College of Education
Faculty Summer Appointments – 2024

In this presentation

Overview

- Salary for 9-month faculty is based on fall and spring semester dates
- Work performed during summer dates = additional compensation
- In Workday, process as Additional Job(s)

--- 12-month academic year ---

9-month faculty *+ summer add job(s)*
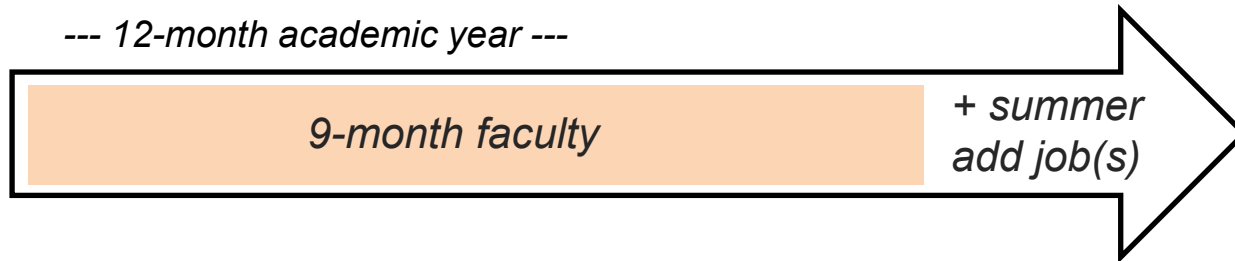
See more at Workday: Faculty Summer Jobs Process Overview

Changes to 9-month academic employment dates

? through 2022-23

9/1   **9-month faculty**   5/31   *+ summer add job(s)*   8/31

You are here
2023-24

9/1   9-month faculty   5/31   + summer add job(s)   **8/15**

Beginning fall 2024

8/16   9-month faculty   5/15   + summer add job(s)   8/15

Faculty & Academic Graduate Student Employees Summer 2024 Appointment Guidance

Teaching

(Organized courses)

Non-teaching

-Research
-Administrative

Summer appointment

Max FTE = 100%
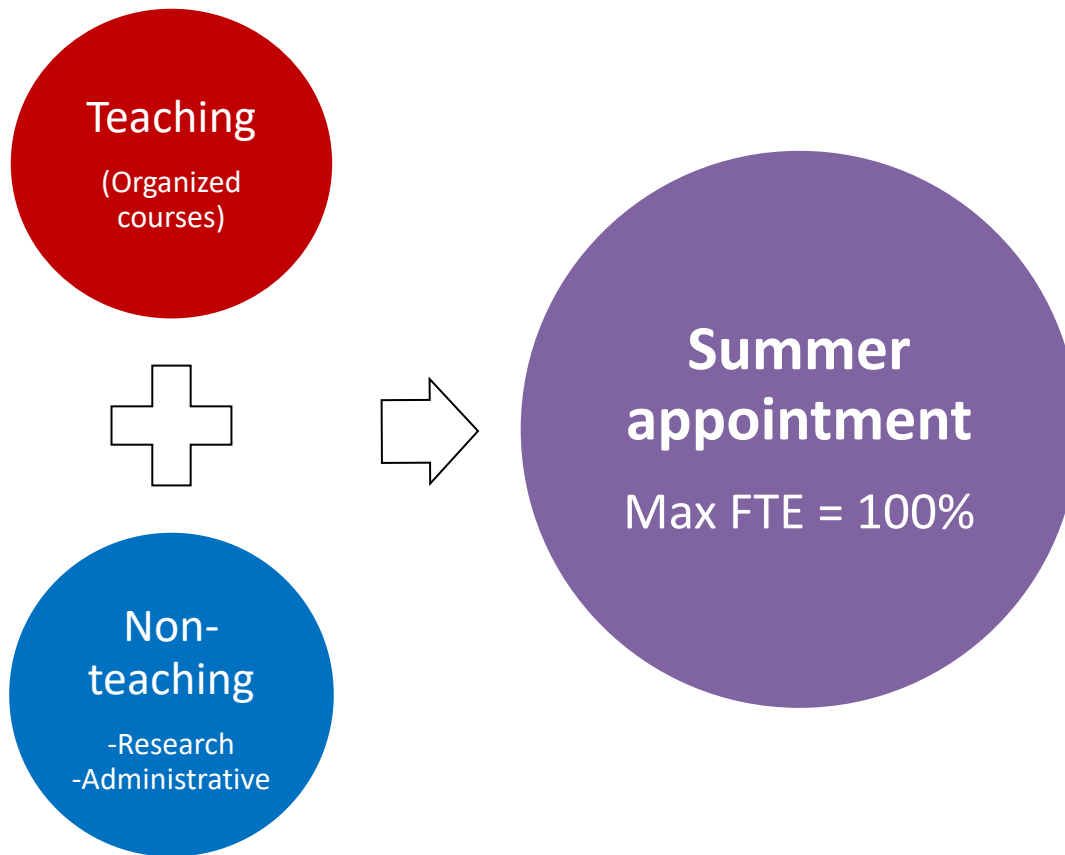
Teaching

Organized course dates – summer 2024:

- First term: June 1-July 15
- Second term: July 16-August 15
- 9-week term: June 1-July 31
- 12-week (whole) term: June 1-August 15

Fall semester starts August 16, 2024

See [COE: 2024 Summer Faculty Employment Guidance](#)

COE salary cap policy

- No more than $9,000 per course

- Co-taught courses: Salary cap applies *per course*
  - Compensation *total* for all instructors cannot exceed $9k
  - Example: Two instructors co-teach 50/50 – each instructor receives $4,500

