

SUMMER 2014
DEPARTMENT PLANNING GUIDE

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2014 SUMMER SESSIONS CALENDAR

November 1	Departments given access to schedule their programs.
December 13	Last day for departments to schedule their summer programs. Scheduling access temporarily suspended.
February 1	Regular Summer Sessions registration and enrollment open to UCLA students. Institute Registration opens to all students.
March 1	Regular Summer Sessions registration and enrollment open to all students. Catalog mailed.
June 23	Session A begins.
July 2	Faculty and TA pay date (First 6-week, 8- and 10-week session).
July 4	Independence Day Holiday
July 16	Faculty and TA pay date (First 6-week session and 10-week session).
July 30	Faculty and TA pay date (8-week session).
August 1	6-week Session A ends.
August 4	Session C begins.
August 13	Faculty and TA pay date (10-week session, Session C).
August 15	8-week Session ends. Last day for 100% refund (Session C).
August 27	Faculty and TA pay date (Session C).
August 29	10-week Session A ends.
September 1	Labor Day Holiday
September 12	Session C ends.
October 15	Spending stops in preparation for the revenue sharing process.

OVERVIEW

Steps to a Successful Summer Program

I. Review the Schedule and Survey Your Faculty

Review your courses from last year and assess which ones worked and which didn't. If you wish to ask your faculty to request summer teaching assignments, distribute copies of the [Summer Sessions Planning Guide](#) addressed to all faculty during your fall quarter department meeting. Since you will need to schedule your program by early December, we recommend that you set a deadline for faculty summer teaching requests that is early enough to give you time to process them.

II. Select the Courses

Keeping the budget and course demand in mind, select the courses you wish to offer. Summer Sessions may restrict your department to a specific number of courses within a given budget limit. We may ask that you exclude classes with a history of low enrollments, and that you limit your courses at certain times of day to allow optimum use of classrooms.

III. Review your Budget and Schedule your Courses

Initial scheduling access is open to your department from November to early December and again from January to the end of the summer term.

- **Proposed Program Budget**

Summer Sessions generates a budget based on what you schedule. You may make changes to the budget as long as your department as a whole, and preferably each course, is not in deficit. Your password protected budget can be viewed online; [click here](#) to see your department's budget.

- **Schedule your Courses**

Courses offered last summer roll over in the scheduling system to this summer, just as they roll from quarter to quarter during the academic year. You may make changes to your program the same way you do in the academic year, with a few exceptions that are unique to Summer Sessions.

Summer Sessions will review your program to ensure that program size, budgeting, and scheduling meet our guidelines. The approved information will be included in our Web site and in the Summer Sessions schedule. If you are interested in offering a new Summer Institute program, please contact us at institutes@summer.ucla.edu. Summer Institute program proposal submission deadlines are as follows:

Registration Start Date	Submission Deadline
February 1, 2014	November 15, 2013
March 1, 2014	January 15, 2014
April 15, 2014	March 1, 2014

SUMMER SESSIONS SCHEDULE OF CLASSES

Academic departments schedule Summer Sessions courses in SIS. The scheduling process is largely the same as during the academic year, but there are a few steps that are unique to Summer Sessions. If you have any questions about the process, contact [Tony Beck](#) x59774.

Roll over: The schedule from last summer rolls over to this summer. You may leave your schedule as it is, or you may add, delete, or modify your courses.

Calendar: Departments have full access to make changes to their Summer Sessions schedule from November to early December and limited access from January to the end of the summer term.

Final Examinations: Normally final examinations are held during the last class meeting. If you would like to schedule a separate final examination time or would like extended time on the last class meeting, contact [Tony Beck](#) x59774 with the pre-set exam code or extended time request to verify room availability. Exam codes for summer can be viewed on OASIS screen "FXB", term "141"..

Several items require special attention:

Enrollment restrictions: Include enrollment rule codes to restrict enrollment to certain types of students, and to screen for requisites. Only UCLA students are screened for requisite and class-level requirements.

Schedule notes: Class Schedule Note Codes are listed below. Many students read only the schedule and not the course descriptions. Schedule notes are critical in communicating information that will guide students. If you want a note that is not listed, send a brief e-mail to [Tony Beck](#) x59774.

Session codes: Summer Sessions requires the use of [session codes](#) (below) in course scheduling.

Course SRS#: The last three digits of the course SRS# require special coding (details below).

Class Schedule Guidelines

Classroom space is at a premium during the summer. By scheduling your courses back-to-back between 8:30 and 5:30, you allow maximum classroom usage. The following sample class schedule demonstrates the use of one classroom for four summer courses.

Use this model for scheduling your program:

Zoology	10	TR	8:30 - 10:35	Dodd 162
	40	MTWRF	11:30 - 12:20	Dodd 162
	100	MWF	1:00 - 2:20	Dodd 162
	110	TR	3:15 - 5:20	Dodd 162

The following approved scheduling patterns are minimums for assigning course times:

Six-Week Sessions

MTWRF (50 mins.)	MWF (1 hr., 20 mins.)	TR (2 hrs., 5 mins.)
8:30 - 9:20	8:30 - 9:50	8:30 - 10:35
9:30 - 10:20	10:00 - 11:20	10:45 - 12:50
10:30 - 11:20	11:30 - 12:50	1:00 - 3:05
11:30 - 12:20	1:00 - 2:20	3:15 - 5:20
12:30 - 1:20	2:30 - 3:50	
1:30 - 2:20	4:00 - 5:20	
2:30 - 3:20		
3:30 - 4:20		
4:30 - 5:20		

Eight- and Ten-Week Sessions

MTWRF between 8:30 a.m. - 6:00 p.m.

