PPS Online Update
Policy & Procedures
Graduate Division

- Graduate Students - Academic Titles
- Non-Student Tutors/Readers
- Non-UC Visiting Graduate Students

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Graduate Division

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1. Introduction

Welcome! If you are new to hiring graduate students, please be sure to enroll in the mandatory PPS Update - Graduate Division Procedures and Activities class through the UC Learning Center at http://blink.ucsd.edu/. In addition, you may also want to subscribe to the following listservs (see contact emails on page 1-2):

Grademp: for staff handling graduate student employment. Contact Becky Burrola
Gradsup: for staff handling graduate student support (including fellowships). Contact Courtney Aguila
Visitinggradstaff: for staff handling non-UC Visiting Graduate Students. Contact Leo Alvarado

This document contains the policy and procedures for the following:

- Graduate students employed on student academic titles
- Graduate Division policy for hiring graduate students on student staff titles
- Medical student and Pharm D employment
- Non-students appointed as Tutors and Readers
- Non-UC Visiting Graduate Students

DELEGATION OF AUTHORITY

Graduate Division is the final approval authority for a graduate student employed on a student academic title or student staff title with the following conditions:

1. The appropriate Divisional Dean is the appointing authority for a graduate student appointed as an Associate In (Teaching-a-Course). The Dean of the Graduate Division must review and approve the file prior to the appointment.

2. Student Employment Office (SEO), a division of the Career Services Center, must pre-approve the employment of a graduate student on a student staff title (a casual-restricted employee). Use of these titles is under the jurisdiction of Career Services, requires the approval of the graduate department, and is subject to the final approval of the Dean.

3. The employment of graduate students as UCSD career employees is handled as follows:
   a. For current UCSD career staff employees who become graduate students, the appropriate authority is Central Human Resources and the Graduate Division.
   b. All other graduate students are under the jurisdiction of the Graduate Division, which does not allow employment into a UCSD staff position (career, limited or temporary).

The Graduate Division will review all payroll actions and contact the funding source to make necessary corrections if needed. In addition, The Graduate Division has the authority to terminate any action not in compliance with stated graduate student policy and procedure.
GRADUATE DIVISION STUDENT FINANCIAL SUPPORT UNIT

The following is a list of staff members in the Graduate Division Financial Support Unit. If you have questions about a particular area, please contact the appropriate person.

Graduate Division FAX Number:  (858) 534-4304

Kathryn Murphy, Director, ext. 43724, kjmurphy@ucsd.edu
Merit-based financial support and academic appointment policies and procedures including:
- Pre- and post-award administration
- Long-term financial support planning and analysis
- Financial support advising
- Need-based financial aid liaison
- Satisfactory academic progress appeals

GRADUATE STUDENT EMPLOYMENT

Becky Burrola, ext. 43727, rburrola@ucsd.edu
- Oversees the appointment/employment for graduate students (A-L)
- Reviews Non-student Tutor/Reader exception letters and employment
- Reviews Academic Year Associate-In (Teaching a Course) appointments
- GSRTF Payments - GSR Tuition and Fee Remission
- General tax information for graduate students
- Job Opportunities booklet

Courtney Aguila, ext. 46562, claguila@ucsd.edu
- Oversees the appointment/employment for graduate students (M-Z)
- Oversees the Defined Contribution Plan exemption process for graduate students
- Reviews exception letters for over 50% employment
- Reviews Summer Associate-In (Teaching a Course) appointments
- TAHI/TAFE Payments - TA health insurance payments/TA partial fee remission
- TA Fee Deferment and TA Loan Programs

Leo Alvarado, ext. 25332, l4alvarado@ucsd.edu
- Visiting Graduates – Policy Questions and Appointment Forms
- Foreign and outside agency (third-party) billing

Visiting Graduate appointments: vgcoordinator@ucsd.edu
Sponsored billing: grad3rdparty@ucsd.edu
BLOCK GRANT & GRADUATE FELLOWSHIP (MERIT-BASED SUPPORT)

Tanya Reese, ext. 40720, treese@ucsd.edu

Departments
Audiology
Biological Sciences
Biomedical Sciences
Chemistry/Biochemistry
Clinical Psychology (SDSU Joint Doctoral)
Computational Science, Mathematics, & Engineering
Mathematics
Mathematics & Science Education (SDSU Joint Doc)
Neurosciences
Physics
Political Science
Public Health/Epidemiology (SDSU Joint Doctoral)
Scripps Institution of Oceanography

Post-Award Administration
Interdisciplinary Collaboratories
President's Dissertation Year Fellowship
San Diego Fellowship – Competitive (Backup)
San Diego Fellowship – Matching (Backup)
NSF Graduate Research Fellowship Program (Backup)
Cota-Robles Fellowship – Competitive (Backup)

Ha Truong, ext. 46464, hatruong@ucsd.edu

Departments
Bioengineering
Bioinformatics
Chemical Engineering
Computer Science & Engineering
Economics
Electrical & Computer Engineering
International Relations and Pacific Studies
Master of Advanced Studies
Materials Science
Mechanical & Aerospace Engineering
NanoEngineering
Rady School of Management (RSM)
Structural Engineering

Post-Award Administration
Alliance for Graduate Education (AGEP)
Cota-Robles Fellowship - Competitive
Dean of Social Sciences Fellowship
Howard Hughes Medical Institute
Humanities Fellowship
NSF Graduate Research Fellowship Program
San Diego Fellowship - Matching
San Diego Fellowship - Competitive
Special Fee Scholarships (Stacey, Davis, Noyes)

Suzanne Young, ext. 22596, smy017@ucsd.edu

Departments
Anthropology
Cognitive Science
Communications
Education Studies
Ethnic Studies
History
Lang. & Comm. Disorders (LCD)
Latin American Studies
Linguistics
Literature - MFA & PhD
Music
Philosophy
Psychology
Science Studies
Sociology
Theatre & Dance
Visual Arts - MFA & PhD

Post-Award Administration
Leave of Absence/Withdrawals
Off-Campus Study (In-Absentia) Waiver (OOSW)
2. Pre-Approval Process

STUDENT'S ACADEMIC GRADUATE DEPARTMENT/GROUP (HOME DEPARTMENT)

For all graduate students, the students’ academic graduate department/group (the department/group where the student is pursuing a degree) will be established as the HOME DEPARTMENT.


The graduate department/group is responsible for pre-approving all support (academic and staff titles). In addition, it is the department’s responsibility to verify the student’s support eligibility, to coordinate the student’s support from all sources, and to coordinate with The Graduate Division the issuance of TA and GSR payments using the Online Financial Support Tool (https://goapp.ucsd.edu/financial/).

Each of the academic graduate department/groups has the authority to establish its own pre-approval process for students appointed/employed outside the graduate department/group. This includes determining who in the department can approve the appointment/employment and deciding whether the approval can be verbal or must be in writing.

NOTE: If a student changes from one department to another, The Graduate Division will be responsible for making the change to the Home Department code in the Payroll system. You can also contact The Graduate Division to change the Home Department code for new graduate students who were previously set up in the Payroll system as undergraduate or non-student employees.
INSTRUCTIONS FOR FUND SOURCES WHEN STUDENT IS FUNDED OUTSIDE OF THE GRADUATE ACADEMIC DEPARTMENT

1. Determine the graduate student’s academic department/group. You can ask the student or look in the Graduate Division’s Student database at https://ga.ucsd.edu/student_db/. For those who use ISIS, you can do a name search on GP NAME and then check for the Graduate Dept/Group listed in the RG ENRLINQ screen.

