SST (See payroll worksheet)	

- Press F5 to update the transaction, then F10 to enter comments. Comments are required before PPS will allow you to update your action.

Suggested comments:

“Appt to teach (Course) in Summer (1st Session, 2nd Session, or Special Session). One-time by-agreement payment on (Pay Day). Base salary _____, Bonus amount _____.”

- Once you have added your comments, press F5 to complete the transaction.

PPS Entry Screen Fields

Example: Associates-In, Title Code 1506, Session 1

The screen is divided into 3 sections.

The tables below show the fields that need to be completed. All other fields are left blank.

Body	
Field Name	Field Data
Last Name	Triton
First Name	Luke
Emp Stat	A
Pri Pay	MO
Appointment Line	
Appt	10
Pgm	A
Typ	5
Appt Begin	070118
Appt End	080418
Dept	000987
Title	1506
% Full	0.50
F/V	F
Ann/Hr	4361
Rt	B
Sch	MO
Time	N
LV	N
Distribution Line	
Actions	11
Index	Your dept. index
Fund	99100A
Sub	0
PayBeg	070118
PayEnd	073118
Rate/Amt	4361
DOS	SST

Note

For all other Instructors of Record (Non-Assoc-In) use:

Appt Begin – 061618
Appt End - 092318

PAN Comments	
Field Name	Field Data
Status	Associate-In
Appt %	50%
Session	1st
Course Dates	07/02/18 – 08/4/18
Course Salary	\$4,361
Contact/Ext	Sue x41122

Sample PPS Screens – Instructors of Record

Title Code 1100 – PROF-AY
 1st Session (7/2/18-8/4/18) - Pay date 8/1/18

```

PPEARCB-E1595          SD EDB Entry/Update
07/16/18  22:19:18    Appts./Distributions-Condense      Userid:  SDAPORWY
ID: 000110000  Name: WILSON, JACK          Emp Stat:  A      Pri Pay:  MO
      PAF Gen No: 12B                      Stu/Reg:  _      Page 1 of 4
Appt  Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End  Dur  Dept  FLSA
 30   _____ A   S   _____ 061618     092318     _____ 000207
Title                                     Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
1103  PROF-AY-1/9                        _   .50   F   9488.00      B  MQ  N  N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg  PayEnd  Step  OA  Rate/Amt  DOS  PRQ  D  W
31  THEXXXX  99100A 0  _____ 070118  073118  _____ 9248.00  SSC  _____
32  THEXXXX  99100A 0  _____ 070118  073118  _____ 240.00  SSC  _____

Next Func:  _____ ID:  _____ Name:  _____ SSN:  _____
    
```

PAN Comments

PROF-AY, 50%, 1st Session
 Course Dates: 7/2/18-8/4/18
 Course Payment: \$9,248, Enrollment Bonus \$240
 Sue x41122

Title Code 1608 – Lecturer SOE
2nd Session (8/6/18-9/8/18) - Pay date 8/31/18

```

PPEARCB-E1595          SD EDB Entry/Update
07/20/18  22:19:18    Appts./Distributions-Condense      Userid: SDAPORWY
ID: 100333333  Name: SESSIONS, MARK          Emp Stat:  A      Pri Pay: MO
      PAF Gen No: 128          Stu/Reg:  _      Page  1 of  4
Appt  Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End  Dur  Dept  FLSA
 50    _____  A    5    _____  061618    092318    _____  002231
Title                                     Grade %Full  F/V  Ann/Hr  Rate  Rt  Sch  Time  Lv
1608  LECT SOE-AY-1/9                    _____  1.00  E    10868.00  B  MQ  N    N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg  PayEnd  Step  OR  Rate/Amt  DOS  PRQ  D  W
 51  PPP1754  99100A  0  _____  080118  083118  _____  5434.00  SSC  _____
 52  PPP1754  99100A  0  _____  080118  083118  _____  5434.00  SSC  _____

Next Func:  _____  ID:  _____  Name:  _____  SSN:  _____
    
```

PAN Comments

Lecturer SOE, 100%, 2nd Session
 Course Dates: 8/6/18-9/8/18
 Two Course Payments: \$5434, \$5434
 Total Payment: \$10,868
 Sue x41122

