

# Payroll Training Summer 2018

March 15, 2018



UC San Diego

# 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 (Associates-In & Instructional Support)  
Becky Burrola, Graduate Division, x43727  
Courtney Aguila, Graduate Division, x 46562

Summer  
Session has  
moved to  
SERF!



## Summer Session Contacts

**Lisa Bargabus**

Faculty hiring & payroll  
X 25064

**Matt Sapien**

Course Scheduling  
X 44744

## Summer Session 2018

- Session 1        7/2/18 – 8/4/18
- Session 2        8/6/18 – 9/8/18

## Special Sessions

3 Weeks	8 Weeks	10 Weeks
7/2/18 – 7/21/18 7/23/18 – 8/11/18 8/13/18 – 9/1/18	7/2/18 – 8/25/18	7/2/18 – 9/8/18

Students will start enrolling in courses 4/16/18

## What's New for 2018?

- Payroll Worksheets will continue to be uploaded to SharePoint.
- Unit 18 lecturers teaching independent study courses?
- Appointment File processing is a bit delayed – new DUE and Summer Session office move.
- Visiting instructors will need FERPA training. (Valid for 3 years.)
- Reminder: 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](mailto:dechristensen@ucsd.edu).

# What's New for 2018?

## 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
- Triton Edge
- Triton Freshman Scholars (5 & 8 Week programs)
- Triton Sophomore Scholars

Success Bonus (\$500 per week) will NOT be included in payroll worksheets. (Retro payment at a later date.)

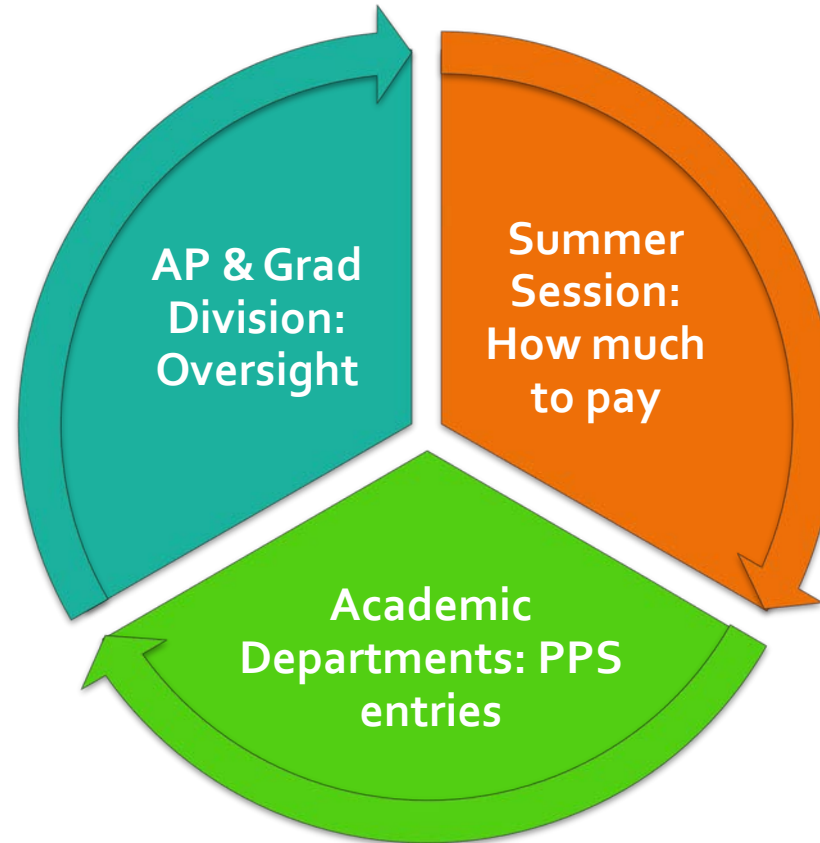
# Instructor Names on the Schedule of Classes

- Summer Session cannot add an instructor to the Schedule of Classes unless they have an active teaching appointment in PPS (and ISIS).
- Some teaching appointments may need to be entered into PPS before the payroll worksheets are ready.
- You will be contacted by Matt ([summer-scheduling@ucsd.edu](mailto:summer-scheduling@ucsd.edu)) if we need an appointment entered early.

