Date: May 19, 2014

To: Human Resources Officers
Payroll Managers

From: Evelyn Nazario
Associate Vice Chancellor
Human Resources Management & CO HR Services

Subject: FY 2013/14 Bonus Program for Academic Support (Unit 4) Employees

Overview

Audience: Human Resources Officers, Payroll Managers and/or campus designees responsible for implementing employee bonuses

Action Item: Process payments for Long-Term Service Bonus; solicit eligibility and process payments for Educational Achievement Stipend; and information only on Merit Bonus

Affected Employee Group(s)/Unit(s): Eligible APC (Unit 4) Employees

Summary

This technical letter provides information for the FY 2013/14 Long-Term Service (LTS) Bonus, Educational Achievement Stipend (EAS), and Merit Bonus for all eligible Academic Support (Unit 4) employees. The LTS Bonus is a 5.0% one-time lump sum bonus. The EAS varies by the level of degree earned. The LTS and EAS payments must be issued no later than September 1, 2014.

The parties agree that for FY 2013/14, the Merit Bonus pool created in FY 2005/06 and FY 2006/07 ($762,300) will be added to the monies available for the Budget Shortfall Mitigation (BSM) Bonus. The BSM Bonus must be issued by November 1, 2014. Human Resources Officers, Payroll Managers, and designee(s) responsible for processing Unit 4 employee stipends and bonus programs should review this technical letter in its entirety.

Detailed Program Information for Bonus Provision

- **Long-Term Service Bonus (LTS):**
  The LTS Bonus continues to be available to employees who meet established service criteria. LTS Bonus amounts are based upon 2013 calendar year earnings.

For additional program information and processing instructions, go to the Human Resources CSYou Web site at: [https://csyou.calstate.edu/Tools/HR/SalaryProgram/apc/long-term-satisfactory-service-bonus/Pages/default.aspx](https://csyou.calstate.edu/Tools/HR/SalaryProgram/apc/long-term-satisfactory-service-bonus/Pages/default.aspx).
Note: The performance criteria for the LTS Bonus Program has been removed. Refer to Article 23.4 B of the collective bargaining agreement effective November 13, 2012 through June 30, 2015, or contact your labor & employee relations manager for more information.

- **Educational Achievement Stipend (EAS):**  
  Unit 4 employees who receive a master’s or doctoral degree from an accredited institution between July 1, 2013 and June 30, 2014, and are employed at the CSU in a Unit 4 classification when they receive the degree, are eligible for the EAS if they are on payroll in a Unit 4 classification on August 1, 2014. Campuses are responsible for processing payments.

  Employees with doctoral degrees receive a stipend 25% above the amount paid to employees who hold a master’s degree. Employees who received more than one degree are to receive a stipend for each degree received in accordance with the eligibility requirements.

  Stipend amounts are as follows:
  - Master's Bonus Amount: $2,272.37
  - Doctoral Bonus Amount: $2,840.46

  The following processing instructions are provided in Attachment A:
  - STIPEND PROGRAMS – Educational Achievement Stipend

As a reminder, the funding for these bonus programs was established from monies set aside in the FY 2000/01 compensation pool.

- **Merit Bonus:**  
  As a result of the temporary change in the allocation of the Merit Bonus pool for FY 2013/14, no action is required by the campuses to distribute Merit Bonuses to Unit 4 employees for this fiscal period.

The EAS and LTS Bonus payments must be issued to eligible employees by September 1, 2014. The Chancellor’s Office will run reports to calculate the BSM Bonus after the EAS and LTS Bonus have been paid out. Once calculated, the BSM Bonus will be addressed in a technical letter.

Please direct questions regarding this technical letter as follows:

- PIMS processing instructions  
  CSU Audits representative at the SCO
- CMS Baseline processing instructions  
  CMS liaison for Systemwide HR at (562) 951-4418
- Collective bargaining aspects  
  Labor Relations at (562) 951-4400
- All other questions  
  Human Resources Management at (562) 951-4411

This document is available on the Human Resources Management Web site at:  
### PROCESSING INSTRUCTIONS

#### I. STIPEND PROGRAMS – EDUCATIONAL ACHIEVEMENT STIPEND

<table>
<thead>
<tr>
<th>PIP PROCESSING INFORMATION:</th>
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<tbody>
<tr>
<td>Processing Responsibility:</td>
<td>Campus</td>
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</tbody>
</table>
| Processing Date(s): | - No later than 08/27/14 (last payroll cycle)  
- Pay Period: August 2014 |
| Earnings ID: | G5 |
| Amount: | - Master’s Bonus Amount: $2,272.37  
- Doctoral Bonus Amount: $2,840.46 |
| Subject to Retirement Withholdings: | No |
| Taxable/Reportable: | Yes |
| Subject to Medicare/Social Security: | Yes |
| Included in Calculation for Overtime: | No |
| Included in Calculation for NDI/DL Payments: | No |
| Additional Information: | N/A |

<table>
<thead>
<tr>
<th>CMS PROCESSING INFORMATION:</th>
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<tbody>
<tr>
<td>Workforce Administration:</td>
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<tr>
<td>Temporary Faculty:</td>
<td>N/A</td>
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<tr>
<td>Benefits:</td>
<td>N/A</td>
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</tbody>
</table>
| Time and Labor: | - Earnings ID:  
  - G5 – Process via Additional Pay  
  - Use processing amounts/dates referenced above |
| Leave Accounting: | N/A |
| Absence Management: | N/A |
| Labor Cost Distribution: | N/A |
| Additional Instructions: | Processing Responsibility: Campus |