FACULTY SUMMER ASSIGNMENT AND CONTRACTS

2018 Introduction Program
Agenda

- Welcome
- Faculty Summer Assignment Process
  - Data Gathering
  - Planning Tools
  - HR-Faculty Contracts
  - Department Budget Table (DBT) -Funding
  - Payroll
- Closing
Purpose of Training

- Avoid over/underpayments to faculty
- Avoid need for salary cost transfers and retro DBTs
  - Salary incorrectly charged to Project IDs and/or Cost Centers
- Assist in accurate monthly account reconciliations
- HAPPY FACULTY 😊
Objectives

1. Increase accuracy - for amount paid, funding source, and time period
2. Provide useful tools to processing staff that help meet deadlines
3. Minimize changes to contracts after they are created
4. Give a record of “what is expected” for the person who reconciles accounts
Process Overview

Gather data
Check allocation

Finalize contract

Run Payroll

Colleges/Departments And VPAFS

HR

Budget

Payroll

Departments

Create contracts
Initiate DBT

Approve DBT in PS

Reconcile Payroll Exp Report to original data
Timeline

- April 13 – Training provided
- May 11 – SAMS and Contracts due to VPAFS
- May 18 – Faculty Contract Forms due to HR
- June 15 – DBTs due to Budget Office
Data Gathering

- ALL compensated summer activities per individual
  - Teaching
  - Research
  - Committees
  - Supplements

- Dates of service for each activity
- Compensation for each activity
- Funding source(s) for each activity
- Position number
Jay,

I just talked to Dr. Perales and we pay $5000 flat rate for our T/TT faculty in the summer. If she is teaching 1/3 of it, her allocation will be $1666.66 for the summer.

What follow up questions need to be asked?
Dr. Cunningham,

I wanted to take care of appointing you on the project. We have enough funds in the project this year to cover one summer month. Please ask your department to take care of it.

What follow up questions need to be asked?
Who can help

- For teaching
  - Faculty
  - Department Chairs
  - Departmental Admins
  - College Admins

- For grants
  - Principal Investigators
  - Research Service Centers
  - Research Center Staff
Planning Tools – Summer Assignment Master Spreadsheet (SAMS)

The SAMS will include the critical information needed to complete a SharePoint Faculty Contract Form that will be entered into PeopleSoft by HR:

- Position Number “Critical you select a Summer Faculty Position # = Empl Class of FA3”
- 9 Month Compensation Rate
- Contract Begin and End Date “Can be VERY TRICKY to pin down”
- FTE
- Contract Pay/Allocation
- Hours Per Week

Let’s talk about the “Begin and End Dates” of assignments for the summer using an example
Faculty Summer Assignments
Begin and End Dates – Refer to Pink Handout Example

<table>
<thead>
<tr>
<th>Assignments</th>
<th>June 1</th>
<th>June 16</th>
<th>July 1</th>
<th>July 16</th>
<th>August 1</th>
<th>August 16</th>
<th>August 31</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract 2</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Contract 3</td>
<td></td>
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<tr>
<td>Contract 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SAMS

- Next I will walk you through the following examples using the Spreadsheet
  - Faculty Member with a combination of teaching, research and committee assignments (Blue Handout Example)
  - Faculty Member with only research assignments (Yellow Handout Example)
  - Faculty Member with only teaching assignments (Green Handout Example)
SAMS Example
(Refer to the White Handout – Last one in Examples)

Demonstrate the Functionality of the Spreadsheet
  Adding a Block
  Adding a Line
  Deleting a Line

Complete the Example in Class Together
SAMS

When you complete the SAMS please use the following naming format when you route it to the RSC and ultimately to the VPAFS

College of ___XX-XX-XXXX {Date you submitted the final to RSC/VPAFS}

The Task Force will review statistics on number of contracts that needed to be revised, number of funding distributions that needed to be corrected and use this information to evaluate the effectiveness of the SAMS and to evaluate the process overall for adjustments in future summers.
Faculty Overview

- In PeopleSoft, Faculty have a job record and a contract
- Both are required to generate pay
- Information must be correct in order to ensure proper pay
Faculty Overview

- The Job Record contains title, hours, and compensation rate
- The Contract determines the dates of payment
Job Record

- Effective Date: 05/01/2016
- HR Status: Active
- Payroll Status: Active
- Position Number: 10081603
- Position: LECTURER I
- Reg Date: 06/01/2016
- Regulatory Region: USA
- Company: SAN
- Business Unit: UTS02
- Department: BHRO01
- Location: MB
- Establishment: SAN
- Last Start Date: 06/01/2016
- Expected Job End Date: 09/30/2016
- Date Created: 03/11/2016
- Duration: 3 months
### Job Record