Summer Session  
Payroll

Instructors of  
Record

## Summer Session Payroll Requires Teamwork!

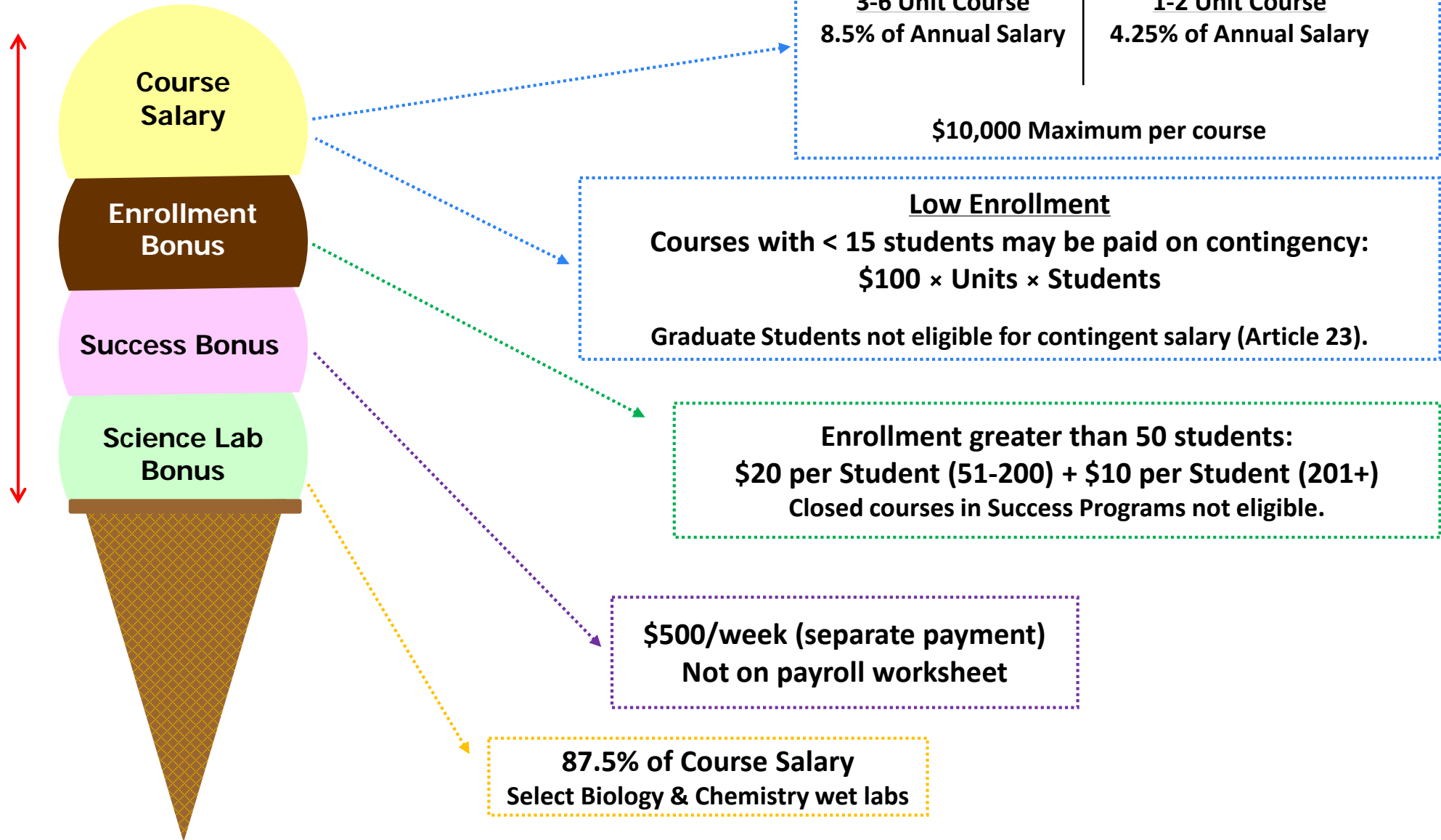




# Summer Compensation for Instructors is Complicated!

**MAXIMUM ALLOWED**  
33% (or 3/9) of UC Annual Salary

**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.



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](mailto:summer-payroll@ucsd.edu)**.