Title Code 1550 – Lecturer NSF
1st Session (7/2/18-8/4/18) - Pay date 8/1/18

```

PPEAPCB-E1595          SD EDB Entry/Update
07/20/18 21:25:10      Appts./Distributions-Condense      Userid: SDAPORWY
ID: 000110000      Name: SMITH, SUMMER          Emp Stat: A      Pri Pay: MO
      PAF Gen No: 120          Stu/Reg:         Page 1 of 4
Appt  Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End Dur Deot  FLSA
 20    _____ A   S   _____ 061618     092318     000207
Title                               Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
1550 LECT IN SUMMER SESSION      _____ .50  E  4539.00  B MO N N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg PayEnd Step OA  Rate/Amt DOS PRQ D W
21  THEXXXX 99100A 0  _____ 070118 073118  _____ 4539.00  SST  _____
_____
_____
_____
_____
Next Func: _____ ID: _____ Name: _____ SSN: _____

```

PAN Comments

Lecturer NSF, 50%, 1st Session
 Course Dates: 7/2/18-8/4/18
 Course Payment: \$4,539
 Sue x41122

Title Code 1506 – Associate-In
1st Session (7/2/18-8/4/18) - Pay date 8/1/18

```

PPEAPCB-E1595          SD EDB Entry/Update
07/20/18 22:23:15      Appts./Distributions-Condense      Userid: SDAPORWY
ID: 012345678      Name: TRITON, LUKE          Emp Stat: A      Pri Pay: MO
      PAF Gen No: 12B          Stu/Reg:         Page 1 of 4
Appt  Actions Pgm  Typ Bas Pd Ovr  Aopt Begin  Aopt End Dur Deot  FLSA
 10    _____ A    S          070118    080418    000987
Title                                Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
1506 ASSOC IN -AY-1/9-GSHIP         .50 F 4361.00    B MO N N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg  PayEnd  Step  OA  Rate/Amt  DOS  PRQ  D  W
 11  MYFUND 99100A  0  _____  070118 073118  _____  _____  4361.00  SST  _____

Next Func: _____ ID: _____ Name: _____ SSN: _____

```

PAN Comments

Associate-In, 50%, 1st Session
 Course Dates: 7/2/18-8/4/18
 Course Payment: \$4,361
 Sue x41122

Instructional Support

Summer Session block funds departments to provide instructional support for Summer Session courses.

Block funding is similar to the TA Allocation formula for Fall/Winter/Spring, with the formula adjusted for the shorter Summer Session term. See the [Summer Session Guidebook](#) for details.

- Departments are responsible for hiring Teaching Assistants, Readers, and Tutors.
- Departments are also responsible for PPS entry and timekeeping.

Academic Student Employees (ASE) - Compensation

The Graduate Division website lists the job descriptions and pay rates for Academic Student Employees (ASE).

- ASE job descriptions/duties - <http://grad.ucsd.edu/financial/employment/ase-opportunities.html>
- Pay rates - <http://grad.ucsd.edu/files/financial/acad-pay/STURATES1718.pdf>

Title Codes for UCSD Students

Title Code	Title	Pay Rate	
2310	Teaching Assistant (TA)	\$31.29/hr	
2850	Reader	Graduate Student	15.78/hr
		Undergraduate Student	\$15.00/hr
2860	Tutor	Graduate Student	\$19.49/hr – Single Session \$23.38/hr – Group Session
		Undergraduate Student	\$15.00/hr – Single Session \$17.97/hr – Group Session –OR- Tutor serving as an Instructional Apprentice (IA)
		Postdoctoral Tutors	\$24.00/hr – Single Session \$28.77/hr – Group Session

Single Session is one-on-one

Group Session is three or more students

Title Codes for Non-UCSD Students

Non-students are hired by exception. Graduate Division Dean approval is required.

Title Code	Title	Pay Rate
2500	Reader	Use Graduate Reader Rate if hold baccalaureate
2510	Tutor (Serving in role of TA or tutor)	Use Graduate TA or Tutor rate if holds baccalaureate

EXAMPLES – 2018 Summer Session Payments for Academic Student Employees (ASE)

Sessions 1 & 2 – Five Week Courses (Standard length)

- Department can hire at any percentage.
- 100, 50, 33, and 25 are examples of the most popular percentages of time.
- The table below lists percentages for one 5-week Summer Session course.