#### Compensation Details
- **Emp ID:** 6001161227
- **Effective Date:** 06/01/2016
- **Effective Sequence:** 0
- **HR Status:** Active
- **Payroll Status:** Active
- **Action:** Hire
- **Reason:** Hire

#### Compensation Rate
- **Compensation Rate:** 30,000.00
- **Academic Rate:** 0.00

#### Comparative Information
- **Contract Change Prorate Option**

#### Pay Components

<table>
<thead>
<tr>
<th>Rate Code</th>
<th>Seq</th>
<th>Comp Rate</th>
<th>Currency</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
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<tbody>
<tr>
<td>CNTRCT</td>
<td>0</td>
<td>30,000.00</td>
<td>USD</td>
<td>C</td>
<td></td>
</tr>
</tbody>
</table>

#### Additional Sections
- **Job Data**
- **Employment Data**
- **Earnings Distribution**
- **Benefits Program Participation**
Contract

Contract ID: 000001
Status: Active

Contract Information

*Effective Date: 06/01/2016
Contract Pay Type: Pay Over Contract
*Payment Term: Pay Over Contract
*Monthly Frequency: M Monthly
Calculation Method: Prorate
Pay Period Hours: 
*Daily Hours: 8.00
*Assign Hours To: Not Applicable

*Contract Begin Date: 06/01/2016
Payment Begin Date: 06/01/2016
Actual Start Date: 06/01/2016

*Contract End Date: 06/30/2016
Payment End Date: 06/30/2016
Termination Date: 06/30/2016

Last Payment Date: 
School Schedule: 

Exclude Holiday Schedule
Prorate Hrs in Partial Period
Renew Contract Automatically
## Summer Contract Dates

<table>
<thead>
<tr>
<th>Summer Term 2018</th>
<th>Pay Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>F (First Five-Week Term)</td>
<td>6/1-7/15</td>
</tr>
<tr>
<td>J (First Four-Week Term)</td>
<td>6/1-7/15</td>
</tr>
<tr>
<td>L (Second Four-Week Term)</td>
<td>7/16-8/31</td>
</tr>
<tr>
<td>S (Second Five-Week Term)</td>
<td>7/16-8/31</td>
</tr>
<tr>
<td>8 (Eight-Week Term)</td>
<td>6/1-8/31</td>
</tr>
<tr>
<td>T (Ten-Week Term)</td>
<td>6/1-8/31</td>
</tr>
</tbody>
</table>
Faculty Contract Form (FCF)

- FCFs need to be submitted for ALL summer faculty regardless of tenure status

- All FCFs must be approved by VPAFS prior to submitting to HR.
Faculty Contract Form (FCF)

- Please include actual hours worked on FCF regardless of allocation.

- Administrators (Department Chairs, Deans, etc.) – Although they receive salary as an administrator, we need their Faculty position on the FCF, not their A&P position.
FTE & Allocation

- Remember, the FCF will not calculate allocation based on FTE
- Use calculated FTE on SAMS to determine hours per week on FCF
- Allocation field will be free text
FTE & Allocation Example

<table>
<thead>
<tr>
<th>Contract Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contract Begin Date:</strong></td>
</tr>
<tr>
<td><strong>9 Month Rate:</strong></td>
</tr>
<tr>
<td>(based on 100% time)</td>
</tr>
<tr>
<td><strong>FTE:</strong></td>
</tr>
<tr>
<td><strong>Contract Pay/Allocation:</strong></td>
</tr>
<tr>
<td><strong>Hours Per Week:</strong></td>
</tr>
<tr>
<td><strong>Contract End Date:</strong></td>
</tr>
<tr>
<td><strong>Months Duration:</strong></td>
</tr>
<tr>
<td><strong>Number of Renewals:</strong></td>
</tr>
<tr>
<td><strong>To calculate FTE, divide Hours Per Week by 40. Example: 19 ÷ 40 = .476 FTE</strong></td>
</tr>
</tbody>
</table>

$5,575

$6,000
Faculty are unable to receive more than 1/3 their academic salary during the summer.

Be mindful of tax implications. If their entire summer salary is paid out in less than 3 months, their gross monthly amount will be higher, which will affect the amount of taxes they will pay for that pay period.
Tax Implications- Example

- Professor Xavier’s 9-month salary is $90,000
- During the academic year, Professor Xavier’s gross monthly pay is $10,000 per month
- Professor Xavier can only earn up to $30,000 this summer
- Based on the workload Professor Xavier wants his entire 30,000 paid from June to July
- This will increase his monthly check by $15,000
- His gross monthly earnings have increased and so will the amount of taxes he needs to pay
- Please ensure your faculty are of this prior to agreeing to their FCF
Examples of effort compensated via supplements are noted below.

