The California State University
SYSTEMWIDE HUMAN RESOURCES

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Date: June 3, 2010

Code: TECHNICAL LETTER
HR/Salary 2010-13

To: Associate Vice Presidents/Deans of Faculty
Human Resources Directors
Payroll Managers

From: Evelyn Nazario
Assistant Vice Chancellor
Human Resources Management

Margaret Merryfield
Senior Director
Academic Human Resources

Subject: Faculty (Unit 3) Salary Administration For Summer Term Employment

Overview

Audience: Associate Vice Presidents/Deans of Faculty, Academic Personnel Managers, Campus Payroll Managers and/or campus designees responsible for faculty payroll processing

Action Item: Process summer term 2010 employment payments

Affected Employee Group(s)/Unit(s): Faculty employees (Unit 3)

Summary

This letter provides instructions for faculty (Unit 3) salary administration for summer 2010. It addresses summer programs at both quarter and semester campuses offered through state support as well as through self-support. It also provides instructions for processing indirect instructional payments and summer health benefit stipends for affected faculty members and describes policies regarding lecturer entitlements and SSI eligibility for part-time lecturers. Campus designees with responsibility in these areas should review the remainder of this letter for detailed information.

The procedures described here are pursuant to Article 21 of the Collective Bargaining Agreement between the California State University and the California Faculty Association ratified by the CSU Board of Trustees May 15, 2007 and effective through June 30, 2010. This letter will address four areas related to summer term employment:

- Appointments and Salary
- Payments for Indirect Instruction
- Service Salary Increases and Entitlement Issues for Lecturers
- Summer Health Benefit Stipends

Appointments and Salary

- General Provisions of Appointment to Summer Term for Extra Pay
  Salary rates. Summer salary rates for faculty members who were employed in a state-supported Unit 3 appointment in academic year 2009/2010 shall be based on the spring 2010 salary rate, or on the salary rate for the most recent academic term worked in 2009/2010.
  Faculty Who Teach Only in the Summer Term. Faculty who were not employed in a Unit 3 appointment in any of the terms in the academic year immediately preceding summer term do not have an academic year

Distribution:
CSU Presidents
Executive Vice Chancellor & CAO
Vice Chancellor, Human Resources
Vice Presidents, Academic Affairs
Deans of Extended Education
Vice Presidents, Administration
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State Controller's Office/PPSD

salary upon which to base their summer salary. Therefore, these faculty members may be appointed at any salary level within classification code 2457 for state-supported summer term employment or 2357 for self-supported summer term employment.

See Article 21.1 for a list of the provisions in the Collective Bargaining Agreement that apply to individuals who become faculty unit employees *solely* by appointment to summer term employment.

Class cancellation. If a class is cancelled due to low enrollment or for budgetary reasons, the faculty member shall be paid on a pro-rata basis for each class taught prior to cancellation.

Enrollment-based compensation. If a course has an enrollment of less than 15 students, the faculty member's salary shall be reduced by 5% for each student below 15. Salary shall be reduced to no lower than 85% of full salary. This applies to both state-support and self-support courses, with appointments in classification codes 2357 or 2457. The reduced salary rates are as follows: 95% for 14 students, 90% for 13 students, and 85% for 12 or fewer students. The President may offer rates higher than the reduced compensation rates for low enrollment.

❖ Salary during State-Supported Summer Session at all Semester Campuses, including Stanislaus

Faculty members who teach for extra pay during a state-supported summer term in addition to their regular academic year position are to be appointed into the following classification code:

- 2457 Instructional Faculty, Summer Session – State Support

Faculty members in this classification are paid on a per unit basis. The rate per unit is calculated by dividing the faculty member's academic year full-time annual salary by 30:

- Summer Salary Rate Per Unit = (AY Full-time Salary)/(30)

Pursuant to provision 21.5, the MOU regarding "12 Month Department Chair Employment in Summer 2006 – Semester Campuses" shall remain in effect.

Processing instructions are provided in Attachment A, Summer Term Employment: I –Coding Instructions for Class Code: 2357/2457.

❖ Salary during State-Supported Summer Session at Quarter System Year-Round Operation (QSYRO) Campuses

Faculty members who work during the summer term at a QSYRO campus as an additional quarter beyond their *regular academic year assignment* shall be appointed in the following classification*:*

- 2368 Instructional Faculty – Extra Quarter Assignment

Pursuant to provision 21.5, the campus summer agreement that governs terms and conditions at Cal Poly SLO remains in effect.

❖ Salary during State-Supported Summer Session at CSU Bakersfield and at CSU San Bernardino

Faculty members who teach for extra pay during a state-supported summer term in addition to their regular academic year position are to be appointed into the following classification code:

- 2457 Instructional Faculty, Summer Session – State Support

Faculty members in this classification are paid on a per unit basis. The rate per unit is calculated by dividing the faculty member's academic year full-time annual salary by 45:

- Summer Salary Rate Per Unit = (AY Full-time Salary)/(45).