Sample Classroom Schedule

Russian 10 MTWRF 8:30 - 12:20 Dodd 162

Russian 20 MTWRF 12:30 - 4:30 Dodd 162

Ten-Week Sessions

Once per week: two hours and thirty minutes.

Session Codes

Session codes are entered on the COD screen. They control the dates and the fees for the courses. The most common session codes are:

6A	Six-week Session A courses
8A	Eight-week Session A courses
1A	Ten-week Session A courses
6C	Six-week Session C courses

The other session codes are normally used by Summer Sessions only.

SRS Number code

Unlike in the regular session, the last three digits of the nine-digit SRS number (111-222-xxx) are specially coded in Summer Sessions:

Coding the last three digits of the SRS#

First	Section Number
Second	Session Number 1 = Session A 3 = Session C
Third	0

The SRS number is coded in the “Add Act Type & Last 3 Digits of SRS#” field of the CM1 screen in SIS. For example, a course with the SRS number 111-222-110 would be the first section of a course in Session A.

Instructor Function Code

Instructor function codes are used to assemble the faculty report. Enter the appropriate instructor function code in the CM2 screen in SIS:

- 01 - Primary Instructor. Has direct instructional contact with the student and is in charge of the course.
- 02 - Secondary Instructor. Has direct instructional contact with the student but is not in charge of the course (e.g., Teaching Assistant).
- 03 - Instructor in charge. Has no instructional contact, but is in charge of the course (e.g., a professor supervising a TA instructor).

Class Schedule Note Codes

Many students refer only to the Schedule of Classes, so any information you want them to have should appear there as a Schedule Note.

	Schedule Note Codes
AD	ADDITIONAL HOURS TO BE ARRANGED
AT	MEETS SCHOOLS OF THE ARTS & THEATERFILMTV GEN ED
ED	ENROLL IN DEPARTMENT OFFICE
FA	MEETS FINE ARTS GENERAL EDUCATION REQUIREMENT
FD	DIS SECTIONS ARE ASSIGNED AT FIRST LECTURE MEETING

FL	LAB SECTIONS ARE ASSIGNED AT FIRST LECTURE MEETING
FQ	QIZ SECTIONS ARE ASSIGNED AT FIRST LECTURE MEETING
FR	REC SECTIONS ARE ASSIGNED AT FIRST LECTURE MEETING
GH	MEETS L&S AND FINE ARTS AMER H&I & GE REQUIREMENT
HI	MEETS AMERICAN HISTORY AND INSTITUTION REQUIREMENT
ID	ENROLLMENT IN DIS WILL ENROLL YOU IN LECTURE
IL	ENROLLMENT IN LAB WILL ENROLL YOU IN LECTURE
IQ	ENROLLMENT IN QIZ WILL ENROLL YOU IN LECTURE
IR	ENROLLMENT IN REC WILL ENROLL YOU IN LECTURE
LB	LABORATORY FEE REQUIRED
LC	LEARNING CENTER SECTION
LD	ENROLL IN DEPARTMENT & LABORATORY FEE REQUIRED
LE	LIMITED ENROLLMENT
LF	MEETS L&S AND FINE ARTS GENERAL EDUC REQUIREMENT
LL	LIMITED ENROLLMENT AND LABORATORY FEE REQUIRED
LM	LIMITED TO STUDENTS IN MAJOR DEPARTMENT ONLY
LP	LIMITED ENROLLMENT WITH FEE
LS	MEETS L&S GENERAL EDUCATION REQUIREMENT
PA	PLACE HOLDING FEE AND AUDITION REQUIRED
PH	PLACE HOLDING FEE REQUIRED
RA	RESTRICTED TO UCLA MA/PHD CANDIDATES
RS	RESTRICTED TO UCLA MS/PHD CANDIDATES
TF	MEETS SCHOOLS OF THE ARTS & THEATERFILMTV GEN ED

PERSONNEL

General Policies

Academic departments initiate the hiring of instructors by preparing hiring forms for instructors who need them, entering their summer appointments in EDB, and entering their pay transactions in PTR. For instructors from other UC campuses, payments are processed by and paychecks are issued through their home campuses, using the one-time payment form process; see the [PTR On-line User Guide](#) section E, Special Processes.

The academic department also prepares hiring forms for apprentice teaching personnel (TAs) and personnel paid by the hour (e.g., readers) and enter their appointments in EDB. The rates for apprentice teachers are set by the Office of Summer Sessions; the rates for readers and other hourly personnel are the same as in the regular year.

The academic department reconciles payments with the general ledger.

If you have any questions please contact [Steven Angelo](#) x64933.

I. Faculty Compensation

Faculty compensation is based on an instructor's nine-month academic annual salary. It is a percentage of the lowest ninth-month academic annual salary, exclusive of administrative stipends, above-scale payments, staff appointments, or other compensation, in effect June 30 of the summer in which the instructor is teaching. Increases in pay that are effective July 1 or after are not included.

a. Determining Annual Salary

▪ Continuing Faculty

UCLA faculty, visiting faculty with an existing appointment at UCLA, and faculty from other UC campuses will be paid using the same ninth-month annual rate as in the academic year.

UCLA instructors with eleven-month annual salaries must have a nine-month annual salary established for them to calculate their summer stipend (an eleven-month annual salary should not be used to calculate a Summer Sessions stipend). See below for ways to establish a nine-month annual salary.

▪ Instructors from Other Institutions

The annual salary for visiting instructors who hold academic titles at comparable institutions is selected from the Academic Standard Table of Pay Rates, table [39-A](#) or [39-B](#), at a level that is close to the nine-month academic annual salary at the home institution.

