



The below are instructions for summer appointments.

- The May HRFE deadline for MN6 is 05/16/2018.
- The June HRFE deadline for MN7 is 06/15/2018.

AY17-18 newly hired faculty for Fall 2018 with a preceding summer appointment **must be** processed in conjunction with the fall appointment; this is required to determine SURS and benefit eligibility. All Tenure System faculty must have the appropriate approvals in place prior to the start of the summer appointment.

#### General Position and Job Information

Position Number	<p><u>Use existing pooled Summer Job positions first.</u></p> <p>P-class is <b>SMMR</b> and E-class is <b>MM</b> This set of coding should be used for all 9-month faculty who provide service over the entire academic year regardless of payment basis.</p> <p>Please see the <b>Term-by-Term</b> section for variance.</p>
Suffixes	<p><b>Suffixes</b> for the <b>academic summer jobs</b> will use “<b>S0</b>” to reflect a summer job. The S0 suffix will be used for identification purposes for institutional reporting. If the employee will hold a summer research job in the same unit in addition to the summer teaching job, units can separate the jobs out with the same summer position number using the ‘S’ suffix, with the next sequential numerical character starting with zero, e.g. S0, S1, S2....</p>
Effective Date	<p>Except for faculty teaching a Summer Session course, the effective date should be the date that actual service is being provided</p>
End Date	<p>Except for faculty teaching a Summer Session course, the end date should be the date that actual service is being provided</p>
Job Type	<p>Overload</p>
Title	<p>Title of job for which services will be provided should match the regular academic year appointment - “Summer” should <u>not</u> be included as a title modifier.</p>
FTE	<p>The FTE will represent service provided by the employee.</p>
Monthly Salary	<p>1/9<sup>th</sup> rate based on service FTE (i.e. 1/9<sup>th</sup> if 1 FTE, 1/2 of 1/9<sup>th</sup> if .5 FTE).</p>
Factor	<p>Represents length of summer pay in whole numbers: 1, 2 or 3 months. Partial month appointments would round up to the next whole number e.g., 06/16 –07/31 would round up to ‘2’.</p>
Job Change Reason	<p>JB007 (Add Summer Job) regardless if it is a new job or reappointment.</p>
FOAPAL	<p>Labor distribution information. It is not necessary to use multiple suffixes to reflect different FTE changes or labor distributions. Units have the ability to add future dated changes on reappointments as well as new summer jobs being added.</p>

#### Specific to Teaching through Summer Session

Please review the Summer Session dates and other information below:

- 4-week session should reflect the payroll dates of MN6 (05/16/2018– 06/15/2018)
- 8-week session should reflect the payroll dates of MN7-MN8 (06/16/2018 – 08/15/2018)

Percent Time Effort for Summer Session:

- 1 course in the 4 week session equals 100% time effort
- 2 courses in the 8 week session equals 100% time effort
- 1 course in the 8 week session equals 50% time effort

Faculty teaching effort is limited to 2/9ths compensation - faculty who teach 1 course in the 4-week session will be limited to 1 course (.5 FTE) in the 8 week session.

### **Specific to Administrative, Research or Teaching a Non-Summer Session course**

Banner will pay actual workdays of the partial months and will pay the whole assigned salary in any full months. Job comments should always be added to reflect the type of service being performed.

### **Summer Faculty with Administrative Appointment**

If the employee will have a summer faculty job in addition to the administrative appointment, both appointments should continue to be reflected as separate jobs over the summer. 9/12 service faculty who continue to hold an administrative appointment in the summer must use a summer pooled position number.

#### **Example:**

During the Academic Year, Professor John Smith holds a faculty appointment with a salary of \$100,000 with a 0% stipend of \$10,000 for the Director position.

Case 1: Faculty and Administrative summer service: During the summer he will teach a Summer Session course at 100% and also provide summer service in his administrative appointment from 5/16-06/15.

