SUMMER 2021 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 4, 2021**.
- Dates of Summer Term Teaching Assignments:

<table>
<thead>
<tr>
<th>Assignment Type</th>
<th>Dates</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st 5-week summer</td>
<td>June 21 to July 23</td>
<td>(24 days)</td>
</tr>
<tr>
<td>assignments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd 5-week summer</td>
<td>June 21 to August 27</td>
<td>(25 days)</td>
</tr>
<tr>
<td>assignments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8-week summer</td>
<td>June 21 to August 13</td>
<td>(39 days)</td>
</tr>
<tr>
<td>assignments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10-week summer</td>
<td>June 21 to August 27</td>
<td>(49 days)</td>
</tr>
<tr>
<td>assignments</td>
<td></td>
<td></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 2021 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 Adobe Sign 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:
    - July 30 for 1st 5-week (grades due July 27)
    - September 7 for 2nd 5-week (grades due August 31)
    - August 20 for 8-week (grades due August 24)
    - September 7 for 10-week (grades due September 7)
SUMMER 2021 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 2021 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 2021 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 AP101S-NonInstructional (State Support) form, the faculty appointment letter, and the appropriate AP107 form and route via Adobe Sign for signature approval.
  
  - Please label the file with the Faculty Name, Department Name - 2358 or 2368 (example: Smith, BIO – 2368) and route for signatures to:
    
    - Department Chair/Head (if not already signed) - AP101S & 107 Form
    - College Dean - AP101S, 107 Form* and faculty appointment letter
    - Academic Personnel - AP101S
    - Faculty Member – faculty appointment letter and 107 Form
  
  *Additional level of signature approval on 107 Form can be added if needed for UCP funds, etc.
  
  - Once the faculty signs their appointment letter, you will receive a notice from Adobe Sign that the packet is complete. Print appointment letter and file in faculty PAF.
  
- **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 31
    - September 7
  
  - Faculty in job code 2358 will receive **FOUR** paychecks. Paychecks will be disbursed on the following dates:
    - June 30
    - July 30
    - August 31
    - September 7
  
  **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.
SUMMER 2021 PROCEDURE

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 23, 2020.
- 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 2021, 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. Special Consultant assignments are paid at a daily pay rate that may or may not equate to the faculty member’s actual pay rate.
- 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 2021 students are limited to working 20 hours per week throughout the entire duration of Summer Term (June 21 – August 27, 2021), 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
SUMMER 2021 PROCEDURE

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 30
  - July 30
  - August 31
  - September 7
- 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 2021 TA work.

Graduate Assistants
- Colleges prepare both the AP101S - TA-GA Summer 2021 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 31
  - 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 2021 Adobe Sign powerform.
- If the work performed is to support a Summer Term 2021 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 2021 course, then the ISA will be paid through college or department funds.

STUDENT REGISTRATION
- April 26 through April 30, 2021, CPREG opens; registration appointment rotations with 16-unit limit
- May 1 through June 18, 2021, 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.

QUESTIONS
<table>
<thead>
<tr>
<th>For pay related questions:</th>
<th>Payroll – Jennifer Hiatt 6-2605</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Term appointment procedures, process and policy:</td>
<td>Academic Personnel - Carol Sammons 6-5228</td>
</tr>
<tr>
<td>Summer Term Special Consultant and ISA questions:</td>
<td>Academic Personnel – Nicole Hadley 6-2841</td>
</tr>
<tr>
<td>Summer Term and Special Session course, enrollment and compensation questions:</td>
<td>Extended Education – Cheri Baumgarten Helen Louie Sumser or <a href="mailto:summer@calpoly.edu">summer@calpoly.edu</a></td>
</tr>
</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 2021
- Summer Term 2021 Ineligibility Lists
- Summer Term 2021 Course Cost Estimator
- Per Unit Rate List provided to the College Dean’s Office