- **Instructors with No Nine-Month Annual**

All summer stipends must be based on a nine-month annual, but some instructors don't have an existing nine-month annual. They may, for example, be new to UCLA, or have an eleven- or twelve-month annual because of their appointment type. A nine-month annual salary can be established in a few ways:

- A nine-month annual salary that has been established for the instructor in the recent past can be used.
- The department can consider the level at which it would hire an instructor to teach, and select an annual salary that is close to that level from the [Unit 18 Academic Standard Table of Pay Rates](#) for lecturers or the Academic Standard Table of Pay Rates, table [39-A](#) or [39-B](#), for other academics. For example, if a department would hire an instructor at a level close to Assistant Professor step III, an annual salary close to the nine-month Assistant Professor step III level can be selected from the Unit 18 Academic Standard Table of Pay Rates and used to calculate a summer stipend.
- For instructors with an eleven-month appointment, if no other method is possible, a nine-month annual that is close to 81% of the eleven-month annual salary can be chosen from the appropriate Academic Standard Table of Pay Rates. Instructors with eleven-month annual salary appointments are limited to teaching one 50% time course per session.
- For UCLA staff with appointments at 50% time or more, a nine-month annual salary must be established from the [Unit 18 Academic Standard Table of Pay Rates](#) at a level comparable to the rate they would hold if given an academic appointment in the department. They may be paid for teaching a maximum of one course per session. Staff employees in non-exempt titles must reduce their vacation leave balance by the amount of time they spend on Summer Sessions instruction and related activities (such as office hours and course preparation) so that they do not become eligible for premium overtime compensation. Staff employees in exempt titles need not reduce their vacation leave balance.

Once an instructor has established an annual rate from the UCLA Academic Standard Table of Pay Rates, range adjustments are permissible according to the Table. Increases in addition to range adjustments are also permissible; for example, by a promotion at the instructor's home institution. A decrease in annual salary from previous years is also permissible for faculty with no established UCLA academic year annual salary.

- b. Stipend Calculation**

Academic Personnel Manual section [661-18](#) defines normal compensation for a standard Summer Sessions instructional load. One four or five unit course is normally considered 50% of full time. Below is a chart for stipend calculations based on a percentage of the academic year rate*.

	<i>Six-week session</i>	<i>Eight-week session</i>	<i>Nine-week session</i>	<i>Ten-week session</i>
50% Time (one 4 or 5 unit course)	8.5%	11%	12.5%	14%
100% Time (two 4 or 5 unit courses)	17%	22%	25%	28%

**Salary rate in effect June 30 of the calendar year in which the Summer Session begins.*

[Click](#) for a workbook that contains three standard tables with calculated summer stipends.

c. Compensation Limits

Maximum percent of annual that can be paid in a session is equal to the full time rate (e.g., 17% of annual in a six-week session). Maximum percent of annual that can be paid in a summer is 33%.

University of California limits earnings beyond nine-month academic annual salary to 33% of that nine-month academic annual salary. This includes Summer Sessions compensation and contract and grant awards. So the most an instructor may earn by teaching in Summer Sessions is 33% of nine-month academic salary. All instructors, including visiting instructors, are subject to this limit.

II. Academic Student Employees (ASE)

[Article 24 of the system wide agreement](#) covering Academic Student Employees covers employment of all ASEs (tutors, readers, special readers, and teaching assistants) in Summer Sessions.

Minimum Qualifications for holding an academic apprentice appointment in summer are the same as during the academic year. The [UCLA Graduate Division](#) Web site contains general descriptions of job duties and departmental contacts.

All hiring processes and appointments are initiated by the academic departments. Please refer to the [UCLA Graduate Division](#) for departmental contact information regarding summer ASE positions.

ASE Positions

Summer Sessions works with academic departments and academic support units to estimate the approximate number of ASE positions that might be available for summer employment. The number of opportunities for summer ASE positions is affected by student enrollment estimates and the specific curricula of hiring departments. [Click here](#) for an estimate of the number of positions available. Also, the [UCLA College of Letters and Science](#) Web site provides information on summer tutoring opportunities.

Employment Non-Discrimination Statement

Within the limits imposed by law or University regulations, the University shall not discriminate against or harass any ASE on the basis of race, color, religion, marital status, national origin, ancestry, sex, sexual orientation, physical or mental disability, medical condition, HIV status, status as a covered veteran, age, citizenship, political affiliation and Union activity. For the purposes of this statement, medical condition means any health impairment related to or associated with a diagnosis of cancer, or health impairments related to genetic characteristics.

III. Apprentice Teaching Personnel

Apprentice teaching personnel are graduate students hired by an academic department under one of the following titles: Teaching Assistant, Teaching Associate, or Teaching Fellow. The same University of California definitions, policies and procedures regarding the appointment and use of graduate student assistants in UCLA teaching titles also apply to Summer Sessions appointments. These can be found in the [Academic Apprentice Personnel Manual](#) which is maintained by the Graduate Division. The department chair is responsible for ensuring these policies and procedures are followed.

Apprentice teaching personnel should be appointed to the level appropriate as of the beginning of the fall quarter following the summer term in which they will teach.

Summer Sessions [pay scales](#) for apprentice teaching personnel are fixed, by-agreement amounts.

Since any request for exceptions or changes to University policy on the employment of graduate student assistants in Summer Sessions courses must be submitted to the Dean of the Graduate Division or appropriate Academic Senate committee, such requests should be made at least two weeks prior to the beginning date of the appointment and department chairs should convey the provisional nature of any proposed appointments whenever approval is still pending.