HRFE points: The summer faculty appointment will be reflected on the summer pooled position number using the instructions outlined in the **General Position and Job Information** section. For the summer administrative job use a summer pooled position number for the administrative position, with an S0 suffix, Job Type = Overload, Job Begin Date = May 16, FTE = 0 FTE, with a 1/9<sup>th</sup> monthly rate of \$1111.11 [ $\$10,000 / 9$ ].

Case 2: Administrative summer service only: During the summer, he will only provide 50% effort on the administrative appointment.

HRFE points: The summer job will be on the summer pooled position number reflecting the administrative appointment but with a suffix of **S0**; job type will be overload, the Job Begin Date will be May 16. The administrative title should be reflected however the 1/9<sup>th</sup> rate will be determined by taking the sum of the faculty line and the director appointment from academic year, e.g.  $\$12,222.22$  ( $110,000 / 9$ ). Since effort is 50%, job FTE will be .50 and a monthly rate of  $\$6111.11$  [ $\$110,000 / 9 * .5$ ].

### **Request for Exception to Limit on Summer Job**

Nine month faculty whose summer appointment salary exceeds the two-ninths of their full-time equivalent academic year salary must complete the Request for Exception to Limit on Summer Job. The dates of service should reflect the entire period of summer service that is being provided. The completed form should be attached to the HRFE transaction. Please make sure to include the signature of the Dean of the college (and all appropriate parties especially if summer service is being provided in several units)

Any requests exceeding 2 ½ ninths compensation must have prior approval by the Provost. Route the original Request for Exception to Limit on Summer Job form and the Addendum to Faculty Affairs, 2731 UH M/C 103 **prior to the start of the summer term** for review/approval. Any questions regarding the approvals should be directed to [FacultyAffairs@uic.edu](mailto:FacultyAffairs@uic.edu).

Approved forms must be attached to the HRFE transaction.

### **HRFE Instructions for Summer Job**

While some cases may vary, the majority of summer appointments are generated by adding or reappointing a summer job. The following steps will assist you with these transaction types:

#### **Adding new position:**

1. Once you have the person's ERV, select "Add a Job" under the Transactions tab.
2. Under e-class information, select M – Summer Job.
3. Under Job Dates tab, Indicate the Job Begin and Job End date
4. Under Position Selection, Indicate the position number (direct field entry or by searching)
5. In the Job Data tab, make sure to update the following fields:
  - a) Type the appropriate suffix
  - b) Update the Job Title
  - c) Factor: Update the factor field to reflect the number of summer service pay months
  - d) Job FTE
  - e) Monthly salary
  - f) TS-Org
  - g) FOAPAL information
  - h) Comments. Make sure to include appropriate job comments to reflect the appointment, e.g. type of service being performed: teaching, administrative or research; or percent rounded and showing calculations.

6. Hit Continue
7. Before routing the transaction, review transaction again
8. If required, attach the approved Request for Exception to Limit on Summer form.
9. Route to college

Important Note: Units will not be able to make a future dated labor distribution change with a job that is being added for the first time to Banner. Once processed in the HRFE system, units can submit LD changes to modify future FOAPAL changes. Please do not add different suffixes to reflect different FOAPAL changes if the duties are the same.

#### Reappointment Instructions:

1. Once you have the person's ERV, select Reappoint/Reactivate Job Transaction Type
2. Select the appropriate position
3. In the Reappointment/Reactivation Dates, indicate the summer appointment dates
4. In the Jobs accordion, review/update the below fields:
  - a) Job Title
  - b) Factor: Edit if there is change to the number of summer service pay months
  - c) Job FTE
  - d) Monthly Rate: Update based on the current academic year's salary
  - e) Change Reason: Update to reflect JB007
  - f) TS – Org
  - g) FOAPAL information
    - i. Make sure to review and update the information.
  - h) Comments. Make sure to include appropriate job comments to reflect the appointment, e.g. type of service being performed: teaching, administrative or research; or percent rounded and showing calculations.
5. Hit Continue
6. Review the information once again.
7. Route to college

Note: Units will be able to submit a future dated labor distribution change in conjunction with a reappointment transaction.