- In BP comments, describe split (e.g. 50/50) and who is teaching the other portion

COE Faculty Summer Assignments Policy 2024.pdf

Summer teaching load

Summer teaching load is 0 or 1 courses per summer
- One organized course per summer: no pre-approval needed
- Two or more organized courses = Instructional Overload

Instructional overload process: Summer process ≠ fall/spring process

Approvals
IO form not required, but Chair and/or Dean approval is:
- Two in *different* sessions: Chair approval
- Two in *same* session: Chair *and* Dean-delegate approval
  - Email request to Beth Maloch and cc COE-FacultyAffairs@austin.utexas.edu

See COE: Additional Employment and Allowances > IO > summer process

Teaching: Required approvals and BP comments

1) Unique course ID required – add to a) spreadsheet <u>and</u> b) BP comments

2) For any co-taught courses, name other instructor and describe split (e.g. 50/50)

3) If relevant, note Instructional Overload approvals:

- Teaching 2 courses during **different** sessions requires *Chair* approval
    - *BP comments: "Teaching two courses in the summer approved by [Chair Name] on MM/DD/YYYY"*

- Teaching 2 courses during **same** session requires *Chair and Dean-Designate* approval
    - *BP comments: "Teaching two classes in [first/second] summer session approved by [Chair Name] on MM/DD/YYYY and Sr. Associate Dean Beth Maloch on MM/DD/YYYY"*

COE Faculty Summer Assignments Policy 2024.pdf

Non-teaching summer activities

Activity types:
- Offer/retention letter summer salary
- Summer Research Award
- Faculty Development Award
- Other administrative
- Sponsored projects

Administrative

Research

Processing:
- Process as individual Add Jobs with appropriate FTE
- Give each a unique job title on spreadsheet and in Workday
  - *Example: Graduate Advisor 6/1-6/30; NIH 7/1-7/15*
- Briefly describe reason for pay/work to be performed in BP comments
- Chair approval of the additional work is required
- Upload documentation: offer letter, award letter, etc.

Administrative jobs in Workday

- Briefly explain in BP comments what the faculty member will be doing, purpose of position, description of activities. **<u>Why are we paying them?</u>**

- Give a descriptive, unique Job Title on spreadsheet and Workday BP.
  - Strongly recommended: include dates. Example: *Co-chair 7/1-31*

- Job must end by August 15

- Coordinate timing/FTE with other summer jobs (administrative is usually the most flexible of summer jobs)

- Indicate Chair approval ("Approved by [Chair Name] on MM/DD/YYYY")

- Upload to BP any needed forms (Additional Job, etc.) or relevant documentation that provides further clarification, chain of request and approval, etc.

Offer/Counteroffer/Retention Letter Summer Salary

- Upload copy of signed letter to BP

- Add comments to BP. *Example: Summer salary included in offer letter.*

- Check Summer Salary section on T/TT Faculty Employment Lifecycle List

  - <u>Important</u>: Report discrepancies to COE-FacultyAffairs

- Academic HR Exec will record summer salary used on T/TT Faculty Employment Lifecycle List during review process:

Summer Salary - Offer Letter at Hire	
Name Summer Salary	Total mos. summer salary
Venkman, Peter	4
Summer salary distribution	Month 1
Use within first 3 years	July 2022
Month 2	Month 3
August 2022	**Available**
Month 4	Month 5
Available	n/a

IMPORTANT note on offer/retention letter summer salary:

Each department's summer folder on Box includes a subfolder, "*Offer and retention summer salary.*"

In that folder is an Excel spreadsheet, "*Summer 2024 – Faculty summer pay – new hire and retention.xlsx*"

Faculty owed offer/counteroffer/retention letter summer salary are listed by department. (Corresponding letters are also in the folder.)

Rows highlighted in <mark>yellow</mark> have summer salary that **MUST** be used **THIS SUMMER**.

Discuss timing with your faculty

New Faculty Starting in Fall 2024

- No need to create summer Add Job in Workday for August 2024 pay
- August 1-15 salary for new T/TT faculty already recorded in PAR, will push to Workday

```
Action: ___           Funding Commitments                  Section: 02 of 08
-------------------------------------------------------------------------
Name: FACULTY, NEW                             Unit: 1040 CURRICULUM & INSTR

       Amount   Account      Type of Cost         Source Rcr  Applies   Approved
>       5,966   1926XX0309   OE OTHER EMPLOYMENT   Dean    N   08 01 24  02 27 24
```

Summer Research Award (SRA)

- One month's summer salary for awardees
- Options *with conditions per award letter*:
    a) One month at 100%: *No concurrent teaching/administrative* OR
    b) Two months at 50%: *50% of effort must be devoted to proposed research; other 50% may include teaching/administrative*

Process:
- Add Job with appropriate FTE
- Upload signed SRA Acceptance Form (on Box) to BP
- Add appropriate comments to BP
- Funding: 19-2665-8725

See [COE: Summer Research Award (SRA)](#)

Faculty Development Award (FDA)

- Professional-track faculty only
- Award of up to $10,000 can be used for summer salary and operational funds
- Faculty member submits budget with nomination

Process:
- Add Job with appropriate FTE
- Upload signed FDA Acceptance Form (on Box) to BP
- Add appropriate comments to BP
- Cost Center will be shared with department

See COE: Faculty Development Award (FDA)

Managing multiple summer jobs in Workday

Managing multiple jobs

Requirements:

- Maximum FTE = 100% (40 SWH). This **cannot** be exceeded.