2. Contact the graduate coordinator in the student’s graduate academic department/group (by using the Home Dept Code List) to:
   a. Obtain pre-approval of funding.
   b. Determine whether it’s a new hire, rehire, or continuation of funding.
   c. All GSRs in the same academic department/program are appointed to the GSR step level(s) as established by the student’s academic department or program (not the fund source).

3. New Hire
   a. For a new hire, input the student’s graduate academic department as the Home department (EPER screen).
   b. Then add your department as the Appointment Department code (EAPC screen).

4. Rehire
   a. If you don’t have access to the student’s record (your department does not currently exist as a department appointment code), ask the student’s graduate coordinator to add you as an alternate department on the EPER screen.

5. PPS PAN (Personnel Action Notice) Routing
   a. PANS for graduate students are automatically routed to:
      i. Home Department (graduate academic department)
      ii. Appointment Department (fund source department)
      iii. Personnel (The Graduate Division)
      iv. Payroll (retroactive actions)
      v. Alternate Department

Note: Users may also input themselves or another reviewer as a user-defined reviewer.
3. Graduate Student Employment Eligibility Rules

FISCAL YEAR APPOINTMENTS
Graduate students employed on student academic titles may be appointed for a maximum of one fiscal year (7/1-6/30) at a time. During the month of May of each year, the funding source may extend the appointment for the following summer, quarter(s) or fiscal year if the student meets all of the eligibility criteria.

ENROLLMENT AND REGISTRATION (ENROLLMENT PLUS TUITION/FEES PAID)
Graduate students must be registered full-time (a minimum of 12 units) to be employed above 25% time during the academic year. Students registered in less than 12 units are eligible for 25% time appointments upon department approval.

PERCENT TIME AND ACADEMIC DEPARTMENT SUPPORT POLICY
UC graduate student employment policy states that a full-time graduate student may be employed a maximum of 50% time (20 hours per week) and up to 100% time (40 hours per week) during the summer months. The summer is defined as the day after the Spring quarter ends and the day before the Fall quarter begins.

Each graduate academic department at UCSD has established its own support policy for all graduate students registered in the department. This includes the establishment of a GSR step level(s) and appointment percentage of time allowed during the academic year and summer. A funding source must contact the student’s academic department to obtain pre-approval of employment and to adhere to the individual department’s support policy.

BASIC GRADUATE STUDENT QUALIFICATIONS FOR EMPLOYMENT ELIGIBILITY
1. Be in good academic standing:
   a. Meet department standards including a satisfactory spring evaluation.
   b. Maintain a GPA of 3.0 in upper-division and graduate course work, and not have more than eight units of F and/or U grades overall.

(Please note that academic warning and/or dismissal letters are issued by the Graduate Division Academic Affairs Unit and available to the student and graduate department in the Online Student Database at http://grad.ucsd.edu/resources/staff.html. The Dean of the Graduate Division usually allows the student one or two quarters to be removed from academic probation while at the same time retain eligibility for campus appointment).
2. Be within the time limits for graduate student support (employment, fellowship, etc.).
You may view a complete time limit report via the following Graduate Division webpage: https://ga.ucsd.edu/student_db/time_limits_report

   a. Ph.D./D.M.A. degree aim: Every doctoral student has two time limits and a
      TA/Associate limit affecting employment/support eligibility: The pre-candidacy
      time limit (PCTL), the support time limit (SUTL), and the 18 quarter limit. The
      “expiration date” is defined as the last day of the quarter.

      **PCTL:** A student must advance to candidacy prior to the expiration of the pre-
      candidacy time limit. If a student does not meet this requirement, the Graduate
      Division Academic Affairs Unit puts a “hold” on the student’s record preventing
      further enrollment and registration. When a PCTL expires and the student has not
      advanced to doctoral candidacy, the student is not eligible for employment
      beyond the quarter break following the PCTL expiration date.

      **SUTL:** The support time limit identifies the quarter through which a graduate
      student may receive any payment from university funds (on-campus employment,
      fellowship, etc.). When a SUTL expires, the student is not eligible for
      employment beyond the quarter break following the SUTL expiration date.

      **18 Quarter Limit:** No one student may be employed as a teaching assistant
      and/or associate (teaching a course) for more than 18 quarters. Please note that
      this is a separate and distinct limit, and any extension granted to SUTLs does not
      apply to the 18 quarter TA/Associate (teaching a course) limit.

   b. M.A., M.Eng., and M.S. degree aim: Eligible for 7 quarters of employment or
      other support.

   c. M.F.A. and M.P.I.A. degree aim: Eligible for 10 quarters of employment or other
      support.

3. International graduate students who are non-native speakers of English must be certified
   as having requisite language skills before they can serve as teaching assistants. This
   English language policy does not apply to a student who serves as a TA which is
   conducted in his/her native language. For further information, contact the International
   English Language Program, (858) 534-3981, https://commons.ucsd.edu/educators/ELP-
   ii/index.html
SPRING EVALUATIONS

Graduate Council policy requires that doctoral and MFA students be evaluated every spring. A satisfactory evaluation on file in the Graduate Division is necessary for future support. The following students are exempt from an annual spring evaluation:

1. A student advancing to doctoral or M.F.A. candidacy during winter or spring.
2. A student on an approved leave of absence during spring. (A student on leave during the spring quarter must have an evaluation completed no later than the end of the first quarter of return).

The Graduate Division Dean strongly urges faculty to complete evaluations by the end of the spring quarter so that student registration for the future is not jeopardized. The Graduate Council advises that any requests for exceptions to policy for time limits or support will not be approved unless a current evaluation is on file.

PH.D. OR OTHER TERMINAL DEGREE - SUMMER AND QUARTER-BREAK EMPLOYMENT

A US Citizen or Permanent Resident who receives a terminal degree, and is eligible for support, can be employed through the quarter-break after graduation provided the student continues to be actively engaged in graduate student research. The summer is considered to be the quarter-break after spring quarter.

An international student (F-1 or J-1 visa) can only be employed as a student employee through the date of program completion. Program completion is the last day of the quarter in which the student is registered AND defends their dissertation/thesis (if Ph.D. student) or takes a comprehensive exam (if Master’s student). If the student does not register for units, a filing fee is required, and the program completion date will be the actual dissertation/thesis defense date (if Ph.D. student) or date of comprehensive exam (if Master’s student). Contact the International Center for additional information.

NEW ADMIT - INCOMING/ENTERING GRADUATE STUDENT

A graduate student who has been officially admitted to graduate study (Graduate Division has issued the Certificate of Admission) may be employed as a GSR during the summer (summer being defined as the first day after spring quarter ends) or quarter-break before the first quarter of registration. For example, a fall quarter admit may be employed during the summer, before their first quarter of enrollment, as a GSR.

Note: International Center guidelines state that in general, an international student in F-1 or J-1 status cannot enter the U.S. more than 30 days prior to the program start date listed on the I-20 or DS-2019.
STUDENT ON A LEAVE OF ABSENCE
A graduate student on an academic Leave of Absence may not receive any payment from the university (employment, fellowship, etc.) during the quarter(s) while on Leave and must be separated from PPS.