# SAMPLE PAYROLL WORKSHEET

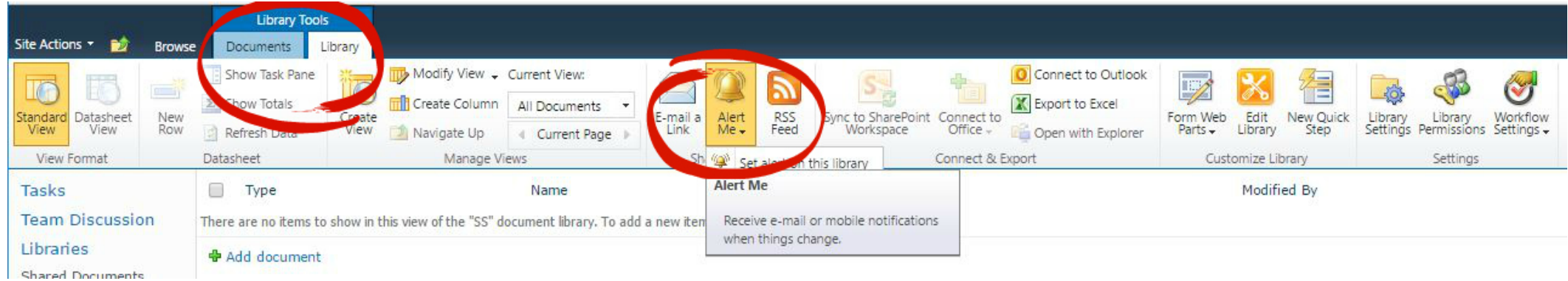
Date: 8/16/18  
 Department: Cognitive Science  
 Summer Session Payroll Index # MYINDEX  
 Fund: 99100A  
 Sub: 0

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 7/9/18	%Full	Paydate Begins	Paydate Ends	Course Salary	Enr Bonus	Total Salary	Annual 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	\$51,302
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	\$127,000
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	\$53,402
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	\$117,800
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 7/11/18	2nd Snapshot 8/13/18	%Full	Paydate Begins	Paydate Ends	Course Salary	Enr Bonus	Total Salary	Annual 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	\$114,813
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	\$114,813
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	\$53,402
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	\$51,302
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 courses.																		
8/16/18 - Enrollment bonuses and adjusted total salaries are highlighted.																		

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!

SS - New Alert

OK Cancel

**Alert Title**  
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Summer Session Payroll Worksheet

**Send Alerts To**  
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:  
you@ucsd.edu; lbargabus@ucsd.edu

**Delivery Method**  
Specify how you want the alerts delivered.

Send me alerts by:

E-mail lbargabus@ucsd.edu  
 Text Message (SMS)   
 Send URL in text message (SMS)

**Change Type**  
Specify the type of changes that you want to be alerted to.

Only send me alerts when:

All changes  
 New items are added  
 Existing items are modified  
 Items are deleted

**Send Alerts for These Changes**  
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

Anything changes  
 Someone else changes a document  
 Someone else changes a document created by me  
 Someone else changes a document last modified by me

**When to Send Alerts**  
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

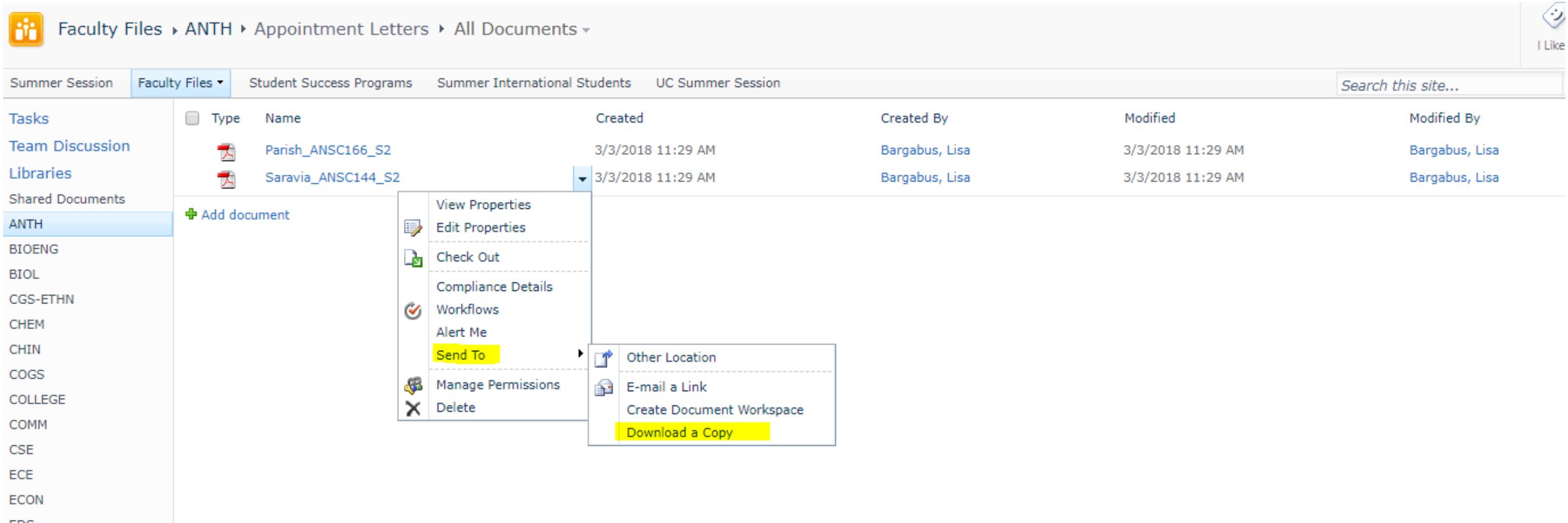
Send notification immediately  
 Send a daily summary  
 Send a weekly summary