Based on Student Academic Title Rates Effective 10/1/17

<http://grad.ucsd.edu/files/financial/acad-pay/STURATES1718.pdf>

Title	Percent Time	Total Hours	Amount Paid
Teaching Assistant	100%	200 hrs.	\$6,258
Effective hourly rate = \$31.29/hr.	50%	100 hrs.	\$3,129
	33%	66 hrs.	\$2,065
	25%	50 hrs.	\$1,565
Reader - Graduate	100%	200 hrs.	\$3,156
\$15.78/hr.	50%	100 hrs.	\$1,578
	33%	66 hrs.	\$1,041
	25%	50 hrs.	\$789
Reader - Undergraduate	100%	200 hrs.	\$3,000
\$15.00/hr.	50%	100 hrs.	\$1,500
	33%	66 hrs.	\$990
	25%	50 hrs.	\$750
Tutor - Graduate	100%	200 hrs.	\$3,898
Single Session: \$19.49/hr.	50%	100 hrs.	\$1,949
	33%	66 hrs.	\$1,286
	25%	50 hrs.	\$975
Tutor - Graduate	100%	200 hrs.	\$4,676
Group Session: \$23.38/hr.	50%	100 hrs.	\$2,338
	33%	66 hrs.	\$1,543
	25%	50 hrs.	\$1,169
Tutor - Undergraduate	100%	200 hrs.	\$3,000
Single Session: \$15.00/hr.	50%	100 hrs.	\$1,500
	33%	66 hrs.	\$990
	25%	50 hrs.	\$750
Tutor - Undergraduate	100%	200 hrs.	\$3,594
Group Session: \$17.97/hr.	50%	100 hrs.	\$1,797
	33%	66 hrs.	\$1,186
	25%	50 hrs.	\$899

Special Sessions - 3, 8, & 10 Week Courses

- Departments can hire at any percentage.
- **100, 50, 33,** and **25** are examples of the most popular percentages of time.
- The table below lists percentages for one non-5-week Summer Session course.

Based on Student Academic Title Rates Effective 10/1/17

<http://grad.ucsd.edu/files/financial/acad-pay/STURATES1718.pdf>

Title	Percent Time	# of Weeks	Hrs/Wk	Total Hours	Amount Paid
Teaching Assistant	100%	3	40	120 hrs.	\$3,755
Effective hourly rate = \$31.29/hr.	50%	3	20	60 hrs.	\$1,877
	33%	3	13	39 hrs.	\$1,220
	25%	3	10	30 hrs.	\$939
Reader - Graduate	100%	10	40	400 hrs.	\$6,312
\$15.78/hr.	50%	10	20	200 hrs.	\$3,156
	33%	10	13	130 hrs.	\$2,051
	25%	10	10	100 hrs.	\$1,578
Reader - Undergraduate	100%	8	40	320 hrs.	\$4,800
\$15.00/hr.	50%	8	20	160 hrs.	\$2,400
	33%	8	13	104 hrs.	\$1,560
	25%	8	10	80 hrs.	\$1,200
Tutor - Graduate	100%	3	40	120 hrs.	\$2,339
Single Session: \$19.49/hr.	50%	3	20	60 hrs.	\$1,189
	33%	3	13	39 hrs.	\$760
	25%	3	10	30 hrs.	\$585
Tutor - Graduate	100%	3	40	120 hrs.	\$2,806
Group Session: \$23.38/hr.	50%	3	20	60 hrs.	\$1,403
	33%	3	13	39 hrs.	\$912
	25%	3	10	30 hrs.	\$701
Tutor - Undergraduate	100%	3	40	120 hrs.	\$1,800
Single Session: \$15.00/hr.	50%	3	20	60 hrs.	\$900
	33%	3	13	39 hrs.	\$585
	25%	3	10	30 hrs.	\$450
Tutor - Undergraduate	100%	3	40	120 hrs.	\$2,156
Group Session: \$17.97/hr.	50%	3	20	60 hrs.	\$1,078
	33%	3	13	39 hrs.	\$701
	25%	3	10	30 hrs.	\$539

ASE Hiring and Payroll

A signed copy of each appointment letter must be received by the department **before** a student starts working.