IV. Invitation Letters

A [faculty invitation letter template](#) is available for departments wishing to use one. (Grades are due ten days after the session ends.)

A [TA invitation letter](#) template is available for departments wishing to use one.

V. Teaching Titles

Continuing UC instructors are appointed to the same nine-month academic titles they hold as of June 30 of the summer in which they are teaching, except instructors represented by University Council-American Federation of Teachers Non-Senate Instructional Unit, who are appointed with the title Lecturer in Summer Sessions (title code 1550).

Visiting instructors who hold an academic appointment at their home institution should be appointed using the "Visiting" version of their home institution title, such as "Visiting Professor."

UCLA instructors with emeritus appointments should be appointed using the "Recalled" version of their title, such as "Professor Recalled."

UCLA instructors with eleven-month appointments, instructors with staff appointments only, and visiting instructors who do not otherwise hold an academic title are appointed with the title Lecturer in Summer Sessions (title code 1550).

An instructor's **description of service (DOS) code** for a Summer Sessions appointment is SSC for regular full-time faculty who are in the retirement system, and SST for visiting and other faculty and for TAs.

VI. Employee Database System (EDB)

Academic departments enter Summer Sessions appointments in EDB (the Online Employee Database System). The hiring process for Summer Sessions instructors is the same as for other academic appointments, except for some variations in the way the appointment is entered in the EAPP screen (explained below). You may enter Summer Sessions appointments online in EDB at any time.

For new hires, follow the guidelines in the [EDB Entry/Update User Guide](#) beginning with section C2.0. For rehires see section C4.0. For continuing UCLA instructors, you may go directly to the EAPP screen; see section B1.0 for detailed descriptions of EAPP fields.

In addition to entering the appointment in EDB, you must also schedule payments for faculty and TAs in PTR (the Online Payroll Time Reporting System). See below for PTR instructions for Summer Sessions payments.

a. EAPP Screen Entry for Summer Sessions Appointments

Academic departments enter Summer Sessions appointments in EDB (the Online Employee Database System). The hiring process for Summer Sessions instructors is the same as for other academic appointments, except for some variations in the way the appointment is entered in the EAPP screen (explained below). You may enter Summer Sessions appointments online in EDB at any time.

To ensure processing in time for Summer Session pay dates, we recommend that you enter routine appointments by the Friday before classes start for each session. For those whom you need to hire during the first week of classes (such as new hires and TAs based on enrollment), enter hires by Tuesday of the first week of each session:

	<i>Enter routine appointments by</i>	<i>Enter in-person appointments by</i>
A Session:	June 20, 2014	June 24, 2014
C Session:	August 1, 2014	August 5, 2014

In addition to entering the appointment in EDB, you must also schedule payments for faculty and TAs in PTR (the Online Payroll Time Reporting System).

▪ **Appointment Data**

To add a new appointment, go to the command line at the bottom of the EAPP screen to the right of the arrow (==>). Type "Add appt" and press the enter key.

Action: For additional employment, enter 13. Leave blank for new hires and rehires (the action code for them is system-derived).

Pgm: The program code is system-derived so you may leave this field blank. When you update, it will change to "A" for academic.

Typ: The type code is "5" for academic.

Bas, Pd Ovr: Leave blank for faculty. For TAs, enter 9 over 9.

Appt Begin: Enter the date that the Summer Sessions appointment begins, usually the first day of the session. All dates are entered in 6-digit format with no spaces or non-numeric characters: MMDDYY.

Appt End: Enter the date that the Summer Sessions appointment ends, usually the last day of the session. All dates are entered in 6-digit format with no spaces or non-numeric characters: MMDDYY.

Summer Sessions 2014 dates:

<i>Session</i>	<i>Begin Date</i>	<i>End Date</i>
A 6 week	062314	080114
A 8 week	062314	081514
A 9 week	062314	082214
A 10 week	062314	082914
C	080414	091214

Dur, Dept: Leave blank.

Title: Enter the title code for the appointment. For faculty, the title code appears on Summer Sessions payroll reports that we send to you.

Apprentice title codes and titles:

<i>Title code</i>	<i>Title</i>	<i>Appears in EDB as</i>
2310	Teaching Assistant	TEACHING ASSISTANT - GSHIP
1506	Teaching Associate	ASSOC IN __ -9-MO - 1/9-GSHIP
2300	Teaching Fellow	TEACHING FELLOW - GSHIP

Grade, %Full: Leave blank for faculty and TAs. Enter the percentage of time in %Full for personnel paid by the hour.

F/V: Enter "F" (fixed) for faculty and TAs; enter "V" (variable) only for personnel paid by the hour.

Ann/Hr Rate: This field is system-derived so you may leave it blank.

TA summer pay calculation method: A Teaching Assistant, Teaching Associate, or Teaching Fellow, who is not an Instructor of Record and has a 50% appointment during summer session, shall be compensated at the rate resulting from dividing the academic term gross salary by the maximum workload of 220 hours (quarter) or 340 hours (semester) and multiplying the result by 120 hours (for a six-week summer session). This compensation rate shall apply proportionately to other percent appointments and/or to summer sessions of different lengths.