GRADUATE STUDENT WHO IS READMITTED OR RETURNING FROM A LEAVE OF ABSENCE
A graduate student who has been readmitted or is returning from a Leave of Absence, and within the support time limit, is eligible for employment during the summer or quarter break preceding the quarter of readmission or return from a leave of absence.
4. Exceptions to Policy

Departments should be aware of the following exceptions to policy and/or use of titles:
- Academic year appointment(s) greater than 50% time
- Graduate Student Researcher (GSR) not meeting eligibility requirements
- GSRTF on extramural funds not automatically accepting T/F remission charge
- Teaching Assistant (TA) for less than the entire quarter or mid-quarter change in percent time
- Non-degree students on academic titles (ex. EAP Program)
- Titles:
  - Associate-in-Lieu in other than approved programs
  - Tutor in other than an approved program

ACADEMIC YEAR APPOINTMENTS GREATER THAN 50% TIME

U.S. Citizens and Permanent Residents:
The employment of a graduate student over 50% time during the academic year requires the prior written approval by:
1. All funding sources involved
2. The student’s graduate academic (Home) Department Chair
3. The Dean of the Graduate Division

Additionally, the endorsement of the student’s academic advisor is required. A separate letter should be submitted for each student. Do not combine the names of several students in one letter. The exception request is usually initiated by the funding source requesting the exception.

In general, a request for exception up to a maximum of 75% time will be considered.

Note: The Dean will not approve a GSR position over 49.99%, although he/she may approve a 49.99% GSR in combination with another 25% title such as TA or Reader.

WARNING: Students appointed over 50% may be eligible for core benefits as outlined in Chapter 21.

International Students (F-1 and J-1 status):
An international student in F-1 or J-1 status is restricted to on-campus employment of a maximum of 50% time (20 hours per week) during the academic year. During the summer, 100% employment is allowed (depending on the student’s academic department support policy) if the student intends to enroll full-time Fall quarter and meets all other eligibility criteria.

No exceptions are permitted to this rule. Contact the International Center with questions.
Exception Letter Guidelines:

1. The request must state that the student is a U.S. citizen or permanent resident.
2. The Dean’s criteria for considering an exception should be addressed in the letter. These are:
   a. That the student is truly outstanding (must have a minimum 3.0 GPA) and that the additional appointment will not detract from the student making good academic progress.
   b. The student must be in good academic standing and there must be a current departmental spring evaluation on file with the Graduate Division indicating that the student is making excellent progress. If the spring evaluation indicates any deficiencies, these should be addressed by the student’s academic department/group in the exception letter.
   c. That the additional position is not taking away support from another student without full support.
3. The letter must be approved by the student’s academic Department Chair, the student’s academic advisor, and all funding sources.

NON-DEGREE STUDENTS ON ACADEMIC TITLES

The appointment of a non-degree graduate student (a student admitted to Non-Degree status) on an academic title requires prior written approval by the student’s graduate department/group Chair and the Dean of the Graduate Division. Exceptions will be considered if all degree students in the department are fully supported and that the non-degree student is not taking away support from a degree student (a student admitted for a Master’s or doctoral degree).

GRADUATE STUDENT RESEARCHER EXCEPTIONS

GSR Not Meeting Eligibility Criteria

It is an exception to appoint a Graduate Student Researcher on Tuition/Fee Remission who does not meet all of the five criteria for appointment (refer to Chapter 8, Guide for Graduate Student Researchers, page 8-2). A request for exception must receive pre-approval from the Dean of the Graduate Division.

GSRTF on 99100A or Other Funds Not Automatically Accepting T/F Remission Charge:

- There are some 99100A funds do not allow GSRTF such as American Cancer, American Heart, and March of Dimes; therefore, all GSRTF charges on a general fund (99100A) go through a clearing account managed by Kathryn Murphy (Director, Graduate Student Financial Support, kjmurphy@ucsd.edu, (858) 534-3724).
- Prior to hiring a GSR on a 99100A fund, the hiring department must submit a “GSRTF Clearing Account or Recharge Action Form”.
- The form is available on the Graduate Division Financial Support website at: http://grad.ucsd.edu/_files/financial/GSRTF%20Recharge%20Form.pdf
TEACHING ASSISTANT EXCEPTIONS

Appointments Less Than Entire Quarter and Change in Percent Time
It is an exception to appoint a Teaching Assistant for less than the entire quarter or to increase the percent time mid-quarter. The action requires pre-approval by staff in the Graduate Division Financial Support Unit (FSU). The FSU staff will determine if the situation also requires a formal exception letter and consideration by the Dean of the Graduate Division. The action also requires special coordination with the Payroll Office since paychecks are not automatically generated.

TAs have a pay period in the Payroll system (three full months) but a service period of the actual quarter dates. If a student does not work the entire quarter (begins late or ends early) or changes the percent time mid-quarter, the action requires that you calculate the TA daily rate of pay with FSU staff assistance. Chapter 10, Guide for Teaching Assistants, provides information for computing the TA daily rate of pay (page 10-3).

Also, be aware that if the student does not work the equivalent of 50% time for half of the quarter, he will become ineligible for the TAHI/TAFE payments and will be billed by the University. This is another reason why you must contact FSU staff prior to inputting the action into the Payroll system.

USE OF TUTOR TITLE IN OTHER THAN APPROVED PROGRAMS
Only programs that have received prior approval by the Graduate Division may use the Tutor title code.

USE OF ASSOCIATE (IN-LIEU-OF TEACHING ASSISTANT) TITLE IN OTHER THAN APPROVED PROGRAMS
The Associate (in-lieu-of TA) title has been approved for specific programs including:
- Teaching + Learning Commons, Center for Engaged Teaching
- The Division of Biological Sciences
- Department of Psychology

Any other departmental usage requires the approval of the Dean of the Graduate Division.
5. New Hire Guidelines

HOME DEPARTMENT PREAPPROVAL

1. If a graduate student has never been hired by the university, the home department or funding department will need to process a “New Hire”.
2. If the student is being hired by a funding source outside the home department, refer to instructions in Chapter 2. The Home Department Contact List is available at: http://grad.ucsd.edu/_files/financial/employment/home_dept_code.pdf
3. Refer to the instructions in the PPS desk Reference Manual for setting up the student’s appointment/employment using the “HIRE” bundle.

IMPORTANT: On the EPER screen, you must input the student’s academic graduate dept/group as the “Home Department”.

SSN

On the EEID screen, enter the nine-digit Social Security number without hyphens, for example, 123456789.

Information Regarding Social Security Numbers for International Students:

International students must obtain a social security number to be employed. You may enter the appointment in PPS when the student has provided either of the following document(s): 1) a receipt that they applied for an SSN or 2) a copy of the Social Security card/number. If you have a receipt of that the student has applied for a SSN, but has not yet received it, input nine 9’s (i.e. 999999999) on the EEID screen in the PPS system or nine zeros in the new web based PPS.

After pressing enter, the “Browse Select” screen appears. Type “S” (for Select) beside “None Below – Assign New ID ” and press enter. Press F3 to continue to the next screen. After updating the EEID screen, the SSN number will appear as zeros.

Follow up to ensure that the student brings you a copy of his permanent social security card after he receives it. You must then enter the permanent number on the EEID screen.