1. QLP course development
2. Course overloads

Questions pertaining to supplemental pay should be directed to the VPAFS office.

If VPAFS approves supplement, department will submit Supplement Form for processing.

Per Payroll email instructions, DBT will need to be initiated.
Contract Review Report

- Departments will be sent a Contract Audit Report 3 times during the summer.
  - Right before June, July and August payroll confirmation
- Departments must review and inform HR of any discrepancies
The Department Budget Table (DBT) is the distribution table that maintains the funding source(s) for each paid position. It is essential to have each filled position funded accordingly prior to payroll processing in order to avoid retro corrections.

The SAMS will assist greatly with ensuring your DBT data entered is correctly. From this spreadsheet one can gather the following information:

- Position Number
- Contract Effective Date which will match the DBT effective date to be entered
- Combo Codes and the Distribution % to be used
If a Faculty has multiple contracts in the Summer, one can enter in all DBT’s required with the various effective dates in order to set the DBT up accordingly in advance.
### Department Budget Table (DBT)

#### Department Budget Table Changes

**Instructions**

Complete the DBT Details tab and return to the Workflow Details tab. Click Save and then Submit when all changes have been made.

**Set ID**: UTSA1  
**Trans ID**: 000046291  
**Position Nbr**: 10006033  
**Dept ID**: AEN004  
**Position Incumbent**: PROFESSOR  
**Dept**: COE MECHANICAL ENGINEERING

#### Current Earnings Funding

<table>
<thead>
<tr>
<th>Year</th>
<th>Effective Dt</th>
<th>Earn Cd</th>
<th>Seq</th>
<th>Combo Code</th>
<th>Distrb %</th>
<th>% Effort</th>
<th>Limit Amt</th>
<th>Funding End Dt</th>
<th>Redirect Acct</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>09/01/2015</td>
<td>1</td>
<td>100135958</td>
<td>100.000</td>
<td>12/31/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</table>

#### Proposed Earnings Funding

**Effective Dt**: 06/01/2016

<table>
<thead>
<tr>
<th>Earn Cd</th>
<th>Seq</th>
<th>Fund Type</th>
<th>Combo Code</th>
<th>Distrb %</th>
<th>% Effort</th>
<th>Limit Amt</th>
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<tbody>
<tr>
<td>Grant</td>
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<td>100157665</td>
<td>10.000</td>
<td>07/31/2016</td>
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<tr>
<td>Grant</td>
<td>1</td>
<td>100158045</td>
<td>50.000</td>
<td>08/31/2016</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grant</td>
<td>1</td>
<td>100158218</td>
<td>40.000</td>
<td>08/31/2016</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Department Budget Table (DBT)

## Department Budget Table Changes

**Instructions**

Complete the DBT Details tab and return to the Workflow Details tab. Click Save and then Submit when all changes have been made.

- **Set ID:** UTSA1
- **Trans ID:** 000042922
- **Position Nbr:** 1006033
- **Position Name:** PROFESSOR
- **Dept ID:** AEN004
  - **Department:** COE MECHANICAL ENGINEERING

### Current Earnings Funding

<table>
<thead>
<tr>
<th>Year</th>
<th>Effective Dt</th>
<th>Earn Cd</th>
<th>Seq</th>
<th>Combo Code</th>
<th>Distrb %</th>
<th>% Effort</th>
<th>Limit Amt</th>
<th>Funding End Dt</th>
<th>Redirect Acct</th>
</tr>
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<tbody>
<tr>
<td>2016</td>
<td>09/01/2015</td>
<td>1</td>
<td>100135558</td>
<td>100000</td>
<td>100.000</td>
<td></td>
<td></td>
<td>12/31/2015</td>
<td></td>
</tr>
</tbody>
</table>

### Proposed Earnings Funding

- **Effective Dt:** 07/16/2016

- **Fiscal Year:** 2016

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**UTSA**, The University of Texas at San Antonio™
Once DBT’s for summer faculty have been submitted and approved the following query will allow you to validate that these positions are funded correctly.