#### Term by Term Appointments

If a faculty member is appointed only for the summer term or only held an appointment for 1 term during the academic year, the summer term would be processed differently:

1. Position/Suffix = single position number with suffix "S\*" \*next sequential number. If a one-term appointment was held during the preceding academic year, use the same position number from the academic year but with 'S\*' suffix.
2. Job Comments: Reasoning for the job, summer service teaching, research, administrative, etc
3. Job Type = Secondary
4. P-Class = Corresponds to the title (not SMMR)
5. E-Class = AF
6. Factor = 9
7. Monthly Salary = 1/9 rate based on service FTE.
  - a. If the employee held an appointment during the academic year, the same annualized rate should be followed for the summer appointment.
8. Timesheet Org = Organization paying for the job
9. Change Reason = ADD SUMMER JOB (JB007)

#### New 9/12 hire for Fall 2018 Term with a Preceding Summer Appointment

If the faculty member is a brand new 9/12 hire for the upcoming fall but hired with a preceding summer job, then the summer appointment will need to be processed in a slightly different manner. This is required in order for the health benefits, life insurance and SURS to be correctly assessed. This preceding summer appointment **must be submitted along with the upcoming Fall appointment** information.

The faculty member will be benefit-eligible at the start of the summer appointment as long as the summer appointment is continuous with the academic year appointment and FTE is equal to 1.0. The faculty member is benefit eligible as long as there is NO BREAK between summer and fall appointment and if the summer appointment is at 1.0 FTE. Based on CMS requirements, a break in service (e.g., summer job 5/16 to 6/15 and then fall job starting 8/16/xx) will result in the summer appointment being ineligible for benefits and not SURS eligible. Please contact UIC HR Service Center - Faculty Processing if there is a break in service. Different HRFE processing steps will be required.

Add summer appointment first – indicate the start and end dates

1. When searching or creating position, select an AA e-class at the position level.
2. Make sure the position is included in the budget. Do not make any changes to the e-class at the position level – this should remain as AA. You will get a warning message about the position not matching – click continue again
3. At the Job Data screen, update the job e-class to AE. Update the suffix to S0. The factor will change to 9 and the monthly rate will convert to the 1/9<sup>th</sup> rate. Double check your stipend based on the FTE. Change the leave category code to E7. The job reason should be New Hire, HR001. Hit continue
4. Make sure the job type is primary. Review all of the information and then save.

Add the fall appointment

1. Click the add change button. Change the view data to the start of the fall term 8/16 and hit View
2. Under Transactions, select “Add a job”.
3. You will be brought back to selecting e-class – select the same as the summer appointment (AA). Click continue.
4. The position number should be the same as the summer, but use the ‘00’ suffix.
5. The Job Begin Date should be 8/16/xx. No end date is required unless the faculty member is visiting or has a visa end date. Job Change reason should be ‘Add Job JB001’. Hit continue.
6. Make sure the job type is primary. Review all of the information and then save.

### **Retire Rehires with a Summer Appointment**

Same HRFE steps as Term by Term Appointments (Note: Please review previously-held positions to “reappoint” with an S0 suffix). HRFE must include the pre-approved Retire Rehire form along with the employee’s SURS Statement of Annuity.

**If you have questions regarding a specific processing scenario not addressed above, please contact UIC HR Service Center at [UICHRServiceCenter@uillinois.edu](mailto:UICHRServiceCenter@uillinois.edu) or call (312)355-2412.**

### **Additional Resources**

HR Front End Systems Support and Training

[https://www.hr.uic.edu/systems\\_support/h\\_r\\_front\\_end/](https://www.hr.uic.edu/systems_support/h_r_front_end/)

Policy 110 Guidelines for Summer Appointments

<http://faculty.uic.edu/webguide/> Section 1. Current Faculty

Request for Exception to the Limit on Summer Appointment

<https://faculty.uic.edu/files/2014/07/110-SummerAppointmentsForm.pdf>

Request for Exception to the Limit on Summer Appointment Addendum

<https://faculty.uic.edu/files/2014/07/110-SummerAppointmentsAddendum.pdf>