2014 pay rates for TAs (same as 2013):

	<i>Six-week session</i>	<i>Eight-week session</i>	<i>Nine-week session</i>	<i>Ten-week session</i>
Teaching Assistant				
50% Time	\$3,210	\$4,280	\$4,815	\$5,349
100% Time	\$6,420	\$8,560	\$9,630	\$10,698
Teaching Associate				
50% Time	\$3,584	\$4,778	\$5,376	\$5,973
100% Time	\$7,168	\$9,556	\$10,752	\$11,946
Teaching Fellow				
50% Time	\$3,764	\$5,018	\$5,646	\$6,273
100% Time	\$7,528	\$10,036	\$11,292	\$12,546

Rt, Sch, Time, Lv: For faculty and TAs, enter "B," "MO," "Z," "N." For personnel paid by the hour, enter "H," "BW," "Z," "F."

- **Distribution Data**

Enter one distribution per session. To add a distribution, go to the command line at the bottom of the EAPP screen to the right of the arrow (==>). Type "Add dist" and press the enter key.

Actions: Leave blank.

L: The location is "4."

Acct: Enter the Summer Sessions account number assigned to your department: 4099xx. Your department's account number is listed at the top of the payroll reports we send to you.

CC: Leave blank.

Fund: The fund in even-numbered calendar years is 20290; in odd-numbered years 20291 (Travel Study uses 20298 and 20299; Special Programs uses 20288 and 20289).

Proj: Leave blank (except for Travel Study and Special Programs which are assigned a project code).

Sub: Use sub 7 for faculty, sub 2 for TAs, and sub 5 for personnel paid by the hour.

FTE, Dis %: Leave blank for faculty and TAs. Enter the percentage of time in Dis % for personnel paid by the hour.

Pay Begin: Enter the date the distribution begins, usually the same as the date the session begins (session dates are listed above under "Appt Begin").

Pay End: Enter the date the distribution ends, usually the same as the date the session ends.

Step, O/A: Leave blank for faculty and TAs. Enter step for personnel paid by the hour.

Rate/Amount: For faculty and TAs, enter the portion of the stipend to be paid in this distribution (if this is the only distribution, enter the full stipend). For personnel paid by the hour, enter the hourly rate to four decimal places.

DOS: Enter the DOS code "SSC" for regular, full-time faculty who are in the retirement system, and "SST" for visiting and other faculty. For TAs, enter "SST." Enter "REG" for personnel paid by the hour. (Use "WOS" for instructors appointed on a without salary basis.)

PRQ, DUC, WSP: Leave blank.

b. Online Time Reporting

Academic departments enter Summer Sessions pay transactions in PTR (the Online Payroll Time Reporting System). Entries are made using the EDFT (One Time Payment) screen in PTR. You may enter pay transactions any time after the Summer Sessions appointment has been entered in EDB, and before published Payroll deadlines for each pay date. The stipend for each session should be divided equally among the pay dates for that session. The following shows what to enter in the "Pay Cycle," "Pay End," and "Per End" fields of the EDFT screen. (Pay Cycle and Pay End information goes at the bottom of the screen; Per End information goes in the body of the transaction.)

<i>A Session, June 23 - August 1, 2014:</i>			
Pay Date	Pay Cycle	Pay End	Per End
7/2/2014	B1	062114	070514
7/16/2014	B2	070514	080214
<i>Eight-Week Session, June 23 - August 15, 2014:</i>			
Pay Date	Pay Cycle	Pay End	Per End
7/2/2014	B1	062114	070514
7/30/2014	B1	071914	081614
<i>Nine-Week Session, June 23 - August 22, 2014:</i>			
Pay Date	Pay Cycle	Pay End	Per End
7/2/2014	B1	062114	070514
7/16/2014	B2	070514	071914
8/13/2014	B2	080214	082314
<i>Ten-Week Session, June 23 - August 29, 2014:</i>			
Pay Date	Pay Cycle	Pay End	Per End
7/2/2014	B1	062114	070514
7/16/2014	B2	070514	071914
8/13/2014	B2	080214	083014
<i>C Session, August 4 - September 12, 2014:</i>			
Pay Date	Pay Cycle	Pay End	Per End
8/13/2014	B2	080214	081614
8/27/2014	B1	081614	091314

ACCOUNTING

Departments are responsible for initiating purchases, reconciling ledgers monthly, and making routine corrections to their ledgers. Expenses must be within approved budget targets.

I. Accounts, Ledgers, and Expenses

Each department has its own account number for Summer Sessions expenses. The account number does not change, but the fund number changes yearly. The fund number for even-numbered calendar years is 20290; for odd-numbered years it is 20291.

All spending must be completed by the last day of Session C. No new charges may be incurred after this date, although it is possible that some charges might not be reflected on the ledger until the following month. Exceptions must be approved by Summer Sessions. Unapproved late expenses will not be honored. Summer Sessions accounts will be closed on October 15 in preparation for the revenue sharing process.

Summer Sessions funds are unallocated, so they will show a deficit until the July ledger of the following year.

II. Fiscal Year

The Summer Sessions fiscal year is unique because it coincides with the calendar year (January-December), not with the normal campus fiscal year (July-June). To accommodate this difference, the Accounting Office makes entries in the June ledger that may appear unusual. Please contact [Cathy Ruiz](#) x50623 if you need assistance in interpreting the ledger.

III. Budget

Once an academic department's budget target has been set, you may make changes to it as long as you do not exceed the target.

SUMMER SESSIONS REVENUE SHARING

I. What is the purpose of revenue sharing? What are its goals?

The purpose of revenue sharing is to provide appropriate incentives to the faculty and departments that contribute to the success of Summer Sessions. It is intended to balance quality academic offerings with fiscal responsibility.

When departments see how they benefit from a healthy Summer Sessions, they may, as a result,

- Hire the most talented instructors;
- Offer courses most needed by students;
- Consider the development of innovative programs or scheduling that might produce substantial additional revenues;
- Reduce unnecessary expenses (sub 3), staff expense, and requests for special funding;
- Critically evaluate the academic and administrative purposes of summer expenditures (e.g. the appropriate number of teaching assistants and readers, or the legitimacy of high supplies or laboratory costs) more closely.