In addition, you must complete the Social Security Change Form on the following page, or at http://grad.ucsd.edu/_files/financial/ssn_change_form.pdf. The completed form should be sent to the Graduate Division, Mail Code 0003. The Graduate Division will update the SSN in ISIS and SAM computer systems to match the PPS database. If the numbers do not match, the student’s name will appear on the Student FICA error report. If the student has not yet applied for a number, give the student a copy of the social security number information sheet located at the end of this chapter. **You may not input a payroll action unless the student already has a social security number or has a receipt from the Social Security Administration showing that he/she has applied for one.**
SOCIAL SECURITY NUMBER CHANGE FOR GRADUATE INTERNATIONAL STUDENTS
(Students who switch from a “990-” number to a permanent number)

Please complete this form and send to:

Kathryn Murphy, The Graduate Division, 0003

NOTE: If the student is also in the PPS system, enter the new number on the EEID screen and send a copy of the SSN to Payroll, 0952.

Student Name: __________________________________________________________

A# (Student ID Number): __________________________________________________

SSN: ___________________________________________________________________

Preparer’s Name: _________________________________________________________

Department: _____________________________________________________________

Phone Extension: _________________________________________________________

Date: __________________________________________________________________

NOTE: The social security number must be the same in ISIS, SAM, and PPS.
NAME

On the EEID screen enter the student’s legal name as it is listed on the Social Security Card or other documentation (birth certificate, passport, etc.). The student’s name should be the same in Payroll as it is in the Student Information System (ISIS).

Note: Students may need to change their name in ISIS to match their name in PPS.

OATH SIGNATURE DATE

Complete the oath information for citizens, leaving the field blank for Permanent residents and International students. The oath must be signed on or before the first day of service. Contact the Graduate Division for damage payment procedures (PPM 395-2, Damage Payments for Services Performed Before Loyalty Oath is Signed).

For Graduate Student Researchers, Readers, Tutors and Associates (in lieu of TA), this date will be the same as the appointment/distribution begin date.

For Teaching Assistants and Associates (teaching a course) the oath must be signed on or before the service period date, which is the quarter begin date. Note: for Winter quarter, the system requires that you input 1/1 or earlier date; however, Payroll is aware the oath can be signed on or before the winter quarter begin date which may be later than 1/1).

The oath is valid for 365 days. If an employee separates and is re-hired less than 365 days from their previous hire date, the employee is not required to complete a new form.

I-9 DATE

Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer. Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee’s first day of employment.

BELI CODE

The BELI code is always “5” for graduate students on academic or casual-restricted student titles. No BELI form needs to be completed.

COLLEGE CODE

The college code is always “00” for graduate students. The college code is important for DCP purposes. If students are not identified as currently enrolled graduate students with college code 00, they will have an 8.95% deduction from their paychecks. For more information on DCP, see chapter 22 of this manual.
EMPLOYEE RELATIONS CODE

Effective June 2015, please be sure to update the Employee Relations Code (ERC) to “E” on the EPER screen when adding graduate student appointments in PPS. The “E” code will allow the system to update the appropriate Employee Unit Code (EUC) and Representation Code based on the title code for each appointment. This means that the ERC code only needs to be entered as “E” once for each student in PPS. Note that the “E” code replaces both the “H” code previously used for ASE appointments and the “I” code previously used for GSR appointments.

CREATING NEW APPOINTMENTS: CHANGE IN PERCENT TIME, TITLE CODE, ANNUAL RATES

The Graduate Division requires that the appointment percent time match the distribution percent time. You must create a new appointment whenever changing percent time. For example, a TA appointed fall at 50%, winter at 33% and spring at 25% should be set up with three appointments and distributions. Creating a new appointment is also required when the title code changes (ex: from title code 3284 to 3266 in summer), or annual rates change (due to step increase or other reasons). These actions all require newly created appointments. If you are not sure if a new appointment is needed, please call the Graduate Division FSU for assistance.
REQUARED DOCUMENTS FOR NEW HIRES

The following is a list of required documents for graduate students. These forms can be found on the Payroll website at: http://blink.ucsd.edu/sponsor/BFS/divisions/payroll/forms.html. All documents listed below except the UCRS Form 419 should be forwarded to the Payroll Office. UCRS Form 419 should be sent directly to UCOP: UC HR/Benefits, Records Management, P.O. Box 24570, Oakland, CA 94623-1570.

1. US Citizens
   a. Oath & Patent Agreement (Students with a patent question should contact the Technology Office at 534-5815)
   b. I-9
   c. W-4
   d. Wage Disposition or ADP Aline Paycard, or the student may enroll in direct deposit via At Your Service: https://atyourserviceonline.ucop.edu/ayso/
   e. UCRS Form 419 (statement concerning a position not covered by Social Security). Send form to UCOP (see address above).

2. Permanent Residents
   a. Patent Agreement
   b. I-9
   c. W-4
   d. Wage Disposition or ADP Aline Paycard, or the student may enroll in direct deposit via At Your Service: https://atyourserviceonline.ucop.edu/ayso/
   e. UCRS Form 419 (statement concerning a position not covered by Social Security). Send form to UCOP (see address above).

3. International Students (F-1/J-1 Visa)
   a. Patent Agreement
   b. I-9
   c. Wage Disposition or ADP Aline Paycard, or the student may enroll in direct deposit via At Your Service: https://atyourserviceonline.ucop.edu/ayso/
   d. Must have Social Security number or attach a receipt of application.
   e. UCRS Form 419 (statement concerning a position not covered by Social Security). Send form to UCOP (see address above).

Other forms the student may need to complete if applicable include:
   • I-9 Supplement - Section 1 Preparer and/or Translator Certification
   • Out of State Tax (UPAY 830)

In addition, you will need to provide your new hires with the following:
   • Employee Demographic Data/Revised Form U5605
   • Affordable Care Act (ACA) Exchange Notice
   • On-line mandatory annual sexual violence and sexual harassment prevention training. Details can be found at: http://blink.ucsd.edu/HR/policies/sexual/
Departments hiring Academic Student Employees should review the UAW/ASE contract and procedures at:  
http://grad.ucsd.edu/degrees/academic-student-employees.html

Departments should use the new Glacier system when hiring an International Student:  
http://blink.ucsd.edu/finance/payroll/foreign/.

For instructions on how to complete the EALN screen for international students and permanent residents, please see http://blink.ucsd.edu/finance/payroll/foreign/ealn.html#1f
# GRADUATE STUDENT NEW HIRE DATA COLLECTION WORKSHEET

(For Completion of Mandatory Fields)

<table>
<thead>
<tr>
<th>(EEID)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security Number</td>
<td>____________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle</th>
<th>Last Name</th>
<th>Suffix (Jr./Sr)</th>
</tr>
</thead>
</table>

| Date of Birth: | ____________________________ | (Press enter to look for errors before proceeding to the next screen) |