- Every Additional Job must answer all of the following:
  - Activity? *Teaching, administrative, research*
  - Service dates? *Example: 6/1-7/15*
  - FTE/SWH? *Example: 80%/32 SWH*
  - Allocation? *Example: $9,000*

Strategies:

- Moveable vs. immoveable objects
- Solving for "X"

Moveable vs. immoveable objects

Depending on the activity (teaching or administrative), dates or FTE/SWH may be flexible (moveable objects) **if**:

    a) A specific allocation is required, BUT
    b) Concurrent summer commitments limit FTE/SWH available

In other activities, there is limited or *no* flexibility (immoveable objects).

Sponsored project-funded commitments (research) are typically *not* flexible.

Moveable vs. immoveable objects

Activity	Service dates moveable?	FTE/SWH moveable?
Teaching	**No**	Yes *(Calculated from salary cap)*
Administrative	Yes	Yes
Research	**No***	**No***

Important:

- Summer pay must be processed as Additional Job with FTE whenever possible
- Instructional Overload (IO; for teaching) or One-Time Payment (OTP; for administrative) can be used to pay compensation owed above FTE, but only **if**
  - a) FTE for service period is already at 100% FTE/40 SWH, <u>and</u>
  - b) b) it is not possible to adjust service dates
- Research **CANNOT** pay via OTP. Must be FTE as described by the sponsor/grant.
- *Contact COERA/your research support unit staff to see whether research can be adjusted **<u>if necessary</u>**. This should be only be considered if there are no other reasonable options.

Solving for X

What's the "X"?
- If *known value is the allocation* (payment amount), **X is SWH**
- If *known value is SWH*, **X is the Allocation**

Examples:

1) Faculty member's academic rate at 100% FTE is below the College salary cap maximum.
   - ➢ X is Allocation

2) Faculty member is to be paid $3,000 for administrative work.
   - ➢ X is Scheduled Weekly Hours

Solving for X with the JCT

Which calculator?: 1) SWH is 25 hours; what is the allocation?

2) Pay is $9,000; what is the FTE?

3) *Bonus: When would you use C?*

A

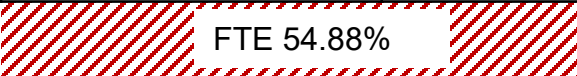| Calculating Scheduled Weekly Hours Based on Known Funds		
Begin Date		
End Date		*Fill in the blue cells to return back hours per week, based on 100% account distribution*
Monthly Rate		
Account Dist	100%	
Allocation Amount		
Fringe % (opt)	0.0%	
Fringe Amount	$ -	**Employee Type for Selected Fringe:**
Fringe + Cap	$ -	
Scheduled Wkly Hrs		
FTE		

B

Convert Known Amounts to Dollars or Percent		
Calculate funding totals for an overall date range and determine percent distributions for specific dollar amounts. Useful for grant accounts with limited funding.		
Click for details	$ Output	% Output
Monthly Rate		
Scheduled Wkly Hrs		
Account Dist	100%	
Begin Date		
End Date		
Allocation Amount	$ -	

C

FTE / Hours Calculator		
Input scheduled weekly hours to return FTE %	*Input FTE % to return scheduled weekly hours*	
	0.00	hrs
40	40	hrs
0.00%		FTE

Example: Professor Y

1) Teaching 1st term 6/1-7/15
2) Teaching 2nd term 7/16-8/15
3) Non-teaching at 50% July 1-August 15

Job	June	July	August
Teach 1st term	FTE 54.88%		
Non-teaching		FTE 50%	
Teach 2nd term		FTE 53.17%	
Combined FTE per period	54.88%	104.88%	103.17%

What's the problem here?

Example 1: Professor X

(1)   Teaching 1st term 6/1-7/15; (2) Teaching 2nd term 7/16-8/15; (3) Non-teaching at 50% 7/1-8/15

Step 1: List each job on a separate row, in chronological order from start date:

Job Title - One line per Add Job	Tenure status	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE
First Session Teaching 6/1-7/15	T/TT	Teaching - 1st session	12345	6/1	7/15	$77,700.00	$ -	$ 8,633.33	28.21	70.52%
Non-teaching	T/TT	Non-Teaching - Research		7/1	8/15	$77,700.00	$ -	$ 8,633.33	20.00	50.00%
Second Session Teaching 7/16-8/15	T/TT	Teaching - 2nd session	23456	7/16	8/15	$77,700.00	$ -	$ 8,633.33	40.00	100.00%

Step 2: Break up any overlapping jobs into separate time slices. *Keep in mind moveable vs. immoveable elements.* Recalculate SWH, FTE, allocation for each changed or new row.

First Session Teaching 6/1-6/30	T/TT	Teaching - 1st session	12345	6/1	6/30	$77,700.00	$ -	$ 8,633.33	0.00	0.00%
First Session Teaching 7/1-15	T/TT	Teaching - 1st session	12345	7/1	7/15	$77,700.00	$ -	$ 8,633.33	0.00	0.00%
Non-teaching	T/TT	Non-Teaching - Research		7/1	8/15	$77,700.00	$ -	$ 8,633.33	20.00	50.00%
Second Session Teaching 7/16-8/15	T/TT	Teaching - 2nd session	23456	7/16	8/15	$77,700.00	$ -	$ 8,633.33	0.00	0.00%

First Session Teaching 6/1-6/30	T/TT	Teaching - 1st session	12345	6/1	6/30	$77,700.00	$ -	$ 8,633.33	0.00	0.00%
First Session Teaching 7/1-15	T/TT	Teaching - 1st session	12345	7/1	7/15	$77,700.00	$ -	$ 8,633.33	0.00	0.00%
Non-teaching	T/TT	Non-Teaching - Research		7/1	8/15	$77,700.00	$ -	$ 8,633.33	20.00	50.00%

Step 1: First session teaching 7/1-15
- (40 SWH) - (Research 20 SWH) = 20 SWH available
- Use JCT to find allocation at 20 SWH for teaching

Step 2: First session teaching 6/1-30
- ($9,000 salary cap) - (2,064.49) = $6,935.51 owed
- Use JCT to find SWH for $6,935.51

Convert Known Amounts to Dollars or Percent

Calculate funding totals for an overall date range and determine percent distributions for specific dollar amounts. Useful for grant accounts with limited funding.