II. How does revenue sharing work?

Summer Sessions collects revenue, subtracts expenses, and distributes any remaining revenue to departments. The process, methodology, and terminology used in revenue sharing are described below.

III. What is considered revenue?

Course Revenue

- Defined as the amount generated by a department's total course fees, unit fee x number of units x enrollment.
- The unit fee includes UC and non UC fee levels.
- A snapshot of enrollment as of the end of the fourth week of each session is used to calculate the revenue for a course. Although the campus "census" of summer enrollments for UCOP reporting is done at the end of the third week of each session, we use the end of the fourth week for revenue calculation because students often drop and add after the census, and we want to make sure that we have the most accurate snapshot of enrollments for which revenue has been received.

Return to Aid

About a third of the course fees paid by UC students is returned to the Financial Aid Office and distributed as need-based financial aid. That amount is deducted from each department's "course revenue."

Fee Differential

The difference between 2009 and 2010 per-unit fees paid by UC students is deducted every year and returned to the Chancellor's Office.

Net Revenue = Course revenue, minus return to aid and fee differential

IV. What are the expenses?

Expenses

The expenses that are attributed to a department are composed of direct instructional expenses, and indirect expenses collectively called “overhead”.

a. Instructional Expenses

- The total cost of salaries, benefits and other compensation for all instructional personnel including faculty, teaching assistants, graders, laboratory assistants, etc. It also includes the total cost of supplies, equipment, photocopying, and other directly traceable course-related expenses.
- Each academic department has its own Summer Sessions expense account number to which these expenses should be attributed. Instructional expense is the total of all charges hitting the ledger on that department’s account.

b. Overhead

Overhead is composed of expenses that cannot accurately, or should not, be attributed directly to a given department. Overhead includes the general cost of doing business that all departments benefit from, such as marketing and the cost of Summer Sessions’ staff. It also includes particular expenses that a given department may not benefit from directly, but that are an important part of a world-class summer program. These include payments to assist disabled students; state-mandated waivers for veteran’s dependents; additional hours for the libraries; and recreational services for students. Overhead expense is offset in part by registration fees that are charged on a per-student basis.

Overhead Assessment

- Each department is assigned a pro-rated portion of general university overheads.
- As with all other institutional overhead charges, everyone contributes to the benefit of the larger whole, even if a charge is not directly related to a program. In other words, a department or program may have to pay a portion of the charge for a service their students may not even use, in order to support the whole program. For example, a department would not be exempt from paying a portion of the cost for library or computing facilities, even if the department can demonstrate that their students do not use those services.
- The amount that must be pro-rated to departments is lowered by that portion covered by the “registration fee” charged to non-UC students on a per-student basis. Other fees are charged directly to students and are not part of overhead: the Instructional Enhancement Fee; course materials fees; and the fees for various bond issues or seismic renovation (e.g. Wooden Center Bond, Ackerman Seismic Renovation, etc.).
- A department’s share of the overhead will be the percentage its student credit hours (SCH) represent of the campus total. For example, if a department generated 1,800 SCH in a summer when total SCH was 76,000, the department would be responsible for 2% ($1,800 / 76,000$) of assessed overhead charges.
- The campus overhead assessment was approximately \$30 per SCH. Some overhead expenses are fixed costs unaffected by student headcount or SCH production, while others are tied to utilization and/or the dollar amount of financial transactions.
- Thus, “total expenses” would be instructional expense (#4 above) plus overhead assessment.

Campus Overhead Overview

The following is a list of campus offices, systems and activities that receive payment for services rendered during summer. Some of the components are those supported by “registration fees” during the academic year, but receive no other funding for summer. The practice of providing funding from Summer Sessions to keep the campus “alive” in summer has been in effect for many years.

Some of the fees are calculated on a “per student” basis determined by the number of students utilizing a particular service. Other overhead fees are based on fixed negotiated amounts in order to make the service or facility available to any and all summer students who wish to use the service. Still others are based on the number or dollar amount of transactions processed.

Overhead Components

- Academic Advancement Program Tutorials
- Administrative Information Systems
- Campus Computing Labs
- Center for Community Learning
- CLICC Lab
- College Tutorials
- Course and Program Marketing
- Credit Card Billing Fees
- Cultural and Recreational Affairs
- Facilities and Maintenance
- Freshman Summer Program
- Office for Students with Disabilities
- Office of Financial Aid Staffing
- OID Audiovisual Services and Instructional Media
- Systems Programming and Website Development/Maintenance
- Registrars’ Office Systems
- Student Accounting Staffing and Systems
- Student Retention and Readmission Program
- Summer Sessions Operating Expenses
- Summer Sessions Staffing
- Undergraduate Admissions Office staffing
- University Cashier
- University Libraries
- Veteran’s/Firemen/Police Dependents’ Fee Waivers

Overhead Expenses Paid by Academic Departments in 2011

The following table and chart identify the specific amounts and percentages of the total for the overhead expenses attributed to academic departments for 2011 activity. The distribution, as you know, is pro-rated based on student credit hour production. Also note the “fee waiver” category. They show as overhead, but they are also attributed to departments as revenue, so the net effect was actually zero. The fee waiver program for UC students taking more than 15 units in summer was eliminated in 2010.

