SUMMER 2018 PROCEDURE

GENERAL INFORMATION

- Please refer to the Summer 2018 Appointment Type Matrix which is a quick reference guide to the various types of appointments applicable for Summer Term 2018.

- All confirmed appointments must be delivered to Academic Personnel by June 8, 2018.

- Dates of Summer Term Teaching Assignments:

<table>
<thead>
<tr>
<th>Type</th>
<th>Dates</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st 5-week summer assignments</td>
<td>June 25 to July 27</td>
<td>24</td>
</tr>
<tr>
<td>2nd 5-week summer assignments</td>
<td>July 30 to August 31</td>
<td>25</td>
</tr>
<tr>
<td>8-week summer assignments</td>
<td>June 25 to August 17</td>
<td>39</td>
</tr>
<tr>
<td>10-week summer assignments</td>
<td>June 25 to August 31</td>
<td>49</td>
</tr>
</tbody>
</table>

- For **Self Support (teaching assignments)** - **Job Code 2357** - Instructional Faculty, Summer Session – Extension

- For **State Support (non-teaching assignments)** - **Job Code 2368** - Instructional Faculty, Extra Quarter Assignment (IAF-administrative, AT-assigned time, OSF-reimbursed time assignments)

**Non-teaching Assignment Types**

- Self-Support assigned time given by Extended Education that is directly related to Summer Term instruction will be processed as **2357** job code appointments.

- State-Support non-teaching assignments (IAF/AT/OSF) will be processed as **2368** job code appointments.

- Administrative Time (IAF) generally limited to administrative assignments for AY Department Chairs - complete **AP107A** and process as job code **2368** appointments

- Assigned Time - complete **AP107B** for either self-support or state-support appointments and identify assigned time type to distinguish whether assigned time is related to Summer Term 2018 instruction, to instruction during other quarters, or to non-teaching purposes

  - Assigned time codes 11 & 15 directly related to Summer 2018 instruction should be processed using self-support **2357** appointments only.
  - All other assigned time codes not directly related to Summer Term 2018 teaching will be processed as state-supported **2368** appointments only

- Reimbursed (Release) Time (OSF) – complete **AP107C** for reimbursed time, i.e. grant-funded release time, and process as job code **2368** appointments

- The teaching assignment will be paid according to the Summer Term pay schedule:

  **Job code 2357** - Self-Support assignments will generate only **ONE** paycheck after completion of the summer assignment(s). Those teaching any combination of the 1st 5-week, 2nd 5-week, 8-week and/or a 10-week assignment will receive a single paycheck for the combined assignments after the conclusion of their last session taught. **Compensation aggregated and disbursed into one paycheck may affect the amount of taxes withheld. Employees should consult a tax professional for tax advice.**

Paychecks will be disbursed on the following dates:

- August 3 for 1st 5-week (grades due July 31)
- September 12 for 2nd 5-week (grades due September 5)
- August 24 for 8-week (grades due August 28)
- September 12 for 10-week (grades due September 11)
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Job code 2368 - State Support non-teaching assignments will only be made on the basis of the ten week summer session and will receive THREE paychecks. Paychecks will be disbursed on the following dates:

- July 31
- August 30
- September 12

Note: It is possible for an employee to have both a teaching assignment (2357) and a non-teaching assignment (2368) in the same session as long as the total assignment does not exceed full-time. They will have two separate assignments and will be paid separately for each assignment.

• Vice Provost for International, Graduate, and Extended Education will review and approve final class offerings based on enrollment and instructional cost.

• Appointment processing of teaching appointments using self-support job code 2357 - Academic Personnel will prepare the faculty appointment letter (unless otherwise stated) to be signed by the Vice Provost for International, Graduate, and Extended Education (IG&EE) consistent with AP101S (Self-Support) form.
  o Extended Education will send the appointment letter to the faculty member and forward signed acceptance of appointment letter to colleges for placement in the respective faculty member’s personnel action file.