Click for details	$ Output	% Output
Monthly Rate	$ 8,633.33	
Scheduled Wkly Hrs	20.00	
Account Dist	100%	0%
Begin Date	7/1/2024	
End Date	7/15/2024	
Allocation Amount	$ 2,064.49	

Calculating Scheduled Weekly Hours Based on Known Funds

Begin Date	6/1/2024
End Date	6/30/2024
Monthly Rate	$ 8,633.33
Account Dist	100%
Allocation Amount	$ 6,935.51
Fringe % (opt)	0.0%
Fringe Amount	$ -
Fringe + Cap	$ 6,935.51
Scheduled Wkly Hrs	32.13
FTE	80.3341%

Fill in the blue cells to return back hours per week, based on

Employee Type for Selected Fringe:

Step 3: Enter results on spreadsheet

Teaching - 1st session	12345	6/1	6/30	$77,700.00	$ -	$ 8,633.33	32.13	80.33%	$6,935.51
Teaching - 1st session	12345	7/1	7/15	$77,700.00	$ -	$ 8,633.33	20.00	50.00%	$2,064.49
Non-Teaching - Research		7/1	8/15	$77,700.00	$ -	$ 8,633.33	20.00	50.00%	

Second and whole (12-week) summer session teaching jobs

In summer 2024 only, summer dates are 6/1 through ~~8/31~~ **8/15** BUT:

- Payment amount to instructors will not change ($9k salary cap) AND
- FTEs cannot exceed 100% for second session (7/16-8/15) or whole summer (6/1-8/15)

For many faculty, this will mean splitting compensation into **two BPs**:
a) Add Job (40 SWH max) **+**
b) OTP (for difference between salary cap and Add Job at 40 SWH)

Putting it all into practice

Scenario 1:

Dr. Peter Venkman is teaching *one course during each summer session*.

What do you do?

Step 1:

Get approval!

- If a faculty member is teaching two courses during the summer, during **different** *sessions*, the Academic HR Partner should get the approval of... **the department chair**.
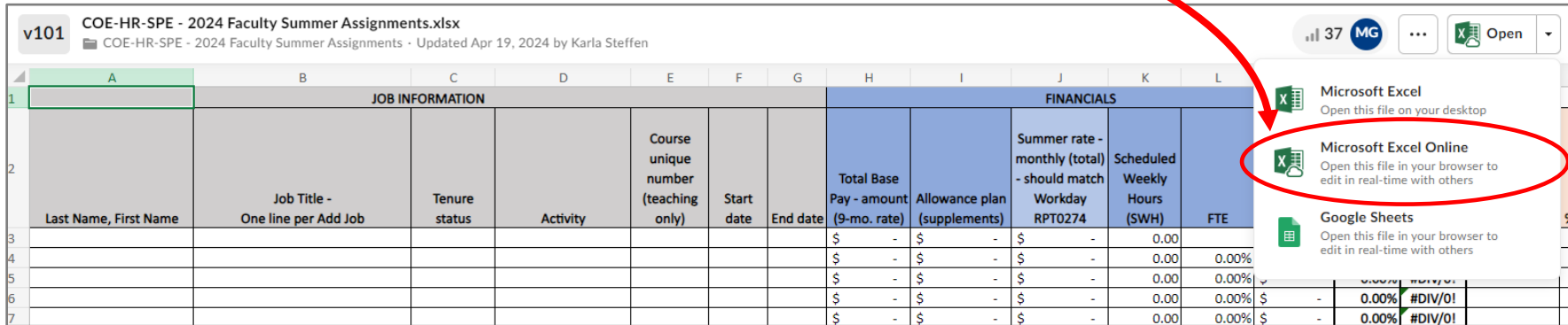
   Approval date must be noted in Workday BP comments.

> ⭐*Extra credit: What if both courses are during the **same** session?*

First and six-week summer session teaching jobs

Step 2:

a) Run RPT0806 (sup org) or RPT0274 (worker) to find summer academic pay rates:

			All Positions / Jobs							
Worker	EID	Supervisory Organization	Position	Scheduled Weekly Hours	Salary Plans	Total Base Pay - Amount	Allowance Plan for Summer Rate	Allowance Plan Total	Summer Rate - Monthly
Venkman, Peter	venkp1	GHOS (JM)	Associate Professor of Practice - Peter Venkman (venkp1)	40	Salary - Academic Salary, 77,700.00 USD Annual	$77,700			$8,633.33

b) Enter first session teaching info on department spreadsheet on Box:

JOB INFORMATION							FINANCIALS					
Last Name, First Name	Job Title - One line per Add Job	Tenure status	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
Venkman, Peter	First Session Teaching 6/1-7/15	NTT	Teaching - 1st session	73184	6/1	7/15	$77,700	$ -	$ 8,633.33	0.00	0.00%	$ -

Step 3: Use SUMMER 2024 JCT to calculate FTE/SWH or allocation

First and 6-week sessions only:

If monthly rate is **less than $6,088/month**, use top calculator to find allocation at 40 SWH.