Time:  
Monday 1:00 PM

OK Cancel



# SharePoint Tip – Hover your mouse on a file name to download a copy.



Faculty Files ▸ ANTH ▸ Appointment Letters ▸ All Documents ▾

Summer Session Faculty Files ▾ Student Success Programs Summer International Students UC Summer Session

Search this site...

Type	Name	Created	Created By	Modified	Modified By
	Parish_ANSC166_S2	3/3/2018 11:29 AM	Bargabus, Lisa	3/3/2018 11:29 AM	Bargabus, Lisa
	Saravia_ANSC144_S2	3/3/2018 11:29 AM	Bargabus, Lisa	3/3/2018 11:29 AM	Bargabus, Lisa

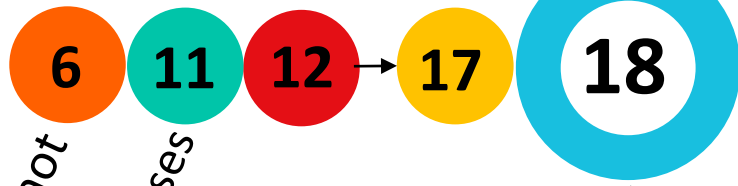
Tasks  
Team Discussion  
Libraries  
Shared Documents  
ANTH  
BIOENG  
BIOL  
CGS-ETHN  
CHEM  
CHIN  
COGS  
COLLEGE  
COMM  
CSE  
ECE  
ECON

Context Menu for Saravia\_ANSC144\_S2:

- View Properties
- Edit Properties
- Check Out
- Compliance Details
- Workflows
- Alert Me
- Send To
  - Other Location
  - E-mail a Link
  - Create Document Workspace
  - Download a Copy
- Manage Permissions
- Delete

# Timeline for Session 1 & July Special Session Payroll Worksheets

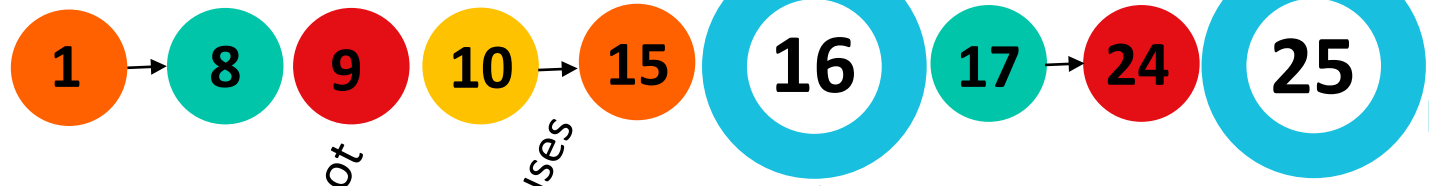
JUNE



Payroll Worksheet

Course Salaries  
(contingent if <15 students)