Processing instructions are provided in Attachment A, Summer Term Employment: I –Coding Instructions for Class Code: 2357/2457.

❖ State-supported Summer Term as Part of Academic Year at Semester Campuses

In order for a campus to appoint a faculty member to teach in the summer as part of the regular academic year assignment, either

(1) The campus must have an agreement negotiated at the statewide level between the CSU and the CFA that allows faculty to spread the academic year workload over the academic year plus the summer (currently allowed only at Humboldt State University, CSU Sacramento, and San Jose State University) OR

(2) The campus must submit an academic calendar that includes a summer term that meets the CSU definitions to be equivalent to a regular semester. No semester campuses have such an approved calendar for summer 2010.

Faculty members who teach in the summer as part of the regular academic year appointment do not receive extra salary for the summer appointment and do not accrue additional benefits.

❖ Salary during Self-Supported Summer Session at all Campuses

Faculty members at all campuses who teach during summer sessions in self-support for-credit programs offered through Extended Education are to be appointed into the classification code listed below.

- 2357 Instructional Faculty, Summer Session – Extension

Faculty members in this classification are paid on a per unit basis. At *semester* campuses, the rate per unit is calculated by dividing the faculty member's academic year full-time annual salary by 30 (30 units represents full-time for one academic year at a semester campus):

- Summer Salary Rate Per Unit = (AY Full-time Salary)/(30).

At *quarter* campuses, the rate per unit is calculated by dividing the faculty member's academic year full-time annual salary by 45 (45 units represents full-time for one academic year at a quarter campus):

- Summer Salary Rate Per Unit = (AY Full-time Salary)/(45).

Processing instructions are provided in Attachment A, Summer Term Employment: I –Coding Instructions for Class Code: 2357/2457

Payments for Indirect Instruction

❖ Tenured and Probationary Faculty Members at All Campuses

All tenured and probationary faculty members employed in state-funded summer sessions who do not receive a specific, compensated indirect instructional assignment in the summer term shall receive an indirect instructional payment in the amount of $150 per each WTU of direct instructional work assigned for the summer term. Payment will be made as a one-time lump sum payment, paid at the end of the employee's summer assignment or at the end of the summer term, as appropriate.

Tenured and probationary faculty members who do receive a specific, compensated indirect instructional assignment in the summer term shall not receive the $150 per WTU payment.

❖ Lecturers at All Campuses

At all campuses, lecturers who receive and complete a specific indirect instructional assignment in the summer term shall be compensated for that assignment. Lecturers who do not receive a specific, compensated indirect instructional assignment in the summer term shall not receive any compensation for indirect instructional work.

Processing instructions for lump-sum payments for indirect instructional work are provided in Attachment A: Summer Term Employment: II – Indirect Instructional Payment.

Service Salary Increases (SSIs) and Entitlement Issues for Lecturers

- Lecturer SSIs
  Pursuant to provision 21.23(c), WTUs taught by lecturers in state-supported summer terms count towards units required for SSI eligibility pursuant to provision 12.10.
- Lecturer Entitlements
  In some cases, state-supported summer term employment is included for purposes of determination of the timebase entitlement for a "similar assignment" as defined in provision 12.3, as well as fulfillment of qualifications for one-year and three-year contracts as described in provisions 12.3 and 12.12. Employment must have been in the same department at the same campus. Refer to Appendix F of the Collective Bargaining Agreement for additional information.

Summer Health Benefits Stipend

If a lecturer employed in a state-supported summer term meets the following criteria, he/she will be eligible for a summer health benefits stipend.

- The lecturer was employed in the immediately preceding spring term and enrolled in CalPERS health benefits; and
- The lecturer was appointed and worked at least six (6) WTUs over the entire summer term; and
- The lecturer was ineligible for CalPERS health benefits during any of the July, August, or September pay periods;

A lecturer meeting all three criteria is eligible to receive a stipend of $400 per month for those pay periods (July, August, and/or September) during which he/she was ineligible for CalPERS health benefits. Stipends are *not* paid to any employee during pay periods in which the employee is eligible for CalPERS health benefits. These provisions apply at all campuses.

Processing instructions are provided in Attachment A, Summer Term Employment: III – Summer Health Benefits Stipend.

Faculty Benefits During State-Supported Summer Session at Semester Campuses

Technical letter HR/Benefits 2006-08 (http://www.calstate.edu/HRAdm/pdf2006/TL-BEN2006-08.pdf) addresses sick leave accrual and usage and eligibility for disability programs for faculty members during state-supported summer sessions at semester campuses. These provisions remain in effect.