X = Allocation

If monthly rate is **more than $6,088**, use bottom calculator to find FTE and SWH at $9,000 allocation.

X = SWH

Convert Known Amounts to Dollars or Percent

Calculate funding totals for an overall date range and determine percent distributions for specific dollar amounts. Useful for grant accounts with limited funding.

Click for details	$ Output	% Output
Monthly Rate	$ 6,088.00	
Scheduled Wkly Hrs	40.00	
Account Dist	100%	0%
Begin Date	6/1/2024	
End Date	7/15/2024	
Allocation Amount	$ 8,999.65	

For Monthly Rate input calculation, please see Workday's Propose Compensation Analytic - RPT0274

Calculating Scheduled Weekly Hours Based on Known Funds

Begin Date	6/1/2024	*Fill in the blue cells to return back hours per week, based on 100% account distribution*
End Date	7/15/2024	
Monthly Rate	$ 6,089.00	
Account Dist	100%	
Allocation Amount	$ 9,000.00	
Fringe % (opt)	0.0%	
Fringe Amount	$ -	**Employee Type for Selected Fringe:**
Fringe + Cap	$ 9,000.00	
Scheduled Wkly Hrs	39.99	
FTE	99.9874%	

Note: For known allocations, always go over rather than under:

Convert Known Amounts to Dollars or Percent		
Calculate funding totals for an overall date range and determine percent distributions for specific dollar amounts. Useful for grant accounts with limited funding.		
Click for details	$ Output	% Output
Monthly Rate	$ 8,400.00	
Scheduled Wkly Hrs	28.99	
Account Dist	100%	0%
Begin Date	6/1/2024	
End Date	7/15/2024	
Allocation Amount	$ 8,999.50	

Convert Known Amounts to Dollars or Percent		
Calculate funding totals for an overall date range and determine percent distributions for specific dollar amounts. Useful for grant accounts with limited funding.		
Click for details	$ Output	% Output
Monthly Rate	$ 8,400.00	
Scheduled Wkly Hrs	29.00	
Account Dist	100%	0%
Begin Date	6/1/2024	
End Date	7/15/2024	
Allocation Amount	$ 9,002.61	

Step 4: Enter JCT info on spreadsheet

Convert Known Amounts to Dollars or Percent		
Calculate funding totals for an overall date range and determine percent distributions for specific dollar amounts. Useful for grant accounts with limited funding.		
Click for details	$ Output	% Output
Monthly Rate		
Scheduled Wkly Hrs		
Account Dist		100%
Begin Date		
End Date		
Allocation Amount	$ -	
For Monthly Rate input calculation, please see Workday's Propose Compensation Analytic - RPT0274		

Calculating Scheduled Weekly Hours Based on Known Funds		
Begin Date	6/1/2024	
End Date	7/15/2024	Fill in the blue cells to return back hours per week, based on 100% account distribution
Monthly Rate	$ 8,633.33	
Account Dist	100%	
Allocation Amount	$ 9,000.00	
Fringe % (opt)	0.0%	
Fringe Amount	$ -	Employee Type for Selected Fringe:
Fringe + Cap	$ 9,000.00	
Scheduled Wkly Hrs	28.21	
FTE	70.5201%	

...ORMATION				FINANCIALS						
...enure ...tatus	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
...TT	Teaching - 1st session	73184	6/1	7/15	$77,700	$ -	$ 8,633.33	28.21	70.52%	$9,000.00

Step 5: Process in Workday (upload spreadsheet to BP)

Now… on to that second summer session job…

Adding a 2nd or whole summer session teaching job to spreadsheet

Step 1:

a) Run RPT0806 (sup org) or RPT0274 (worker) to find summer academic pay rates

b) Enter second session or whole summer teaching info on department spreadsheet on Box, using the following dates:
- Second session: 7/16-8/15
- Whole session: 6/1-8/15

Step 2: Use SUMMER 2024 JCT to calculate FTE/SWH or allocation

Second and 12-week sessions only

Which Side Calculator you use will depend on Academic Summer Monthly Rate:

Academic Summer Monthly Rate is **$8,808/month or more**:

Use BOTTOM calculator

Academic Summer Monthly Rate is **$8,807/month or less**:

Use MIDDLE calculator

Step 3: Enter JCT info on spreadsheet

Reminders for second/whole summer session:
- Monthly rate is $8,807 or less = top calculator
- Monthly rate is $8,808 or more = bottom calculator

Convert Known Amounts to Dollars or Percent		
Calculate funding totals for an overall date range and determine percent distributions for specific dollar amounts. Useful for grant accounts with limited funding.		
Click for details	$ Output	% Output
Monthly Rate	$ 8,633.33	
Scheduled Wkly Hrs	40.00	
Account Dist	100%	0%
Begin Date	7/16/2024	
End Date	8/15/2024	
Allocation Amount	$ 8,821.01	
For Monthly Rate input calculation, please see Workday's Propose Compensation Analytic - RPT0274		

	JOB INFORMATION										
Last Name, First Name	Job Title - One line per Add Job	Tenure status	Activity	Course unique number (teaching only)	Start date	End date	Pay - amount (9-mo. rate)	Allowance plan (supplements)	monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
Venkman, Peter	First Session Teaching 6/1-7/15	NTT	Teaching - 1st session	73184	6/1	7/15	$77,700	$ -	$ 8,633.33	28.21	70.52%	$9,000.00
Venkman, Peter	Second Session Teaching 7/16-8/15	NTT	Teaching - 2nd session	74440	7/16	8/15	$77,700	$ -	$ 8,633.33	40.00	100.00%	$8,821.01

What's the problem here?

