SUMMER 2019 PROCEDURE

- Please refer to the Summer Appointment Type Matrix which is a quick reference guide to the various types of appointments applicable for Summer Term.
- All confirmed appointments must be submitted to Academic Personnel by June 7, 2019.
- Dates of Summer Term Teaching Assignments:

<table>
<thead>
<tr>
<th>Assignment Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st 5-week summer assignments</td>
<td>June 24</td>
<td>July 26</td>
<td>24 days</td>
</tr>
<tr>
<td>2nd 5-week summer assignments</td>
<td>July 29</td>
<td>August 30</td>
<td>25 days</td>
</tr>
<tr>
<td>8-week summer assignments</td>
<td>June 24</td>
<td>August 16</td>
<td>39 days</td>
</tr>
<tr>
<td>10-week summer assignments</td>
<td>June 24</td>
<td>August 30</td>
<td>49 days</td>
</tr>
</tbody>
</table>

SELF SUPPORT (teaching assignments) - Job Code 2357 - Instructional Faculty, Summer Session – Extension

- Self-Support assigned time given by Extended Education that is directly related to Summer Term instruction will be processed as 2357 job code appointments.
- Assigned Time - complete AP107B for self-support assignments:
  - Assigned time codes 11 & 15 directly related to Summer 2019 instruction should be processed using self-support 2357 appointments only
- Vice Provost for International, Graduate, and Extended Education will review and approve final class offerings based on enrollment and instructional cost.
- 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.

APPOINTMENT PROCESSING - College/Department will complete an AP101S-Instructional (Self Support) form in DocuSign and route forward for approvals.

- 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.
  - 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.

PAY SCHEDULE for job code 2357 - Self-Support assignments - only ONE paycheck will generate 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 2 for 1st 5-week (grades due July 30)
- September 10 for 2nd 5-week (grades due September 3)
- August 23 for 8-week (grades due August 27)
- September 10 for 10-week (grades due September 10)
SUMMER 2019 PROCEDURE

- **STATE SUPPORT (non-teaching assignments) - Job Code 2368** - Instructional Faculty, Extra Quarter Assignment or 2358 – Lecturer (IAF-administrative, AT-assigned time, OSF-reimbursed time assignments)
  - State-Support non-teaching assignments (IAF/AT/OSF) will be processed as 2368 or 2358 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 state-support assignments not directly related to Summer Term 2019 instruction, and process as job code 2368 appointments.
  - Reimbursed (Release) Time (OSF) – complete AP107C for reimbursed time, i.e. grant-funded release time, and process as job code 2368 appointments
  - Current faculty who were not in full-time paid status during winter and spring 2019 must use 2358 job code.
  - **APPOINTMENT PROCESSING** of non-teaching appointments using state-support job code 2368 and 2358 - the dean’s office will prepare the faculty appointment letter to be signed by the college dean.
  - 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.

- **PAY SCHEDULE** for job code 2368 and 2358 assignments will be paid on the basis of the ten week summer session.
  - Faculty in job code 2368 will receive THREE paychecks. Paychecks will be disbursed on the following dates:
    - July 30
    - August 29
    - September 10
  - Faculty in job code 2358 will receive FOUR paychecks. Paychecks will be disbursed on the following dates:
    - June 28
    - July 30
    - August 29
    - September 10

**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.

**GENERAL INFORMATION**

- **Retired employees**
  - 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 25, 2018.
SUMMER 2019 PROCEDURE

- The following types of deductions are NOT allowed:
  - Health Benefits
  - 403B
  - 457
  - 401K
  - Union Dues

- 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 2019, consistent with the Unit 3 Collective Bargaining Agreement (see FAQs for details).

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

**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.

- 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 must have been enrolled in the previous Spring Term.

During Summer Term 2019 students are limited to working 20 hours per week throughout the entire duration of Summer Term (June 24 – August 30, 2019), 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
- Academic Personnel will prepare the appointment letter to be signed by the Vice Provost IG&EE.
- TA's are time-based (FTE) appointments
- TA’s will be assigned to payroll classification code 2354.
- **Pay schedule** - paychecks will be issued as follows:
  - June 28
  - July 30
  - August 29
  - September 10
- 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 2019 TA work.

Graduate Assistants
- Colleges prepare both the **AP101S - TA-GA Summer 2019** 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
- **Pay schedule** - paychecks will be issued as follows:
  - July 30
  - August 29
  - September 30
- 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.

Instructional Student Assistants (ISAs)
- Departments will use the ISA101-Summer 2019 form and send completed form to Academic Personnel.
- If the work performed is to support a Summer Term 2019 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 2019 course, then the ISA will be paid through college or department funds.

STUDENT REGISTRATION
- April 24 through April 30, 2019, CPREG opens; registration appointment rotations with 16-unit limit
- May 1 through June 21, 2019, 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 12, 2019: 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>QUESTIONS</th>
<th>Payroll – Jennifer Hiatt</th>
<th>(6-2605)</th>
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<tbody>
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<td>For pay related questions:</td>
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<tr>
<td>Summer Term appointment procedures, process and policy:</td>
<td>Academic Personnel -</td>
<td>(6-5228)</td>
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<td>Carol Sammons or Chris Blackburn</td>
<td>(6-5281)</td>
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<td>Summer Term Special Consultant and ISA questions:</td>
<td>Academic Personnel –</td>
<td>(6-2841)</td>
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<tr>
<td></td>
<td>Nicole Hadley</td>
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<tr>
<td>Summer Term and Special Session course, enrollment and compensation</td>
<td>Extended Education -</td>
<td>(6-7657)</td>
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<tr>
<td></td>
<td>Sandra Harris or</td>
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<td></td>
<td><a href="mailto:summer@calpoly.edu">summer@calpoly.edu</a></td>
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</tbody>
</table>

## REFERENCES ([http://www.academic-personnel.calpoly.edu/content/summer](http://www.academic-personnel.calpoly.edu/content/summer))

- Cal Poly Agreement for Summer Quarter Faculty Assignments (effective Summer 2007)
- Summer Appointment Type Matrix
- AP101S-Instructional (Self-Support) Assignment Form
- AP101S-NonInstructional (State-Support) Assignment Form
- AP101S-TA-GA Assignment Form
- Sample Offer Letter for 2368-Extra Quarter Assignment
- Create a Non-Teaching Summer Qtr Contract BPG
- Complete AP101S-2357 in DocuSign BPG
- Summer Term Positions 2019
- Summer Term 2019 Ineligibility Lists
- Summer Term 2019 Course Cost Estimator
- Per Unit Rate List provided to the College Dean’s Office