The following processing instructions are provided in Attachment A:

I. Coding Instructions for Class Code: 2357/2457
II. Indirect Instructional Payment
III. Summer Health Benefits Stipend

Please direct questions regarding this technical letter as follows:

PIMS processing instruction	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	Academic Human Resources at (562) 951-4503

This document is available on Human Resources Managment's Web site at:
http://www.calstate.edu/HRAdm/memos.shtml.

EN/MM

Attachment

PROCESSING INSTRUCTIONS
Summer Term Employment

I - Coding Instructions For Class Code 2357/2457

PIMS EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:	
Processing Responsibility:	Campus
Processing Date(s):	N/A
Effective Date:	Summer term
PIMS Transaction:	A54
Detailed Transaction Code (Item 719):	N/A
EH Remarks (Item 215):	N/A
Pay Amount:	Varies by employee
Pay Form:	Units
Lump Sum Earnings ID:	N/A
Employees on Leave: Temporary Appointees:	N/A
Additional Information:	• Item 310, Salary Per = U • Item 335, Range: 1 – Semester campus, 2 – Quarter campus • Item 365, Base = Unit between 0.1 - 15 • Item 365, Rate = Between the minimum and maximum rate for the range • Item 365, Total Amount= Base * Rate • Item 405, Time Base = IND • Item 505, Retirement = Refer to PIMS Manual
SCO Personnel Letter:	N/A

CMS PROCESSING INFORMATION:	
Workforce Administration:	• Action Reason(s): o DTA/PAY o HIR/APT o HIR/CON o HIR/PRI o REH/REH ▪ Effective Date: Campus determined ▪ Job Code(s): 2357/2457 ▪ Job Comp Frequency (Item 310) ▪ Grade (Item 335) ▪ Expected End Date: Campus determined ▪ Pay End Date: Campus determined ▪ Comp Rate x Unit = Session Rate (Item 365) ▪ Empl Type: H (Hourly); Empl Class: Immediate Pay; FTE: Ind (Item 405) ▪ Retirement Code: Refer to PIMS (Item 505)
Temporary Faculty:	Same as above
Benefits:	N/A
Time and Labor:	N/A
Leave Accounting:	N/A
Absence Management:	N/A
Labor Cost Distribution:	N/A
Additional Instructions:	N/A

II – Indirect Instructional Payment

PIP PROCESSING INFORMATION:	
Processing Responsibility:	• The campuses are responsible for keying lump sum payments.
Processing Date(s):	• Upon completion of the employee's assignment OR at the end of the summer term, as appropriate.
Earnings ID:	GW
Amount:	Varies by employee ($150.00 per WTU of direct instruction)
Subject to Retirement Withholdings:	No
Taxable/Reportable:	Yes
Subject to Medicare/Social Security:	Yes
Included in Calculation for Overtime:	N/A
Included in the Calculation for NDI/IDL Payments:	No
Earnings Statement Description:	INDIRCT INS
Additional Information:	• Only one payment can be processed for the summer term reflecting the total amount due, at the end of the assignment or summer term as appropriate. • GW must be keyed using the employee's regular faculty position in a month that regular pay is issued (e.g., June, July and August for probationary and tenured faculty). If the summer session ends in July, the campus can key the payment effective July pay period using the employee's regular faculty position if regular pay is being issued in July.

CMS PROCESSING INFORMATION:	
Workforce Administration:	N/A
Temporary Faculty:	N/A
Benefits:	N/A
Time and Labor:	• Earnings ID: GW o Process via Additional Pay o Amount varies as indicated above
Leave Accounting:	N/A
Absence Management:	N/A
Labor Cost Distribution:	N/A
Additional Instructions:	N/A

III – Summer Health Benefits Stipend

PIP PROCESSING INFORMATION:	
Processing Responsibility:	• The campuses are responsible for keying lump sum payments.
Processing Date(s):	• Upon completion of session/assignment or at the end of the summer term. See additional information below.
Earnings ID:	GZ
Amount:	Varies by employee ($400.00, $800.00 or $1200.00 only)
Subject to Retirement Withholdings:	No
Taxable/Reportable:	Yes
Subject to Medicare/Social Security	Yes
Included in Calculation for Overtime:	N/A
Included in the Calculation for NDI/IDL Payments:	No
Earnings Statement Description:	Health Stip
Additional Information:	• Only one payment can be processed for the summer term to coincide with the number of pay periods that the employee was not eligible for health benefits. Payment amount is $400, $800 or $1200 as appropriate. • Payments must be keyed using the employee's regular faculty position in a pay period immediately preceding the summer session assignment (e.g., May or June)

CMS PROCESSING INFORMATION:	
Workforce Administration:	N/A
Temporary Faculty:	N/A
Benefits:	N/A
Time and Labor:	• Earnings ID: GZ o Process via Additional Pay o Amount varies as indicated above
Leave Accounting:	N/A
Absence Management:	N/A
Labor Cost Distribution:	N/A
Additional Instructions:	N/A