Problem: SWH/FTE are maxed, but salary cap has not been met. Faculty member is still owed pay:

ATION					FINANCIALS					
ure tus	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
	Teaching - 1st session	73184	6/1	7/15	$77,700	$ -	$ 8,633.33	28.21	70.52%	$9,000.00
	Teaching - 2nd session	74440	7/16	8/15	$77,700	$ -	$ 8,633.33	40.00	100.00%	$8,821.01

Salary cap $9,000.00
Allocation $8,821.01
Deficit ($ 178.99)

Solution: One-Time Payment for deficit amount

Amount owed: $178.99

Step 4: Add to spreadsheet:

	JOB INFORMATION						FINANCIALS					
Last Name, First Name	Job Title - One line per Add Job	Tenure status	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
Venkman, Peter	First Session Teaching 6/1-7/15	NTT	Teaching - 1st session	73184	6/1	7/15	$77,700	$ -	$ 8,633.33	28.21	70.52%	$9,000.00
Venkman, Peter	Second Session Teaching 7/16-8/15	NTT	Teaching - 2nd session	74440	7/16	8/15	$77,700	$ -	$ 8,633.33	40.00	100.00%	$8,821.01
	Second session OTP 7/16-8/15						$ -	$ -	$ -	0.00	0.00%	$ 178.99

Step 5: Process One-Time Payment

Second and whole summer session instruction only:
If payment is owed due to abbreviated time period for academic calendar date shift, process an OTP as follows:

er	Second Session Teaching 7/16-8/15	NTT	Teaching - 2nd session	74440	7/16	8/15	$77,700	$	-	$	8,033.33	40.00	100.00%	$8,821.01
	Second session OTP 7/16-8/15						$	-	$	-	$	-	0.00	0.00%	$ 178.99

- OTP payment date: 8/15/2024
- Required OTP coverage dates: 8/16-31/2024
- OTP plan: Academic Activities
- Required comments:
  - August employment dates are condensed due to transition to new academic appointment calendar. OTP will bring faculty member up to $9k salary cap for this course.

See COE: 2024 Summer Faculty Employment Guidance > Second and Whole Summer sessions

Scenario 2:

Dr. Peter Venkman's second session course was cancelled. He is still teaching first session.

He will paid $3,500 from sponsored research for June 1-30.

First Name	Job Title - One line per Add Job	Tenure status	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
·ter	First Session Teaching 6/1-7/15	NTT	Teaching - 1st session	73184	6/1	7/15	$77,700	$ -	$ 8,633.33	28.21	70.52%	$9,000.00
·ter	NIH 6/1-30	NTT	Non-Teaching - Research		6/1	6/30	$77,700	$ -	$ 8,633.33	0.00	0.00%	$3,500.00

What do you do?

First Name	Job Title - One line per Add Job	Tenure status	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
ter	First Session Teaching 6/1-7/15	NTT	Teaching - 1st session	73184	6/1	7/15	$77,700	$ -	$ 8,633.33	28.21	70.52%	$9,000.00
ter	NIH 6/1-30	NTT	Non-Teaching - Research		6/1	6/30	$77,700	$ -	$ 8,633.33	16.22	40.54%	$3,500.00

Calculating Scheduled Weekly Hours Based on Known Funds		
Begin Date	6/1/2024	
End Date	6/30/2024	*Fill in the blue cells to return back hours per week, based on 100% account distribution*
Monthly Rate	$ 8,633.33	
Account Dist	100%	
Allocation Amount	$ 3,500.00	
Fringe % (opt)	0.0%	
Fringe Amount	$ -	**Employee Type for Selected Fringe:**
Fringe + Cap	$ 3,500.00	
Scheduled Wkly Hrs	16.22	
FTE	40.5406%	

What's the problem here?

First Name	Job Title - One line per Add Job	Tenure status	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
...ter	First Session Teaching 6/1-7/15	NTT	Teaching - 1st session	73184	6/1	7/15	$77,700	$ -	$ 8,633.33	28.21	70.52%	$9,000.00
...ter	NIH 6/1-30	NTT	Non-Teaching - Research		6/1	6/30	$77,700	$ -	$ 8,633.33	16.22	40.54%	$3,500.00

Problem:

6/1-30:
Teaching 28.21 SWH
+ Research 16.22 SWH
Total   **44.43** SWH

7/1-15:
Teaching 28.21 SWH
+ _____
Total   28.21 SWH

Solution:

6/1-30:
Teaching **23.78** SWH
+ Research 16.22 SWH
Total 40.00 SWH

7/1-15:
Teaching **37.47** SWH
+ _____
Total 37.47 SWH

rst Name	Job Title - One line per Add Job	Tenure status	Activity	Course unique number (teaching only)	Start date	End date	Total Base Pay - amount (9-mo. rate)	Allowance plan (supplements)	Summer rate - monthly (total) - should match Workday RPT0274	Scheduled Weekly Hours (SWH)	FTE	Allocation
er	First Session Teaching 6/1-6/30	NTT	Teaching - 1st session	73184	6/1	6/30	$77,700.00	$ -	$ 8,633.33	23.78	59.45%	$5,132.51
er	NIH 6/1-30	NTT	Non-Teaching - Research		6/1	6/30	$77,700.00	$ -	$ 8,633.33	16.22	40.54%	$3,500.00
er	First Session Teaching 7/1-15	NTT	Teaching - 1st session	73184	7/1	7/15	$77,700.00	$ -	$ 8,633.33	37.47	93.67%	$3,867.49