<table>
<thead>
<tr>
<th>(EPD1)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sex:</td>
<td>___(M or F)</td>
</tr>
<tr>
<td>Hispanic:</td>
<td>___</td>
</tr>
<tr>
<td>American Indian or Alaska Native:</td>
<td>___</td>
</tr>
<tr>
<td>Asian:</td>
<td>___</td>
</tr>
<tr>
<td>Black/African American:</td>
<td>___</td>
</tr>
</tbody>
</table>

| Native Hawaiian or Other Pacific Islander: | ___ |
| White: | ___ |

| Primary Ethnic/Race: | ___ | (see page 5-8) |

| Disabled Status: | ___ | (see page 5-8) |

| Veteran Status Codes – Vietnam: | ______ |
| War/Campaign: | ______ |
| Oth Status: | ______ |
| Serv Medal: | ______ |
| (N or V) | (N or E = Veteran) | (see page 5-8) |

| Recently Separated Veteran Date: | ______ |

| Citizenship: | ___ |
| (C = Citizen, R = Resident Alien, N = Non-Resident Alien, A= Canada, Mexico, S. Korea, S = India) |

| Student Status: | 4 | (Grad) |
| No. of Reg. Units: | ___ | (leave blank) |

| Stu/Reg: | ___ | (leave blank) |

<table>
<thead>
<tr>
<th>(EPD2)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Oath Signature Date:</td>
<td>_______________</td>
</tr>
<tr>
<td>I9 Date:</td>
<td>_______________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(EADR)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent Address</td>
<td>(only use for P.O. Box, route number or c/o line)</td>
</tr>
<tr>
<td>Important to keep current. Line 2: (normal address line)</td>
<td>City:</td>
</tr>
<tr>
<td></td>
<td>State:</td>
</tr>
<tr>
<td></td>
<td>Zip:</td>
</tr>
<tr>
<td>Home Phone:</td>
<td>____________________________</td>
</tr>
</tbody>
</table>

| Campus Release Codes – Perm Address: | ______ |
| Home Phone: | ______ |
| Spouse Name: | ______ |
| For all of the above: Blank = No (do not release information), Y= Yes (release information) , N=No |

(EADR) continued
Employee Organization Disclosures – Perm Address: _____ Home Phone: _____ For all of the above: Blank = Yes
(release information), N= No, Y= Yes

Mail Code: _____ (This is where the paycheck and W2 form are sent if not sent electronically).

(ETAX) Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.

Federal: Marital Status: _____(M)arried _____(S)ingle Personal Allowances:_______
State: Marital Status: _____(M)arried _____(S)ingle _____(H)ead of Household
Personal Allowances:_______ Itemized Deductions:_______
Addl Fed Tax Withholding: (leave blank)_______ Addl Fed Nonres Alien Tax ________

(EALN) For non-U.S. citizens only. Refer to payroll instructions.

Country Code: ____ Visa Type: ____ Visa/Work Permit End Date: _____ US Date of Entry_______
(F1: see line 5 on I-20; J1: see line 3 of DS-2019)

(EAPC)

APPOINTMENT:

Type: ____ Basis ____ Pd Ovr ____ Begin Date ____ End Date ____ Dur: (blank) Hiring Dept Code_____
5 (Acad) 11 over 12 = GSR
09 over 09 = TA, ASSC, RDR, TUTOR

Title Code______ %Full_____ F/V____Ann/Hr Rate_______ Rt____ Sch____ Time_______ Lv_____
A=annual MO N N
H = hourly BW A = timesheet
B = by agreement

DISTRIBUTION:

Index_______ Sub__ Dist %_______ Beg Date_________ End Date_______ Step_______
0 =TA, ASSOC, GSR (for GSRs only)
2 = RDR, TUTOR

Amount___________ DOS_______ REG____

(EPER)

BELI: 5 (Grad) Effective Date: ____
Date of Hire: ____ Original Date of Hire:______
Employee Relations Code: E Employee Relations Unit: 99 = GSR
BX = ASE (Associated Student Employees
Note: System will automatically populate if “E” is ERC code.

Home Dept Code: (must be student’s academic dept code) ____ Timekeeper Code:_______
(EPER) continued

College Code: 00 (Grad)

Comments: Enter appropriate comments.
DEMOGRAPHIC DATA CODES

Primary Ethnic/Race Codes:

F White (not of Hispanic origin)
A Black/African-American (not of Hispanic origin)
2 Chinese/Chinese-American
B Japanese/Japanese-American
L Filipino/Pilipino
R Pakistani/East Indian
X Other Asian
C American Indian or Alaskan Native
E Mexican/Mexican-American/Chicano
5 Latin American/Latino
W Other Spanish/Spanish-American
Z Native Hawaiian or Other Pacific Islander
K Korean/Korean-American*
I Vietnamese/Vietnamese-American*
G European*
J Middle Eastern*
N North African*
H Two or More Races*
U Unknown

*2014 new codes

Disabled Status Codes:
Blank Not Disabled
N Not Disabled
H Disabled
D Don’t Wsh Ans*
R No Response*

Veteran Status Oth Codes:
Blank Not a Disabled Veteran
N Not a Disabled Veteran
S Disabled Veteran
O I am Not a Protected Veteran*
P Protected Vet, No Self-Identity*

Citizenship Code List:
C U.S. Citizen
R Permanent Resident or Resident for Tax Purposes
A Non-Resident Alien from Canada, India, Mexico or South Korea
N Other Non-Resident Alien
1. **Social Security Number Required for UCSD Employment**

You must have a United States Social Security number (or a receipt showing you have applied for one) to be employed at UCSD. Your employment documents cannot be processed and you will not be paid unless you have a number or an application receipt.

You must show your Social Security card or give your application receipt to the person preparing your employment documents. If you do not have a card, please see the instructions below in order to obtain one.

2. **Applying for a Social Security Card**

Obtain information on the International Center’s website:
[http://ispo.ucsd.edu/current-students/f-1-students/working-in-usa/f-1-social-security.html](http://ispo.ucsd.edu/current-students/f-1-students/working-in-usa/f-1-social-security.html)

To get bus information to get to the Social security Office, refer to the Metropolitan Transit System’s website:
[http://transit.511sd.com](http://transit.511sd.com)

Information on how to get a bus sticker is available on Blink at:
[http://blink.ucsd.edu/facilities/transportation/commuting/public.html](http://blink.ucsd.edu/facilities/transportation/commuting/public.html)

3. **Social Security Administration Offices**

There are several offices listed in the San Diego telephone directory under Social Security Administration. They are open Monday through Friday from 9:00 a.m. to 4:00 p.m. It is advisable to call to make an appointment. The general information phone number is 1-800-772-1213.

The nearest Social Security Admin Card Center is located at:

109 West Ash St (downtown)  
San Diego, CA. 92101  
(800) 772-1213

4. **Application Receipt**

After you apply for a Social Security card they will give an application receipt. You must take this receipt to the person at UCSD preparing your employment documents so that the receipt (or a copy) can be submitted to the Payroll office.

5. **Social Security Card**

Your Social Security card will be mailed to your local address within 2-5 weeks after the date you applied. After you receive it, take it to the person who prepared your employment documents so that two copies can be made. The department will input the new number into Payroll, complete a form and send a copy to the Graduate Division Office.
6. Rehire Guidelines

1. You must process a “Rehire” (using the RHIR bundle) if there is a one day break in service (Monday – Friday) or the individual has been Separated. If appropriate you may process a GSR w/out salary appointment to cover a break in service (see Chap 8) instead of processing a rehire.

2. Before processing a rehire, determine if any student information has changed since the student was last employed (i.e. name, address, academic department, tax withholding, change in bank account, etc.).