TAs

- Monthly payroll
- Sub 0, Fixed in PPS
- Timesheets are not required

Tutors and Readers

- Bi-weekly or Monthly payroll
- Sub 2, Variable in PPS
- Timesheets are required

IMPORTANT: A student cannot be paid monthly and hourly simultaneously because the payroll system will withhold taxes incorrectly. If a student has a monthly appointment as a Teaching Assistant or Associate-In and a Reader or Tutor appointment, the Reader/Tutor appointment must be set up on the **monthly** payroll.

Each academic department determines the percentages of employees' time based on the total number of work hours expected, and should audit instructional support payroll records to ensure that actual hours do not exceed the total projected hours.

Time spent in course preparation, classroom and laboratory teaching, office consultation, and reading student papers should be considered in determining the total hours and percentage of time.

Students who graduate in June 2018 are eligible to work as student employees until September 21, 2018.

Note: International students must have work authorization throughout their appointment.

GRADUATE STUDENTS AS TAs (2310), TUTORS (2860) AND READERS (2850)

- Graduate students may not exceed a 100% appointment (40 hours per week) for all UCSD commitments.
- The department must enter the salary into timekeeping for any sub 2 Summer Session payments.

Timekeeping

- Graduate students holding a TA title are not required to submit timesheets
- Readers and Tutors are required to submit a timesheet
- The pay schedules must match for all concurrent appointments in PPS.

Separation

- Graduate students should not be separated at the end of the summer unless they have completed their degree and will no longer be employed by UCSD.
- Please contact the Graduate Division at 4-6562 with any questions.

UNDERGRADUATE TUTORS (2860) AND READERS (2850)

Eligibility

- Student must have paid UC Registration fees for Spring quarter prior to working in Summer Session.
- Undergraduate students may not exceed a 100% appointment for all UCSD commitments.

Separation

- Any undergraduate reader or tutor who does not have a promised and contracted appointment for the Fall quarter must be separated in PPS at the end of their appointment using the SEPARATION bundle.
- Please use “**BB – Appointment/contract appointment expired**” as the reason for the separation.

For questions on undergraduate student appointments, please see <http://career.ucsd.edu/undergraduates/get-a-job/index.html>.

Late payroll adjustments will be accepted in Sept for the October 1 pay date.

For late or missed payroll after Sept, please contact the Summer Session Business office for approval before submitting payroll. Summer Session performs fiscal audits and closes books in October.

United Auto Workers (UAW) Contract

Teaching Assistants, Tutors, and Readers are Academic Student Employees (ASEs), covered by the contract with the United Auto Workers (UAW).

Student employees who are new hires or new to the bargaining unit must be provided with the Union Membership Election form, as well as the ASE Description of Duties form, which are available from the Graduate Division, <http://grad.ucsd.edu/>.

PPS Data Entry Guidelines – Graduate Student TAs (2310) and Non-Student Tutors Serving as TAs (2510)

1. Log into PPS
2. Choose a PPS screen or bundle to navigate through screens
 - EAPC for students with an active appointment
 - RHIR for rehiring students who have been separated in PPS
 - HIRE for new hires
3. Enter EAPC, RHIR, or HIRE in the “Next Func” field along with either the employee ID number or name
4. Press F9 or navigate to the “command line” and type “Add A” then press Enter key

APPOINTMENT LINE

Type	5 (Graduate Students are not eligible for benefits.)		
Basis	(leave blank)		
Pd Ovr	(leave blank)		
	Session 1	Session 2	Special Session
Appt Begin	070118	080118	061618
Appt End	080418	090818	092318
Dept	6-digit department code		
Title	Enter title code		
% Full	Enter percentage of time This is a Graduate Division requirement.		
F/V	F (fixed)		
Annually	Enter course salary amount		
Rt	B (By-agreement)		
Sch	MO (Monthly)		
Time	N (no time sheet produced, not necessary)		
Lv	N (No Leave Accrual)		

DISTRIBUTION LINE

Index	Your department index (funding source SOFI 99100A)	
Sub	0	
Dist %	(leave blank)	
Pay Begin	Session 1 & July Special Sessions	Session 2 & August Special Session
	070118	080118
Pay End	Session 1 & July Special Sessions	Session 2 & August Special Session
	073118	083118
Rate/Amt	Course salary amount	
DOS Code	SST	

5. Press **F5** to update the transaction, then **F10** to enter comments. Comments are required before PPS will allow you to update your action.