• All teaching appointments are contingent upon meeting enrollment targets prior to the third class meeting. When courses are cancelled prior to the third class meeting, faculty will be paid the pro-rata amount for number of class days taught. Upon course cancellation, college deans will immediately inform the affected faculty member and Extended Education via email (summer@calpoly.edu) and send a revised AP101S (Self-Support) Form to Academic Personnel. Faculty will be sent a notice of course cancellation and/or amended appointment letter as appropriate via correspondence prepared by Academic Personnel and signed by Vice Provost IG&EE.

• Appointment processing of non-teaching appointments using state-support job code 2368 - the dean’s office will prepare the faculty appointment letter to be signed by the college dean.
  o The dean’s office will forward signed offer letter, AP101S-NonInstructional (State Support) form, and copy of appropriate AP107 form to the Academic Personnel office, which will send the offer letter to the faculty.

• Retired employees
  o Retired employees cannot be rehired within 180 days of their retirement date (if their retirement date was within the prior 180 days, the retiree cannot be rehired for compensation at any CalPERS covered agency, including self-support (Extended Education).

• In order for a retiree to be appointed in Summer Term, their retirement date must be on or prior to December 24, 2017.

• The following types of deductions are NOT allowed:
  o Health Benefits
  o 403B
  o 457
  o 401K
  o Union Dues
SUMMER 2018 PROCEDURE

COLLEGE/DEPARTMENT

- All confirmed assignments are due to Academic Personnel by Friday, June 8, 2018.

- Job code 2357 - College/Department will prepare and send AP101S-Instructional (Self Support) form and copy of Term Workload page for CONFIRMED assignments documenting specifics of appointment.

- Job code 2368 - College/Department will prepare and send AP101S-NonInstructional (State Support) and copy of appropriate AP107 form for non-teaching assignments to Academic Personnel.

- Background checks will be required for any new hire or rehires with more than 12 months break in service per the new CSU policy. Departments must submit background check requests to Academic Personnel as early as possible.

All self-support appointments will reflect faculty salary as of Spring Term 2018, consistent with the Unit 3 Collective Bargaining Agreement (see FAQs for details).

APPOINTMENTS WITHOUT ADDITIONAL COMPENSATION

- 12 Month faculty members (Tenure/Tenure-Track, Department Head/Chair or Lecturers) - may teach course(s) without additional compensation. Complete AP101S-Instructional section ‘Appts w/o Additional Compensation’ for 12Mo–Ten/TT or DC/DH or for 12Mo-Lecturer.

- Extended Education shall reimburse the college for pro-rata amount of salary for work assigned.

COMPENSATION OPTIONS FOR FACULTY WITH NON-TEACHING ASSIGNMENTS DURING SUMMER TERM

Several options exist for compensating faculty for performing non-teaching duties during Summer Term. Please note that in order for brand new faculty to receive summer appointments of any type, it is generally expected that they will have relocated locally, and they must complete all necessary Payroll intake requirements prior to the start of their summer appointment.

When in doubt regarding which of the options to use for appointing your faculty, please contact Academic Personnel for information or advice.

Extra Quarter Assignment

- State-Supported non-teaching assignments (IAF, AT, OSP) may be processed as 2368 job code (Extra Quarter assignment) appointments for current faculty who were in full-time paid status during Winter and Spring 2018 (2358 job code must be use for new lecturers or those who were not in full-time status.

Special Consultant Appointments During Summer

- Special Consultant appointments may be given to compensate faculty for some types of non-teaching assignments, including duties not related to their faculty position and other assignments outside their primary department. For brand new faculty beginning in September, Special Consultant is one of the few options for a summer non-teaching appointment. Another option is beginning a tenure-track appointment early in job code 2361-Instructional Faculty-12 month, which can be on a part-time basis. Special Consultant assignments are paid at a daily pay rate that may or may not equate to the faculty member’s actual pay rate.

  NOTE: Incoming new faculty who hold Special Consultant appointments in the summer prior to their tenure-track appointment will not be able to access their courses in PolyLearn until the first day of Fall Quarter. An early appointment in job code 2361 avoids this issue.

- The same procedures and policies that are applicable during the academic year also apply during Summer Term, and compensation can be paid from State funds.
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- Special Consultants (job code 4660) are appointed for assignments during Summer Term assignments by completion of the SC100 Special Consultant Appointment and Agreement Form.
- Special Consultants are paid on a monthly basis according to the number of days submitted each month on the SC101 Special Consultant Pay Request, up to the maximum days authorized on the SC100.