- Navigation: Main Menu > HCM Reporting Tools > Query > Query Viewer
  - UTS_CA_SUMMER_FACULTY_FUNDING
Payroll

- **Final Stage** in the Contract Pay Module
- Faculty employee in order to be paid for the Summer will need the following:
  - Job Data (Workforce Administration)
  - (Contract) Compensation Frequency on the Job Data Compensation page
  - Defined contract pay settings on the Contract Pay page (Update Contract Pay NA)
Payroll

Payroll Processes used to Process Contract Pay

1. Create Contract Projected Pay
   ○ Process which generates contract pay data that can be loaded unto pay sheets
   ○ This process will calculate contract earnings for all pay periods in the payment term defined in the contract. The calculated values are considered projections until they are paid.
Payroll

2. **Contract Payment Details**
   - Process that is created after “Create Projected Contract Pay” is ran to review projected and actual earnings over the entire payment term of a contract.
   - Summary page which defines the contract begin/end dates, contract worth (amount to be paid), payment summary, projected earnings within the Summer contractual period (June – August)
Payroll

- Contract for Summer I
- Contract Begin date of 6/1/2016 with a Contract end date of 07/15/2016.
Payroll

- Contract for Summer II
- Contract Begin date of 7/16/2016 with a Contract end date of 08/31/2016.
Payroll

- Contract for Summer 8 Week
- Contract Begin date of 6/1/2016 with a Contract end date of 08/31/2016.
Payroll

Faculty Employee Paycheck View (July Paycheck)

University of Texas, San Antonio
1 UTSA Cir
San Antonio, TX 78249

Pay Group: F9M-UTSA Faculty 9 Month
Pay Begin Date: 06/01/2015
Pay End Date: 06/30/2015

Business Unit: UT002
Advice #: 07/01/2015

San Antonio, TX 78250-3440

TAX DATA:
Federal: 0.00
State: 6,751.43

Marital Status: Single
Allowances: 1
Addl. Percent: 0
Addl. Amount: 0

Employee ID:
Department: ARC002.DEPT OF ARCHITECTURE
Location: MONTEREY BUILDING
Job Title: ASSISTANT PROFESSOR
Pay Rate:

<table>
<thead>
<tr>
<th>Description</th>
<th>Rate</th>
<th>Current Hours</th>
<th>Earnings</th>
<th>YTD Hours</th>
<th>Earnings</th>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Earnings - (18)</td>
<td>0.00</td>
<td>36.80</td>
<td>0.00</td>
<td>96.80</td>
<td>0.00</td>
<td>Fed Withholding</td>
<td>0.00</td>
<td>6,751.43</td>
</tr>
<tr>
<td>Contract Earnings - (18)</td>
<td>0.00</td>
<td>36.80</td>
<td>0.00</td>
<td>96.80</td>
<td>0.00</td>
<td>Fed MED/EE</td>
<td>4.37</td>
<td>451.33</td>
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<tr>
<td>Contract Earnings - (18)</td>
<td>0.00</td>
<td>36.80</td>
<td>0.00</td>
<td>96.80</td>
<td>0.00</td>
<td>Fed OAS/D/E</td>
<td>18.65</td>
<td>2,571.10</td>
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<tr>
<td>Contract Earnings - (18)</td>
<td>0.00</td>
<td>36.80</td>
<td>0.00</td>
<td>96.80</td>
<td>0.00</td>
<td>Total</td>
<td>23.03</td>
<td>9,885.81</td>
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</table>

HOURS AND EARNINGS

TAXES

BENEFITS

<table>
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<tr>
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<th>Description</th>
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<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional Retirement Plan</td>
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<td>2,802.31</td>
<td>Group Life Insurance</td>
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<td>113.40</td>
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<tr>
<td>Parking: Pre-Tax</td>
<td>15.00</td>
<td>155.00</td>
<td>Short Term Disability</td>
<td>0.00</td>
<td>113.90</td>
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<tr>
<td>Dental</td>
<td>0.00</td>
<td>502.65</td>
<td>Vision</td>
<td>0.00</td>
<td>43.60</td>
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</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional Retirement Plan</td>
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<td>3,581.92</td>
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<td></td>
<td>Medical</td>
<td>0.60</td>
<td>4,746.60</td>
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</table>

TOTAL: 23.03 | 9,885.81

* TAXABLE

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Total GROSS</td>
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<tr>
<td>TOTAL TAXES</td>
<td>23.93</td>
<td>283.94</td>
</tr>
<tr>
<td>TOTAL DEDUCTION</td>
<td>36.04</td>
<td>256.94</td>
</tr>
<tr>
<td>NET PAY</td>
<td>283.94</td>
<td>256.94</td>
</tr>
</tbody>
</table>
Reconciliation

- SAMS
- Payroll Distribution Report
- MFR
Next Steps

- If you have questions, please email VPAFS@utsa.edu
  - All answers will be distributed back to participants
Thank you

- For all you continue to do
- For the attention you pay to detail
- For making a difference

We count on you!
New Tenure/Tenure-Track Faculty

- New to UTSA – will start teaching in Fall 18, but will begin working in August.

- VPAFS will provide HR with a complete list of all new faculty.
  - DO NOT put on SAMS
  - Departments will have to provide VPAFS with employee specific information (SSN, DOB, etc.)

- HR will invite faculty to Day O.N.E.