Suggested comments: “(TA), for (Course), taught by (Instructor of Record), in Summer (1st Session, 2nd Session, or Special Session), and total course salary (\$)”

6. Once you have added your comments, press **F5** to complete the transaction.

PPS Data Entry Guidelines – Graduate and Undergraduate Tutors (2860) and Readers (2850)

1. Log into PPS
2. Choose a PPS screen or bundle to navigate through screens
 - EAPC for students with an active appointment
 - RHIR for rehiring students who have been separated in PPS
 - HIRE for new hires
3. Enter EAPC, RHIR, or HIRE in the “Next Func” field along with either the employee ID number or name
4. Press F9 or navigate to the “command line” and type “Add A” then press Enter key

APPOINTMENT LINE

Type	5 (Graduate & Undergraduate students are not eligible for benefits.)		
Basis	(leave blank)		
Pd Ovr	(leave blank)		
	Session 1	Session 2	Special Session
Appt Begin	070118	080118	061618
Appt End	080418	090818	092318
Dept	6-digit department code		
Title	Enter title code		
% Full	Enter percentage of time		
F/V	V		
Annually	Enter course salary amount		
Rt	B (By-agreement)		
Sch	BW (bi-weekly) or MO (monthly) – Monthly if they have a concurrent monthly appointment.		
Time	A (to produce time sheet)		
Lv	N (No Leave Accrual)		

DISTRIBUTION LINE

Index	Your department index (funding source SOFI 99100A)	
Sub	2 (Must enter total course salary in timekeeping to generate pay)	
Dist %	(leave blank)	
Pay Begin	Session 1 & July Special Sessions	Session 2 & August Special Session
	070118	080118
Pay End	Session 1 & July Special Sessions	Session 2 & August Special Session
	073118	083118
Rate/Amt	Course salary amount	
DOS Code	SST	

5. Press F5 to update the transaction, then F10 to enter comments. Comments are required before PPS will allow you to update your action. Suggested comments:

“(Tutor or Reader), for (Course), taught by (Instructor of Record), in Summer (1st Session, 2nd Session, or Special Session), and total course salary (\$).”
6. Once you have added your comments, press **F5** to complete the transaction.

Sample PPS Screens – Instructional Support

Title Code 2310 – Teaching Assistant (TA)
 1st Session (7/2/18-8/4/18) - Pay date 8/1/18

```

PPEAPC0-E1595          SD EDB Entry/Update          05/04/18 15:39:31
05/04/18 19:35:50      Appts./Distributions-Condense      Userid:
ID:          Name:          Emp Stat: A          Pri Pay: MO
      PAF Gen No: 9          Stu/Reg: Y          Page 3 of 3
Appt  Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End Dur  Dept  FLSA
 40           A    5    _    _      070118      080418      00203
Title
2310 TEACHG ASST-GSHIP          Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
          0.50  F  3129.00          B  MO  N  N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg  PayEnd Step OA  Rate/Amt  DOS  PRQ D W
41
      MYFUND 99100A 0          070118 073118          3129.00          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

TA, Graduate, 50%, Sub 0, 1st Session
 Course Dates: 7/2/18-8/4/18
 Course Payment: \$3,129
 Pay date: 8/1/18

Title Code 2860 – Graduate Tutor
2nd Session (8/6/18-9/8/18) - Pay date 8/31/18

Readers and Tutors are Sub 2 and are required to submit a timesheet. Calculate the hours worked, multiply by the hourly rate, and 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          07/20/18 15:39:31
07/20/18 19:35:50      Appts./Distributions-Condense  Userid:
ID:                    Name:                        Emp Stat: A      Pri Pay: MO
PAF Gen No: 9          Stu/Reg: Y      Page 3 of 3
Appt  Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End Dur  Dept  FLSA
40    A      5    _  _  _  080118  090818  _  00203
Title                                Grade %Full F/V Ann/Hr Rate  Rt Sch  Time Lv
2860 TUT-GSHIP                       0.25  V  1169.00  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  _  _  080118 083118  _  1169.00  SST  _  _  _

Next Func:  ID:  Name:  SSN:
U0001 Input accepted
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 7-Backward 9-Jump
  