$5,132.51 + 3,867.49 = **$9,000.00**

Solution steps:

Step 1: Create two rows for 1st session teaching:
- **6/1-30** (overlaps research)
- **7/1-15** (no other commitments, full 40 SWH available)

Step 2: For 6/1-30 teaching, SWH is 40 – 16.22 (research commitment) = **23.78** SWH available

Step 3: Use JCT to convert 23.78 SWH to FTE, and enter both on spreadsheet

Step 4: Use JCT to calculate allocation at 23.78 hours and enter on spreadsheet

Step 5: Subtract June 1-30 allocation from $9,000 salary cap to find amount still owed:
- $9,000 – 5,132.51 = **$3,867.49**
- Enter result in allocation for Teaching 7/1-15

Step 6: Use JCT to calculate SWH for 7/1-15 allocation
- Enter result in SWH column: **37.47** SWH/93.67% FTE

Costing

Regular instruction accounts for T/TT faculty – **19-26XX-03**

- **03 subs for:**
  - T/TT summer teaching assignments, including Course development

- **04 sub for:**
  - TA/AI assignments

- **06 sub for:**
  - Professional-Track (Non-Tenure Track) assignments

- **09 sub for:**
  - Summer non-teaching assignments, including Graduate Advisor summer salary

26 accounts – used for non-teaching research assignments

Box > COE-HR-Faculty Summer Assignments > 2023 Faculty Summer Assignments > COE-HR-MATERIALS > COE policy

Research

Summer research jobs – Sponsored Project Information

- AMs and COERA and Center staff work together to complete picture of faculty research appointments for summer

- Faculty should in most cases prioritize research appointments over other teaching or non-teaching commitments due to contractual effort commitments

Research

For those units served by COERA (not Meadows, TexCEP, IPSI, NISOD, CCSSE):

- AMs direct faculty to COERA prior to engaging in summer appointment activities and discussions
- COERA meets with faculty to complete full sponsored project picture across all faculty sponsored project activities
- COERA will send completed appointment spreadsheet to AMs and fill out centrally shared Summer Assignment worksheet with the sponsored project appointment information

Recommendation: COERA uses a standardized appointment spreadsheet for sponsored project information and then uses that to complete the Summer Assignment worksheet – this allows the sponsored project appointment information to remain preserved separately and consistently for audit purposes

Research

For research centers with independent administration:

Center staff work with faculty to plan sponsored project information and then work with AMs to complete picture of faculty research appointments for summer.

Center staff: Do you have processes you engage in that you would like to share?

Research

Considerations:

- Institutional Base Salary
- Effort Limitations
- NIH Salary Cap

Research

Institutional Base Salary
[HOP 7-1010 VII. Responsibilities & Procedures](#)

Annual compensation paid for an individual's appointment (9 or 12 months), whether that individual's time is spent on research, teaching, administration, or other activities. Academic Salary and Endowments are included.

IBS does not include supplemental payments (one time or recurring), administrative supplements and/ or compensation for special programs and activities.

Additionally, IBS does not include payments from other organizations or income that individuals are permitted to earn outside of their institutional responsibilities, such as consulting.

Research

Institutional Base Salary
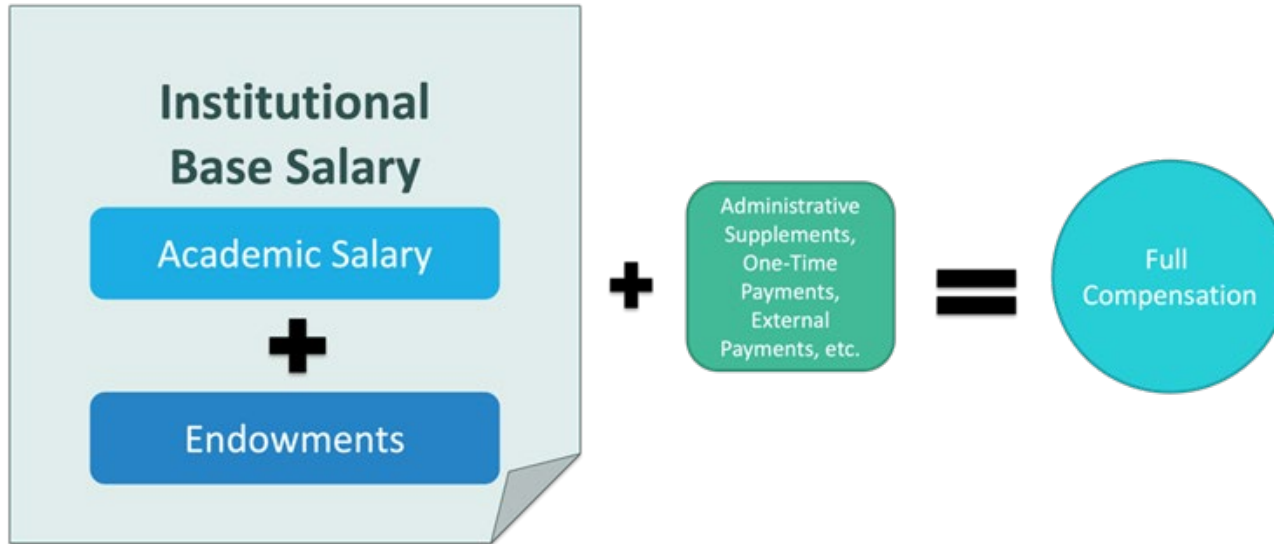
Research

Effort Limitations

[Guidelines for Charging Faculty Summer Salary to Sponsored Projects](#)

- Faculty cannot charge 100% to sponsored projects in any given month (academic month or summer month).