ACADEMIC STUDENT APPOINTMENTS

Student employees are allowed to work (up to 40 hours per week) during Summer Term if they are not enrolled or for:
- Undergrads enrolled in 5 units or less in Summer Term, or
- Grad students enrolled in 3 units or less in Summer Term and
- For both undergrads and grad students were enrolled in the previous Spring Term.

During Summer Term 2018 students are limited to working 20 hours per week throughout the entire duration of Summer Term (June 25 – August 31, 2018), regardless of the actual session(s) they are enrolled in.
- Undergrads enrolled in 6 units or more in Summer Term, or
- Grad students enrolled in 4 units or more in Summer Term

Teaching Associates

- College will prepare and send AP101S-Instructional (Self Support) Form documenting specifics of TA appointment to Academic Personnel.
- Academic Personnel will prepare the appointment letter to be signed by the Vice Provost IG&EE.
- TA’s will be assigned to payroll classification code 2354 and paychecks will be issued as follows:
  - June 30
  - July 31
  - August 30
  - September 12
- After conclusion of Summer Term, Extended Education will work with the colleges on the budget reconciliation process to reimburse the college for any Summer Term 2018 TA work.

Graduate Assistants

- College will prepare both the AP101S-Instructional (Self Support) Form and the appointment letter signed by the College Dean and forward both documents to Academic Personnel.
- GA’s are time-based (FTE) appointments
- GA’s will be assigned payroll classification 2355, Range C and paychecks will be issued as follows:
  - July 31
  - August 30
  - September 28
- Since GA’s are not supporting summer instruction, their salary will be paid by the college and their assignments will be exempt from the summer term budget reconciliation process.
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Instructional Student Assistants (ISAs)
- Department will use the ISA101-Summer 2018 form and send completed form to Academic Personnel
- If the work performed is to support a Summer Term 2018 course the compensation of the ISA will be reimbursed to the college through the budget reconciliation process.
- If the work performed is not supporting a Summer Term 2018 course, then the ISA will be paid through college or department funds.

STUDENT REGISTRATION
- April 24 through April 30, 2018, CPREG opens; registration appointment rotations with 16-unit limit
- May 1 through June 20, 2018, open enrollment
- For detailed registration schedule, summer student fees and information please see Office of the Registrar website.
- Detailed Student Fee payment information can be found on the Student Accounts website.
  - Fees due at time of registration
  - Class Cancellation Payment Deadline is June 11, 2018: Students may be dropped from all enrolled classes if Registration Fees are not paid by 4pm (excludes Financial Aid and certain other student groups).

QUESTIONS
<table>
<thead>
<tr>
<th>For pay related questions:</th>
<th>Payroll – Jennifer Hiatt</th>
<th>(6-2605)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Term appointment procedures, process and policy:</td>
<td>Academic Personnel - Carol Sammons Chris Blackburn</td>
<td>(6-5228) (6-5281)</td>
</tr>
<tr>
<td>Summer Term Special Consultant and ISA questions:</td>
<td>Academic Personnel – Nicole Hadley</td>
<td>(6-2841)</td>
</tr>
<tr>
<td>Summer Term and Special Session course, enrollment and compensation questions:</td>
<td>Extended Education - Sandra Harris or <a href="mailto:summer@calpoly.edu">summer@calpoly.edu</a></td>
<td>(6-7657)</td>
</tr>
</tbody>
</table>

REFERENCES (http://www.academic-personnel.calpoly.edu/content/summer)
- Cal Poly Agreement for Summer Quarter Faculty Assignments (effective Summer 2007)
- AP101S-Instructional (Self-Support) Summer 2018 Form
- AP101S-NonInstructional (State-Support) Summer 2018 Form
- Sample Offer Letter for 2368-Extra Quarter Assignment-Summer 2018
- Create a Non-Teaching Summer Qtr Contract BPG 2018
- Summer Term 2018 Position Numbers
- Summer Term 2018 Ineligibility Lists
- Per Unit Rate List provided to the College Dean’s Office