```

BW for bi-weekly

PAN Comments

Tutor, Graduate, 25%, Sub 2, 2nd Session
 Course Dates: 8/6/18-9/8/18
 Course Payment: \$1,169
 Pay date: 8/31/18

Title Code 2850 – Graduate Reader
2nd Session (8/6/18-9/8/18) - Pay date 8/31/18

Readers and Tutors are Sub 2 and are required to submit a timesheet. Calculate the hours worked, multiply by the hourly rate, and 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          05/04/18 15:39:31
05/04/18 19:35:50      Appts./Distributions-Condense      Userid:
ID:                    Name:                    Emp Stat: A      Pri Pay: MO
PAF Gen No: 9          Stu/Reg: Y      Page 3 of 3
Appt  Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End Dur  Dept  FLSA
40      A      5      —      —      080118      090818      —      00203
Title                    Grade %Full F/V Ann/Hr Rate  Rt Sch  Time Lv
2850 READER-GSHIP        —  0.25  V  789.00      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  —      —      080118 083118      —      789.00      SST

Next Func:  ID:  Name:  SSN:
U0001 Input accepted
==>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 7-Backward 9-Jump
    
```

BW for bi-weekly

PAN Comments

Reader, Graduate, 25%, Sub 2, 2nd Session
 Course Dates: 8/6/18-9/8/18
 Course Payment: \$789
 Pay date: 8/31/18

APPENDIX - Instructions for PPS Corrections

Retroactive Payments

If a payment is entered into PPS after the payroll deadline, the error is corrected by processing a retroactive PPS entry.

- PAN comments should state that the entry is retroactive and affects pay to alert Payroll that a payment must be issued.
- It is recommended to email the appropriate Payroll analyst to notify them that a retro payment is needed.
<https://blink.ucsd.edu/sponsor/BFS/divisions/payroll/contacts.html>
- All PPS retroactive changes affecting pay require an additional 5 working days to process.

EXAMPLE

60	1203 PROFESSOR - ACADEMIC YEAR 1/9	101233 BEST COLLEGE	5-Acad	A-Acad	Grd:
06/16/18-09/23/18	0.50% Fix	12120.00 B MO	Lv: N	Cov-A6	Bas/Pd: 00/00
61	XXX2006-99100A-0 SUMMER SESSION		SSC	ASC-SUM	SESS-AMT-DCP
07/01/18-07/31/18	0.0000%	10000.00	St/OA:	WSP:	Prq:
62	XXX2006-99100A-0 SUMMER SESSION		SSC	ASC-SUM	SESS-AMT-DCP
07/01/18-07/31/18	0.0000%	2120.00	St/OA:	WSP:	Prq:

PAN Comments

Retroactive Late payment, please issue on next pay date
Appt. to teach MMW5 in 1st Session.
Course Salary 10,000; Bonus \$2,120.
Name/phone extension

Error Correction – Payment Previously Issued Incorrectly

When an employee has received an incorrect payment, the error must be corrected in PPS and discussed with the employee. If a payback is necessary, Payroll must also be contacted to discuss repayment options.

2 Types of Retroactive Entry: Clear Dated and Stale Dated

1. Clear Dated Retroactive Entry

The appointment and distribution information still exists in PPS for revision.
To correct the error, new information must be added and incorrect information deleted from PPS.

2. Stale Dated Retroactive Entry

Past information in PPS has fallen off and is no longer visible in PPS.
To correct the error, new appointment and distribution lines must be re-created providing only correct information.

Once PPS is updated for a retroactive adjustment, Payroll will reverse the incorrect payment and issue a new payment.

- If the error is an **underpayment**, the difference is issued to the employee.

- If the error is an **overpayment**, the employee must then reimburse the University. Reimbursements may be corrected by having the employee write a check back to the University or by Payroll deducting the overpayment from a future payment (if applicable).

Clear Dated PPS Steps

- If the appointment information is correct but the distribution is not, delete the incorrect distribution and add a new correct distribution.
- If the appointment information is incorrect but the distribution lines are correct, create a new appointment, copy the existing distributions to the new appointment and delete the old appointment and distribution lines. Please note this type of correction will not issue any pay.
- If the appointment and distribution lines are incorrect, create a new appointment and distribution lines with correct information and delete the old ones.

Please note, it is important that the error be reversed in this manner. It is not appropriate to type over the incorrect information.

EXAMPLE 1 - Clear Dated Underpayment

Below a Professor was paid at too low a class rate and bonus. To correct the underpayment, the old distributions (61 and 62) were deleted and new distributions (63 and 64) were added at the correct rates.

Please note, it is never appropriate to create a new distribution with only the difference in pay.