If the student was previously set up for direct deposit, and has changed his/her bank account, the student must complete a new Wage Disposition form. The completed form should be sent to the Payroll Office with a note attached stating that there is a bank/account change. Make sure to call Payroll if you are mailing the form only a few days before the payroll compute. A student may also enroll in Direct Deposit or change their account information at: [http://ucnet.universityofcalifornia.edu/](http://ucnet.universityofcalifornia.edu/)

Contact the Graduate Division to change the student’s academic department (Home Dept) if needed.

If applicable, change the name and update the address as follows:

NAME CHANGE (if applicable) – Note: The name must match the social security card.

   a. On the EEID screen, enter the EMP ID number.
   b. Type the new name in the appropriate fields:  (First, middle, last)
   c. Press “enter” to view the new name format on the first line of the “Result” field.
   d. When the new format is correct, press “F5” to update and complete the action.
      The EMP ID will not change.

ADDRESS CHANGE (if applicable)

If the student has a change of address, enter the new address on the EADR screen. The Office of the President uses this address to mail student FICA (DCP) information. In addition, for inactive employees, the Payroll Office uses this address for mailing the W-2 form, Statement of Earnings for tax purposes.

3. If you are hiring a student outside of your own department you must contact the Home Department to obtain pre-approval from the graduate coordinator. You may use the “Home Dept/Group” contact list at: [http://grad.ucsd.edu/_files/financial/employment/home_dept_code.pdf](http://grad.ucsd.edu/_files/financial/employment/home_dept_code.pdf)

4. Refer to the “Graduate Student Rehire Data Collection Worksheet” in this chapter for additional information when processing a rehire.
NOTE: When you add an appointment with a future begin date the “Employment Status” will remain “Inactive” until the appointment begins.

Example: June 15 you input employment with a July 1 begin date. The Employment Status will indicate “I” (inactive) or “S” (separated) until July 1 when the system will automatically change the code from “I” or “S” to “A” (active) status.

The “Separation Date” and “Last Day on Pay” fields located on the ESEP screen will remain populated with dates until the employee record changes from “I” or “S” to “A” (active). The automatic re-derivation of the Retirement and FICA eligibility codes (IGEN screen) will also not occur until the employee record changes from “I” or “S” to “A” (active).

Oath

Complete the oath information for U.S. citizens. The oath must be signed on or before the first day of service by U.S. citizens. Leave the field blank for permanent residents and international students.

For students appointed as a Graduate Student Researchers, Readers, Tutors or Associates (in lieu of TA), the first day of service is the same as the appointment/distribution begin date.

When using a 10/01 start date for a Teaching Assistant or Associate (teaching a course), the oath must be signed on or before the first day of the quarter. These titles have a pay period begin and end date (what you input to PPS) versus a service period dates (the quarter begin and quarter end dates).

Note: A previously signed oath is valid for 365 days. If an employee separates and is re-hired less than 365 days from their previous hire date, the employee is not required to complete a new form.

I-9 Date

Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer. Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee’s first day of employment.

BELI Code

Please review the BELI code the student was assigned at the time of separation using Employee History. If it was previously listed as “5,” continue to use “5” when rehiring and note that a BELI Form does not need to be completed. If the code had been updated to “4,” this may reflect that the student became eligible for Core benefits under the ACA benefits eligibility rules. See Chapter 21 of this manual for details regarding Affordable Care Act (ACA) Employer Shared Responsibility Requirements.
COLLEGE CODE
Enter “00” for graduate students.

STUDENT STATUS
Change the student status to “4” (graduate) if it is listed as “1” (non-student) or “3” (undergraduate).
REQUIRED DOCUMENTS FOR NEW HIRES

The following is a list of required documents for graduate students. These forms can be found on the Payroll website at: http://blink.ucsd.edu/sponsor/BFS/divisions/payroll/forms.html. All documents listed below except the UCRS Form 419 should be forwarded to the Payroll Office. UCRS Form 419 should be sent directly to UCOP: UC HR/Benefits, Records Management, P.O. Box 24570, Oakland, CA 94623-1570.

1. US Citizens
   a. Oath & Patent Agreement (Students with a patent question should contact the Technology Office at 534-5815)
   b. I-9
   c. W-4
   d. Wage Disposition or ADP Aline Paycard, or the student may enroll in direct deposit via At Your Service: https://atyourserviceonline.ucop.edu/ayso/
   e. UCRS Form 419 (statement concerning a position not covered by Social Security). Send form to UCOP (see address above).

2. Permanent Residents
   a. Patent Agreement
   b. I-9
   c. W-4
   d. Wage Disposition or ADP Aline Paycard, or the student may enroll in direct deposit via At Your Service: https://atyourserviceonline.ucop.edu/ayso/
   e. UCRS Form 419 (statement concerning a position not covered by Social Security). Send form to UCOP (see address above).

3. International Students (F-1/J-1 Visa)
   a. Patent Agreement
   b. I-9
   c. Wage Disposition or ADP Aline Paycard, or the student may enroll in direct deposit via At Your Service: https://atyourserviceonline.ucop.edu/ayso/
   d. Must have Social Security number or attach a receipt of application.
   e. UCRS Form 419 (statement concerning a position not covered by Social Security). Send form to UCOP (see address above).

Other forms the student may need to complete if applicable include:
- I-9 Supplement - Section 1 Preparer and/or Translator Certification
- Out of State Tax (UPAY 830)

In addition, you will need to provide your new hires with the following:
- Employee Demographic Data/Revised Form U5605
- Affordable Care Act (ACA) Exchange Notice
- On-line mandatory annual sexual violence and sexual harassment prevention training. Details can be found at: http://blink.ucsd.edu/HR/policies/sexual/
Departments hiring Academic Student Employees should review the UAW/ASE contract and procedures at:
http://grad.ucsd.edu/degrees/academic-student-employees.html

Departments should use the new Glacier system when hiring an International Student:
http://blink.ucsd.edu/finance/payroll/foreign/.

For instructions on how to complete the EALN screen for international students and permanent residents, please see http://blink.ucsd.edu/finance/payroll/foreign/ealn.html#f
GRADUATE STUDENT REHIRE DATA COLLECTION WORKSHEET  
(For Completion of Mandatory Fields)

(EEID) Fill in Employee ID number and press the enter key. Name and SSN will appear.

Employee ID  ________________________________
Social Security Number  ________________________________

First Name  Middle  Last Name     Suffix  
(Jr./Sr)

Date of Birth: ________________________________

(EEP) Delete data from all fields except the Separation Date and the Check Disposition, which needs to be “3”. If “Separation Date” does not appear, add previous separation date and Reason: AK to retroactively separate the student.

Last Day on Pay: ________________________________
Separation Date: ________________________________  Reason:  _______  Destination:  _______
Future Destination Code: ________________________________  Intercampus transfer:  ________________________________
Terminal Trip Bonus Time Paid: _______  Terminal Vacation Leave Paid:  ________________________________
Terminal Sick Leave Balance: ________________________________
Check Disposition:  3  

(EPD1)

Sex:  _______(M or F)
Hispanic:  _______
American Indian or Alaska Native:  _______  Asian:  _______  Black/African American:  _______
Native Hawaiian or Other Pacific Islander:  _______  White:  _______
Primary Ethnic/Race:  _______ (see page 5-8)
Disabled Status:  _______ (see page 5-8)
Veteran Status Codes – Vietnam:  _______  War/Campaign:  _______  Oth Status:  _______  Serv Medal:  _______
(N or V)  (N or E = Veteran)  (see page 5-8)
Recently Separated Veteran Date:  _______
Citizenship:  _______
(C = Citizen, R = Resident Alien, N = Non-Resident Alien)
Student Status:  4  (Grad)  No. of Reg. Units:  _______ (leave blank)
Stu/Reg:  _______ (leave blank)  

(Press Enter key to look for errors before proceeding to next screen).
(EPD2) Fill in the new Oath date and I-9 date.