Summer Sessions Administration	
Programming and Database Mgmt.	\$224,056
Marketing and Customer Service	\$259,850
Billing and Receivables/Student Services	\$235,460
Scheduling/Student Services	\$189,424
3% merit for 6 months	\$125,190
<u>Total Summer Administration</u>	<u>\$1,033,980</u>
College of Letters & Sciences	
DUE – College & AAP Tutorials	\$19,705
DUE – FSP/TSP	\$71,620
DUE – SRRP & Incentives	\$22,300
OID – Audiovisual Services	\$45,000
OID – Center for Community Learning	\$64,721
OID – Instructional Media	\$24,000
College Summer Staffing and Programming	\$71,058
CSI Housing Supervision and Programming	\$62,590
<u>Total College of Letters & Sciences</u>	<u>\$380,994</u>
Vice Chancellor, Student Affairs	
Cultural & Recreational Affairs	\$95,600
Disabled Students	\$64,856
Financial Aid Office	\$254,076
Registrar's Office	\$120,000
Undergraduate Admissions	\$38,731
<u>Total Vice Chancellor, Student Affairs</u>	<u>\$573,263</u>
University Library	
CLICC	\$43,694
University Library Staffing	\$173,971
<u>Total University Library</u>	<u>\$217,665</u>
Vice Chancellor, Administration	
AIS	\$110,000
Cashier	\$35,405
Credit Card Discount Fee	\$453,479
Facilities	\$114,435
Bad Debt	\$89,302
Student Accounting	\$16,216
<u>Total VC Administration</u>	<u>\$818,837</u>
Fee Waivers and Reductions	
Cal-Vet Dependents	\$404,324
Incentive and outreach waivers	\$191,317
<u>Total Fee Waivers and Reductions</u>	<u>\$563,479</u>
TOTAL OVERHEAD ATTRIBUTED TO DEPTS.	\$3,620,380

V. How are Travel Study and Summer Institutes handled?

Travel Study and Summer Institutes (Surplus/Deficit)

- All International Education Office (IEO) Travel Study programs and Summer Sessions “Summer Institutes” are grouped together as if they formed separate entities. They, in effect, are operated in a parallel financial environment because they are more centrally coordinated and expenses (e.g. transportation, facilities rental, food, lodging, etc.) are handled by either IEO or Summer Sessions.
- Once the overall financial performance of each program is determined, the resulting surplus (or, in rare instances, deficit) is added to the net balance of the sponsoring academic department’s revenue sharing spreadsheet.

The final “profit” for a Travel Study program or Summer Institute is determined after all expenses have been paid and after return to aid and campus overheads have been assessed.

VI. What if a department ends up in deficit?

Deficit Distribution

- Since the deficits of “unprofitable” departments become part of Summer Sessions’ overheads, they must be redistributed as part of the overheads borne by “profitable” departments.
- When revenue sharing was first implemented in the late 1990’s, it was not uncommon for several departments to be in deficit at the end of each summer.
- As departments came to depend more and more on summer revenue, chairs and staff became more sensitized to their revenue/expense picture and, as a result, deficits have been dramatically reduced in number and in dollar amount.

Last Year’s Deficit

- Although departments in deficit are covered in the year of their deficit, the amount of that deficit is carried forward from year to year until it is fully recovered.
- Departments that run a deficit in one year but generate a surplus in the next year will, in effect, repay their loan to the other departments. In other words, a department’s surplus will be subtracted from its accumulated surplus before distribution of any revenue takes place.

Summer Sessions Revenue Shared

- The resulting figure is the amount available to be transferred to the department’s revenue sharing account on fund 69460.

Login to see your department's [2012 Revenue Sharing report](#).

SUMMER SESSIONS MARKETING

The goal of any marketing campaign should be increasing awareness of a product. In the case of UCLA Summer Sessions, the “product” is one of unquestionable quality: the excellent programs available at UCLA. The constant goal of marketing efforts should then be an increased Summer Sessions presence on the UCLA campus, which will lead to increased awareness of programming among UCLA students, followed by UC students, local high school students, students from other U.S. and international universities, and the community at large. The desired effect of this increased awareness is increased enrollment.

Summer Sessions will effectively use electronic tools, including email blasts, targeted emails, and assiduous maintenance of the Web site with eye-catching graphics and constantly updated content. Gradually, the Office of Summer Sessions will achieve brand awareness through careful use of the upcoming logo, banner, and other graphic constants. Marketing will strive to make sure the message, both textual and graphic, remain consistent.

Part of marketing is building relationships inside and outside the UCLA community. Summer Sessions staff will meet with members of other departments, attend professional conferences, visit cultural centers, contact the press, and cultivate contacts with secondary institutions.

Objectives

Immediate-term:

- Emails to UCLA and UC students highlighting selected programs.
- Targeted email to available lists (UCLA majors, PSAT, SAT, high school teachers, etc) about each program individually.
- Attend relevant professional conferences.
- Flyer to the greatest extent possible; look into university system of posting flyers on kiosks.
- Visits to Student Affairs Officers and to classrooms where appropriate and possible.
- Constant updates and improvements to the Web site.
- Event production including information sessions on various programs.
- Inexpensive media buys, for instance bus cards

Intermediate-term:

- Relationship building within the UCLA community and without by attendance at more events.
- Further partnerships and collaborations with other departments by hosting and attending joint events.
- More targeted email campaigns to other UCs (Student Affairs Officers, for instance)
- Direct mail campaigns to other universities and community organizations
- Increased press coverage through cultivation of journalistic contacts and timely press releases

Long-term

- Strategic media buys to enhance national presence (The New Yorker, New York Times, etc)

- Public outreach, including hosting high school students on campus, providing guest lectures on college curricula for high school students, taking some programs off-campus to reach distance learners

Please keep in mind that the Summer Sessions marketing department is trying to achieve a consistent image. If your department would like to create its own materials, please allow us to help you with review and production.