```
60 1203 PROFESSOR - ACADEMIC YEAR 1/9 200233 TOP COLLEGE 5-Acad A-Acad Grd:
06/16/18-09/23/18 0.50% Fix 7620.00 B MO Lv: N Cov-A6 Bas/Pd: 00/00
```

```
DELETE DIST 61 XXX2006-99100A-0 SUMMER SESSION- SSC ASC-SUM SESS-AMT-DCP
07/01/18-07/31/18 5000.00 St/OA: WSP: Prq:
```

```
DELETE DIST 62 XXX2006-99100A-0 SUMMER SESSION- SSC ASC-SUM SESS-AMT-DCP
07/01/18-07/31/18 2000.00 St/OA: WSP: Prq:
```

```
ADD DIST 63 XXX2006-99100A-0 SUMMER SESSION- SSC ASC-SUM SESS-AMT-DCP
07/01/18-07/31/18 5500.00 St/OA: WSP: Prq:
```

```
ADD DIST 64 XXX2006-99100A-0 SUMMER SESSION- SSC ASC-SUM SESS-AMT-DCP
07/01/18-07/31/18 2120.00 St/OA: WSP: Prq:
```

PAN Comments

Clear Dated Retroactive Adjustment Affects Pay

Employee underpaid, please issue difference on next paycheck

Dist 61 deleted at \$5000.00, Dist 63 added at correct rate of \$5500.00

Dist 62 deleted at \$2000.00, Dist 64 added at correct rate of \$2120.00

Name/phone extension

EXAMPLE 2 - Clear Dated Overpayment

The following example is for a Professor who was overpaid on the bonus portion of the payment only. To correct the overpayment, the old distribution (62) is deleted and a new distribution (63) is added at the correct rate.

Please note, overpayments must be discussed with Payroll to confirm if the net or gross amount must be paid back and how payback will be handled.

60 1203 PROFESSOR - ACADEMIC YEAR 1/9 300333 SEVENTH COLLEGE 5-Acad A-Acad Grd:
06/16/18-09/23/18 0.50% Fix 7367.00 B MO Lv: N Cov-A6 Bas/Pd: 00/00

DIST 61 XXX2006-99100A-0 SUMMER SESSION- SSC ASC-SUM SESS-AMT-DCP
07/01/18-07/31/18 5247.00 St/OA: WSP: Prq:

DELETE DIST 62 XXX2006-99100A-0 SUMMER SESSION- SSC ASC-SUM SESS-AMT-DCP
07/01/18-07/31/18 2120.00 St/OA: WSP: Prq:

ADD DIST 63 XXX2006-99100A-0 SUMMER SESSION- SSC ASC-SUM SESS-AMT-DCP
07/01/18-07/31/18 2000.00 St/OA: WSP: Prq:

PAN Comments

Clear Dated Retroactive Adjustment Affects Pay - Overpayment

Employee overpaid on bonus only, emp. will write the university a check for the difference

Dist 62 deleted at \$2120.00, dist 63 added at correct rate of \$2000.00

Name/phone extension

Stale Dated PPS Steps

Overpayments and underpayments are entered in PPS as if they were brand new appointments for stale dated adjustments. Since all the information has dropped off the system, you must re-create the appointment and distribution lines listing the correct information to be paid.

PAN comments must clearly state what the adjustment is.

Please note, overpayments must be discussed with Payroll to confirm if the net or gross amount must be paid back or deducted from a future check and how payback will be handled.

See PAN examples below:

PAN for Stale Dated Underpayment

Stale Dated retroactive adjustment affects pay - underpayment

Initial payment issued at \$____, should have been \$_____

Please issue difference in pay on next check

Name/phone extension

PAN for Stale Dated Overpayment

Stale Dated retroactive adjustment affects pay - overpayment

Initial payment issued at \$____, should have been \$_____

Employee to write a check to back to the Univ. for overpayment

Name/phone extension