Oath Signature Date: _______________ NOTE: For TAs, the oath must be signed by the first day of the quarter.

I-9 Date: _______________ NOTE: Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.

(EADR) Permanent Address Line 1: (only use for P.O. Box, route number or c/o line)

Important to keep current. Line 2: (normal address line)

City: __________________ State: ______________ Zip: ______

Home Phone: _______________ Home Phone: ______ Spouse Name: ______

For all of the above: Blank = No (do not release information), Y= Yes (release information), N= No

Employee Organization Disclosures – Perm Address: _____ Home Phone: ______

For all of the above: Blank = Yes (release information, N= No, Y = Yes

Mail Code: _______ (If the student has Surepay, ask if his bank account number has changed. If so, complete a new check disposition form).

(ETAX) Refer to payroll instructions for a non-resident alien.

Federal: Marital Status: ____ (M)arried ____ (S)ingle Personal Allowances: ______

State: Marital Status: ____ (M)arried ____ (S)ingle ____ (H)ead of Household

Personal Allowances: ______ Itemized Deductions: ______

Addl Fed Tax Withholding: (leave blank) ___________ Addl Fed Nonres Alien Tax: __________

(EALN) For non-U.S. citizens only. Refer to payroll instructions.

Country Code: ______ Visa Type: ______ Visa/Work Permit End Date: __________ US Date of Entry _______

(F1: see line 5 on I-20; J1: see line 3 of DS-2019)

(EAPC) APPOINTMENT:

Type: ______ Basis: ______ Pd Ovr ______ Begin Date: ______ End Date: ______ Dur: (blank) Hiring Dept Code: ______

Title Code: __________ %Full: ______ F/V: ______ Ann/Hr Rate: ________ Rt: ______ Sch: __ Time: __Lv: ______

DISTRIBUTION:

Index: ______ Sub: ______ Dist %: ______ Beg Date: ______ End Date: ______ Step (no decimal): ______

Amount: ______ Dos: ______
Fill in new BELI ‘effective date’ and new ‘date of hire’. Don’t change ‘original date of hire’.

**BELI** 5 (Grad)  
**Effective Date:** ____________________________

**Date of Hire:** ____________________________  **Original Date of Hire:** ____________________________

**Employee Relations Code:** E  
**Employee Relations Unit:**  
99 = GSR
BX = ASE (Associated Student Employees)

**NOTE:** System will automatically populate if “E” is ERC code

**Home Dept Code:** (must be Grad’s academic dept code)  
**Timekeeper Code:**

**College Code:** 00 (Grad)
DEMOGRAPHIC DATA CODES

Primary Ethnic/Race Codes:

F  White (not of Hispanic origin)
A  Black/African-American (not of Hispanic origin)
2  Chinese/Chinese-American
B  Japanese/Japanese-American
L  Filipino/Pilipino
R  Pakistani/East Indian
X  Other Asian
C  American Indian or Alaskan Native
E  Mexican/Mexican-American/Chicano
5  Latin American/Latino

W  Other Spanish/Spanish-American
Z  Native Hawaiian or Other Pacific Islander
K  Korean/Korean-American*
I  Vietnamese/Vietnamese-American*
G  European*
J  Middle Eastern*
N  North African*
H  Two or More Races*
U  Unknown

Disabled Status Codes:

Blank  Not Disabled
N  Not Disabled
H  Disabled
D  Don’t Wsh Ans*
R  No Response*

Veteran Status Oth Codes:

Blank  Not a Disabled Veteran
N  Not a Disabled Veteran
S  Disabled Veteran
O  I am Not a Protected Veteran*
P  Protected Vet, No Self-Identity*

Citizenship Code List:

C  U.S. Citizen
R  Permanent Resident or Resident for Tax Purposes
A  Non- Resident Alien from Canada, India, Mexico or South Korea
N  Other Non- Resident Alien

*2014 new codes
7. Separation Guidelines

You must complete the separation bundle (SEPR) when a student terminates employment with the university, typically upon graduation.

To be in compliance with the provisions of the California Labor code law, the final paycheck must be paid to the student at the site of employment on the day of separation when:

1. a student has a predetermined end date, or
2. a student has given at least 72 hours notice of intention to quit, or
3. a student is discharged.

Final payment must be made by check. Direct Deposit is not allowed under the law.

When a student gives no notice of separation, the University has 72 hours to issue the final paycheck. If the employee requests or agrees, the final paycheck may be mailed by certified mail.

Departments must update PPS two business days prior to when the check is needed to ensure that the check is available to the student.

For the student who quits with notice, the department must arrange to present the final check to the employee at the time of his/her departure.

For the employee who quits without notice, the department must arrange for the student to pick up the check at the department or prepare the check for mailing.

For more information, refer to the Web:
http://blink.ucsd.edu/finance/payroll/processes/final-wages/how-to.html

STUDENT FICA: DEFINED CONTRIBUTION PLAN (DCP)

If the student is separating from the University and will no longer be employed at UCSD (graduating or withdrawing), and the student previously had a Defined Contribution Plan (DCP) deduction, refer the student to Fidelity to update his address and to request a withdrawal, if applicable: https://netbenefits.fidelity.com or call 1-866-682-7787

W-2

Update the student’s address on the EADR screen. For inactive employees, this is where the Form W-2, Statement of Earnings will be mailed by the Payroll Office in January.
### GRADUATE STUDENT SEPARATION DATA COLLECTION WORKSHEET

(For Completion of Mandatory Fields)

#### SAMPLE

<table>
<thead>
<tr>
<th>Last Day on Pay:</th>
<th>0630XX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Separation Date:</td>
<td>0630XX</td>
</tr>
<tr>
<td>Reason:</td>
<td>AK (Other)</td>
</tr>
<tr>
<td>Destination:</td>
<td>_________</td>
</tr>
<tr>
<td>Check Disposition</td>
<td>3</td>
</tr>
</tbody>
</table>

#### (EAPC) The end date of the appointment/distribution should match the separation date.

**APPOINTMENT:**

- **Type:**
- **Basis:**
- **Pd Ovr:**
- **Begin Date:**
- **End Date:**
- **Dur:** (blank)
- **Dept Code:**
- **Title Code:**
- **%Full:**
- **F/V:**
- **Ann/Hr Rate:**
- **Rt:**
- **Sch:**
- **Time:**
- **Lv:**

**DISTRIBUTION:**

- **Index:**
- **Sub:**
- **Dist %:**
- **Beg Date:**
- **End Date:**
- **Step:**
- **Amount:**
- **Dos:**

#### (EADR) Make sure the address is current. This is where the W-2 Form and DCP information is mailed.

<table>
<thead>
<tr>
<th>Permanent Address</th>
<th>Line 1: (only use for P.O. Box, route number or c/o line)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Important to keep current, Line 2: (normal address line)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Phone:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Campus Release Codes – Perm Address:</th>
<th>Home Phone:</th>
<th>Spouse Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>For all of the above: Blank = No, do not release information, Y = Yes (release information), N = No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee Organization Disclosures – Perm Address:</th>
<th>Home Phone:</th>
</tr>
</thead>
<tbody>
<tr>
<td>For all of the above: Blank = Yes (release information), N = No, Y = Yes</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mail Code:</th>
</tr>
</thead>
</table>
8. Guide for Graduate Student Researchers

GRADUATE STUDENT RESEARCHER (GSR)
A Graduate Student Researcher is a registered graduate student who performs research under the direction of a faculty member.