JULY



Final Payroll Worksheet

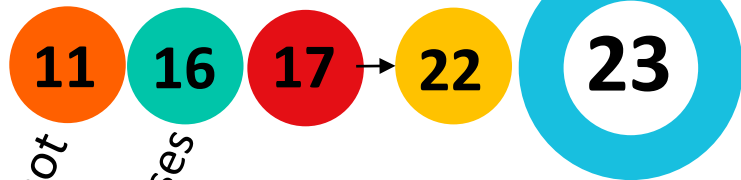
PPS Deadline

8/1/18  
PAYDATE

Final Course Salaries  
Enrollment Bonuses

# Timeline for Session 2 & August Special Session Payroll Worksheets

JULY



Payroll Worksheet

Course Salaries  
(contingent if <15 students)

AUGUST



Final Payroll Worksheet

PPS Deadline

8/31/18  
PAYDATE

Final Course Salaries  
Enrollment Bonuses



## Useful Stuff you need to know for PPS

- 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

SSC	SST
Hint: SECURE	Hint: TEMPORARY
UC Ladder Rank Faculty Professor LSOE LPSOE Adjunct Professor	Everyone Else Recall Visiting Prof Lecturer Associate-In

Useful Stuff  
you need to  
know for PPS

## Sub Categories

Sub 0	Sub 2
All Instructors of Record Teaching Assistant (TA) No timekeeping Flat rate paid	Reader and Tutor Timekeeping required Hourly reported in TAR

```

PPEAPCB-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:  M0
      PAF Gen No:  12B          Stu/Reg:  _    Page  1 of  4
Appt  Actions Pgm  Typ Bas Pd Ovr  Aoot Begin  Aoot End Dur  Deot  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  E  9488.00  _____  B  M0  N  N

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

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

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



PAN Comments

```

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    S    _____  061618   092318   _____  002231
Title
1608  LECT SOE-AY-1/9      _____  1.00  E  10868.00      B  MO  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  _____  _____  _____  _____
  52  PPP1754  99100A  0  _____  080118  083118  _____  _____  5434.00  _____  _____  _____  _____

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

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



PAN Comments

```

PPEAPC0-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:  M0
      PAF Gen No:  120                Stu/Reg:  _      Page   1 of   4
Appt   Actions Pgm  Typ Bas Pd Ovr  Appt Begin  Appt End Dur  Dept   FLSA
  20      _____  A  5  _____  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 MQ  N  N

Dist No
Actions Index  Fund Sub FTE  Dis %  PayBeg PayEnd Step  OR  Rate/Amt  DOS  PRQ  D  W
21  THEXXX 99100A 0  _____  070118 073118  _____  _____  4539.00  _____  SST  _____

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

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



# Summer Session Payroll

# Graduate Student Employment

## General Reminders

- Only approved AI appointments flagged by Matt should be entered into PPS. All other summer graduate student payroll entries are to be entered after mid-May.
- Obtain home department approval.
- Check eligibility (academic and financial).
- Check work permit end date (F1: see I-20; J1: see DS-2019).
- Add new appointment line in PPS when changing Title Code, step, rate, or percentage.

# Summer Session Payroll

# Graduate Student Employment

## General Reminders

- 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.
- Add “E” for Employee Relations Code on EPER to ensure correct employee unit and representation codes.



```

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: M0
      PAF Gen No: 128          Stu/Reg:          Page 1 of 4
Appt  Actions Pgm  Typ Bas Pd Ovr  Aoot Begin  Aoot 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 M0  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: _____
    
```

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



PAN Comments

```

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                                     Grade %Full F/V Ann/Hr Rate  Rt Sch  Time Lv
2310 TEACHG ASST-GSHIP                _  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
    
```

Teaching Assistant, 50%, Sub 0, 1<sup>st</sup> Session  
 Course Dates: 7/2/18-8/4/18  
 Course Payment: \$3,129  
 Pay date: 8/1/18



**Title Code 2860 – Graduate Tutor • 2<sup>nd</sup> 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
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

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

PAN Comments

**Title Code 2850 – Graduate Reader • 2<sup>nd</sup> 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

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

PAN Comments

## Summer Session Contacts

### Lisa Bargabus

Faculty hiring & payroll

X 25064

[summer-payroll@ucsd.edu](mailto:summer-payroll@ucsd.edu)

### Matt Sapien

Course Scheduling

X 44744

[summer-scheduling@ucsd.edu](mailto:summer-scheduling@ucsd.edu)

### Becky Arce

Summer Session Director

X47074

[barce@ucsd.edu](mailto:barce@ucsd.edu)

# Questions?

We are happy to help!



UC San Diego