Target Marketing for New Programs:

Summer Sessions may provide extra funding to first year programs for additional print materials and/or advertising if necessary.

Summer Sessions can help create these special materials that will be designed to work with the voice and the look of the marketing campaign if the Department provides the necessary information and content for the marketing pieces.

The department will grant Summer Sessions authority to edit this information and content, as well as full control of the design.

If the department requests this type of additional specialized marketing for the program after the first year, the department will be responsible for the production costs.

ACADEMIC POLICIES AND MISCELLANEOUS INFORMATION

Enrollment

Enrollment and registration are separate processes. Summer enrollment occurs first, when a student signs up for a class. The student is registered when fees are paid. Course enrollment is on a first-come, first-served basis.

- **Enrolling Up to and During the First Week of Classes:**
Students are guaranteed enrollment in any Summer Sessions course, except for limited-enrollment courses that have reached their limit, and courses that require instructor or department consent to enroll when that requirement is specifically noted.
- **Enrolling During the Second Week of Classes:**
Instructor consent is required for all enrollments beginning the second week of each session. Enrollments after the second week of each session may also require college approval in addition to instructor consent.
- **Enrollment for Revenue Sharing:**
Enrollment as of the end of the fourth week of the session determines the revenue for a specific course. Students must be enrolled by the end of the fourth week of each session to be counted. Therefore, it is even more important than ever for instructors to ensure that their rosters are accurate before the end of the fourth week of the session.

Adding and Dropping Non-Impacted Courses

- **Before the Session Begins:** No approval is required unless noted in the schedule or on our Web site.
- **After the Session Begins:** The instructor's signature or a PTE is required for each course being added beginning the second week of the session. The instructor's signature is required for each course being dropped beginning the fifth week of the session to confirm that the student did not take the final examination.

Adding and Dropping Impacted Courses

- **Before the Session Begins:** No approval is required unless noted in the schedule or on our Web site.
- **After the Session Begins:** The instructor's signature or a PTE is required for each course being added beginning the second week of the session. College approval (UCLA Summer Sessions Office approval for non-UCLA students) is required for each course being dropped beginning the second week. Students who successfully withdraw after the deadline will have a notation on their transcript.

Study List and BruinCard: Students can verify their course enrollment, class times and locations, and final grades via [MyUCLA](#). Students should see the [BruinCard](#) Web site for information about obtaining a BruinCard.

Staff Discount Information

Summer Sessions will waive the registration fee for eligible UCLA and ASUCLA staff employees. To qualify, an applicant must be either a 50% time or more career staff employee or a full time casual staff employee of UCLA or ASUCLA, and must have worked for the University for at least six months prior to the beginning of the session in which they desire to enroll. *Current UC students do not qualify for this discount.*

To apply for the discount, send an e-mail to enroll@summer.ucla.edu. The staff discount cannot be applied to special programs such as Travel Study programs.

Department Sponsorship

Departments desiring to pay a student's fees may do so by reimbursement, or by paying fees directly through BAR using an account they establish with the Financial Aid Office.

To be reimbursed, students pay their own fees, and after the session is over and satisfactory completion of the course(s) is demonstrated, the department prepares a reimbursement in the PAC system.

Fees may also be paid directly through BAR if the department has the appropriate financial aid account. For information about paying student fees through BAR, contact the Financial Aid Office for undergraduates, or Graduate Student Support for graduate students.

For more information contact [Steven Angelo](#) x64933.

LIBRARY RESERVES AND BOOK REQUESTS

College Library Reserves

[College Library Reserves](#) scans homework solution sets, class notes and permanent reserve exams to mount on the College Reserves Web site. The online images are available to all on-campus users and remotely to UCLA students, faculty and staff.

Advantages to you and your students include:

- Fewer hard copies to submit, update and maintain
- Departmental savings for photocopying
- 24 hour access to materials
- No missing or mutilated pages
- Broader options for studying

Requirements:

- Written or verbal permission to Reserve staff to scan your materials.
- For solution sets and class notes, one copy of weekly additions must be dropped at the circulation desk with a note that it is for "scanning only" and to what week it belongs.

URLs as Reserve items:

- URLs may also serve as Reserve item requests. These can be personal and/or departmental homepages as well as other online resources you would like your students to access.

For more information contact [Richard Jones](#) x64272.

Book Requests

Academic departments complete a Faculty Textbook Request Form and return it prior to the deadline date announced by the bookstore. A separate form must be completed for each class. Your department has permission to increase its supplies and expenses budget to pay special freight charges if enrollment exceeds the book order.

Library Reserve Book List

The deadline for submitting this form is listed in Guidelines for Reserved Material, available from the Library.

SUMMER SESSIONS DIRECTORY

UCLA Summer Sessions

Box 951418
Los Angeles, CA 90095-1418
Campus Mail Code: 141801
Fax: (310) 825-1528
info@summer.ucla.edu
www.summer.ucla.edu

Student Inquiries call x54101
Department Inquiries call x57512

[Hadyn Dick](#)

Interim Director, Summer Sessions
Executive Director, International Education Office
phone x50277

[Steven Angelo](#)

CFO
phone x64933

[Jisoo Kim](#)

Associate Director
phone x57370

[Tony Beck](#)

Classroom Scheduler
phone x59774

[Meri Davtyan-Beshlikyan](#)

Director, Information Systems
phone x69612

[Cathy Ruiz](#)

Accounting and Payroll Assistant
phone x50623