- Effort is limited to 95% on sponsored projects with 5% able to be charged to other less restrictive funds.
  - If a faculty wishes to charge 100% to grants they must submit the Attestation Form.

- In summer 2024, faculty have 2.5 months of effort to use. Jobs must end by August 15.

Research

National Institutes of Health (NIH) Salary Cap

NIH limits the amount of salary that can be charged to their sponsored projects

- Calendar Year 2024 salary cap = **$221,900** annualized (12-month)
- Amounts over the cap must be accounted for on non-sponsored project funding

NIH Salary Cap

2024 NIH Salary Cap
$221,900

Monthly Limit
$18,491

Salary over the cap = **UT Cost Share**

UT Cost Share portion should be supported by UT Funds

Research

COERA Appointment Process:

COERA's deadline for receiving on-time information from PIs is <mark>**May 1st, 2024**</mark>.
COERA plans to send faculty appointment information to department by May 8th at latest. Student appointments are prioritized with an earlier deadline.

- Faculty send requests for **ALL** summer appointments on their projects to COERA **[coera@austin.utexas.edu].** This includes their own time, other researchers, other faculty, GRAs, hourly employees, etc.

- They must take action on the *Summer Insurance Pre-Payment Cancellation* form no later than May 13th. They will be required to submit proof that they expect to have an appointment that meets the eligibility requirements listed on the *Summer Coverage for Faculty* page. COERA will provide a letter for upload once they meet and confirm with COERA staff that they will be able to have an appointment that meets this eligibility. They are required to submit the form themselves and COERA cannot provide the letter without confirming their eligibility.

- COERA meets to discuss the 95% Sponsored Project appointment limitation. COERA provided appointments have this already accounted for.

- Due to the requirements of the Summer Insurance Pre-Payment Cancellation, faculty need all three summer months (June 1 – August 15) accounted for at a minimum of 50% FTE (20 SWH). COERA provided appointments have this already accounted for.

Faculty summer insurance

All benefits-eligible 9-month faculty who work in spring are eligible for June-August insurance coverage, regardless of whether they work during those months.

The way they pay for premiums (dental, vision, dependents) though depends on summer employment.

9 annual paychecks, but 12 months of insurance coverage:
- June 1 check deductions are for May, but also June, July, and August (4 months total)

With full summer employment (June 1-August 15 at 20 SWH or more), premium pre-payment isn't needed – there are four paychecks.

If summer employment is processed by May 20, pre-payments won't happen.
If processed after May 20, faculty must request **pre-payment cancellation by May 13**.

See [HR: Summer Coverage for Faculty](#)

Faculty summer insurance 2024

No changes to summer 2024 from last year. Changes will take affect in summer 2025.

DEADLINES:
- May 13 - Faculty member: Submit Cancellation of Pre-Payment for Summer Insurance Coverage and upload documentation

- May 20 - Academic HR Partner: Summer jobs must be completed in Workday to avoid out-of-pocket summer premiums

Faculty can confirm their own summer insurance premiums in Workday. See HR: Summer Coverage for Faculty > "Premium Payment"

Resource: COE: 2024 Summer Faculty Employment Guidance > Faculty summer insurance coverage and the Pre-Payment Cancellation Form

Resources

Workday:
- [Preparing for Summer 2024](#)
- [Faculty Summer Jobs Process Overview Summer 2024](#)
- [Faculty Summer Job Scenario Matrix Summer 2024](#)
- [CSU Faculty Summer Jobs Initiator and Approver Checklist Summer 2024](#)

Costing: [Faculty Summer Job Costing Tool - Summer 2024 ONLY.xlsx](#)

Research
- [Guidelines for Charging Faculty Summer Salary to Sponsored Projects](#)
- [Texas Research: Academic Appointment Alignment](#)

Academic calendar date shift: [askUS: Faculty and Graduate Student Worker Appointment Date Changes](#)

COE:
- [COE: 2024 Summer Faculty Employment Guidance](#)
- [COE: Summer Appointments - Faculty](#)
- Box: COE-HR-Faculty Summer Assignments > 2024 Faculty Summer Assignments

Resources

COE Faculty Affairs folders on Box

File path → 〉 COE HR - Faculty HR 〉 COE-HR-Faculty Summer Assignments 〉 2024 Faculty Summer Assignments

NAME ↑   UPDATED

📁 COE-HR-C&I - 2024 Faculty Summer Assignments

📁 COE-HR-Dean's Office 2024 Faculty Summer Assignments

📁 COE-HR-EDP - 2024 Faculty Summer Assignments

📁 COE-HR-ELP - 2024 Faculty Summer Assignments

📁 COE-HR-KHE - 2024 Faculty Summer Assignments

📁 COE-HR-MATERIALS for 2024 Faculty Summer Assignments

📁 COE-HR-SPE - 2024 Faculty Summer Assignments

> 2024 Faculty Summer Assignments > **COE-HR-MATERIALS for 2024 Faculty Summer Assignments**

NAME ↑	UPDATED
📁 Academic calendar date shift info	Yesterday by Karla Steffen
📁 Guidance	Yesterday by Karla Steffen
📄 COE Faculty Summer Assignments Policy 2024.pdf V2	Today by Karla Steffen
📊 DOWNLOAD BEFORE USE - Faculty Summer Job Costing Tool - Summer 2024 ONLY.xlsx	Mar 19, 2024 by Karla Steffen
📊 DOWNLOAD BEFORE USE_ COE-HR - 2024 Summer Faculty - Template.xlsx	Feb 9, 2024 by Karla Steffen

Questions?