GSRs may be appointed up to 49.99% during the academic months and up to 100% during the summer with the home department’s approval. Since summer dates vary from year to year, the Graduate Division will send out an annual announcement outlining the specific dates, as well as summer policies and procedures. Please subscribe to the grademp listserv in order to receive these announcements. Effective the first day of Fall Quarter, the student will need to drop back to 49.99%.

TITLE CODES
The 3266 title code is always used during the period 7/1 - 9/30 and during the academic year for students not eligible for the GSR tuition-and-fee (GSRTF) remission program.

The 3262, 3263, 3264, 3284, 3285, 3286, or 3287 title codes are used when a graduate student is eligible for the GSR tuition-and-fee remission (GSRTF) program.

A student eligible for GSRTF is appointed on the title code (GSRTF Pool) of the student’s home department/program (where the student is pursuing a degree) as follows:

3262 - CSE (Computer Science & Engineering)
3263 - MAE (Mechanical & Aerospace Engineering)/CENG/NENG
3264 - SE (Structural Engineering)
3284 - General (all other departments and programs)*
3285 - ECE (Electrical & Computer Engineering)
3286 - Physics
3287 - SIO (Scripps Institution of Oceanography)

*For the Materials Science interdisciplinary graduate program, the title code should be that of the primary department of the student's advisor.

GSR TUITION-AND-FEE REMISSION PROGRAM (GSRTF)
General Information
A Graduate Student Researcher (GSR) who meets the eligibility criteria for GSRTF (see “Eligibility”) has their mandatory tuition/fees paid as a perquisite of employment. Currently these required tuition/fees are: Nonresident Supplemental Tuition (if applicable), Tuition, Student Services Fee, University Center Fee, Recreation Facility Fee, Graduate Student Association Fee, Student Transportation Fee and Health Insurance.
The fund source that pays the GSR salary is assessed an average monthly charge for the cost of GSR tuition-and-fee remission (GSRTF). The charging of tuition-and-fee remission to federally sponsored research grants and contracts was approved for the San Diego Campus by the department of Health and Human Services on August 3, 1984.

Note: GSR’s may be eligible for childbirth and/or childcare benefits. Further details can be found at: http://grad.ucsd.edu/financial/student-parents.html.

Eligibility
A Graduate Student Researcher must satisfy all the following conditions in order to qualify for tuition-and-fee remission:

1. Be appointed for a minimum 25% time for the full quarter in which tuition and fees are paid, or the dollar equivalent (e.g., 50% for half the quarter). Note: the dollar equivalent is calculated using quarter dates.
2. Have an appointment effective with the first week of instruction in the quarter for which tuition and fees are paid.
3. Be within campus time limits for support.
4. For Non Resident Supplemental Tuition remission, be within the first year of graduate study at UCSD (unless an international student). US citizens and permanent residents should establish California residency by the start of their second year.
5. Not have a fellowship or traineeship which provides tuition and fees. See page 8-5 for details.

Appointment Dates in PPS
This is a nine-month program from October to June. The academic year is divided into three segments, with a three month period per quarter as follows:

Fall quarter period October through December (10/1 - 12/31)
Winter quarter period January through March (1/1 - 3/31)
Spring Quarter period April through June (4/1 - 6/30)

During each of the quarter periods indicated above, a student may not be appointed at the same time using the GSR title code 3266 and the GSRTF title code(s) 3262, 3263, 3264, 3284, 3285, 3286, 3287. A student is either eligible for the GSRTF program for all months during the quarter period or not eligible (title code 3266) for GSRTF during the period.

The GSRTF monthly assessment (average rate) is prorated when an eligible GSRTF is paid from more than one fund source during the same month. Refer to Chapter 8, page 7, “Split Funded.”

GSRTF Payments
Eligible GSRs’ tuition and fees are paid quarterly on an actual rate basis by the Graduate Division. The student’s home academic department is responsible for submitting GSRTF payment requests online using the Graduate Division Financial Support Tool at https://goapp.ucsd.edu/financial/.
GSRTF Pools and Average Rates

There are seven separate GSRTF pools (CSE, ECE, MAE, SE, PHYS, SIO, General) that have a corresponding GSRTF title code and average rate (see calculation below). Based on the title code entered in PPS, the corresponding rate is charged to the salary fund source on a monthly basis to collect monies for the GSRTF payments issued on the student’s behalf.

The average monthly rate for each GSRTF Pool is published by the Office of Contract and Grant Administration (OCGA) and updated on their website in August/September each year.

The average monthly rates (and GSR salary/step levels) also appear on the Student Academic Title Rates chart on the Graduate Division website:
http://grad.ucsd.edu/financial/employment/academic-pay-rates.html

Each GSRTF Pool’s annual charge is calculated by summing the projected tuition and fees to be paid by all GSRs in the specific GSRTF Pool in the upcoming year, adding any deficit or subtracting any surplus from the Pool's previous year's account, and dividing this number by the projected number of eligible GSRs in the specific Pool. Surpluses and deficits are not shared with other GSRTF Pool accounts.

All proposals which request GSR salaries should include requests for GSR Tuition-and-Fee Remission at the average rate for the projected GSR's graduate department/program. GSRTF continues to be excluded from indirect costs.

For those individual extramural funds that do not accept the GSRTF assessment (ex. American Cancer, American Heart, March of Dimes) the appropriate monthly charge (average rate) will be debited against the special GSRTF Clearing Account which the Graduate Division administers. The department must complete the GSRTF Clearing Account or Recharge Action Form (available here: http://grad.ucsd.edu/_files/financial/GSRTF%20Recharge%20Form.pdf) and submit it to the Graduate Division.

The Graduate Division has overall fiscal responsibility for managing the seven GSRTF accounts. Each year in July/August the Graduate Division works with the GSRTF Pool departments to determine and recommend monthly average rates to go into affect the following October 1.

In 1985, all Department Chairs agreed that those departments in the General Pool and using title code 3284 will have their fellowship block grant adjusted by the amount of the department's over or underpayment to the General Pool. The Graduate Division manages this process.
GSR STEP LEVELS AND DEPARTMENT SUPPORT POLICIES

Each graduate academic department/program has established a support policy for all of their graduate students and a GSR step level(s) to provide support at a certain level. **All GSRs in the same academic department/program are appointed to the GSR step level(s) as established by the student’s academic home department or program (not the fund source).**

Use of the GSR title was adopted in 1995 by UCSD (previously we used the Research Assistant title). All requests for use of GSR step level(s) are submitted by the Chair of the academic department/program to the Dean of the Graduate Division for review and approval.

The following is a list of academic department/programs with approved GSR step level(s):

<table>
<thead>
<tr>
<th>Department</th>
<th>GSR Step Level(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthropology</td>
<td>GSR 1 &amp; 4 (step 4 effective 10/1/09)</td>
</tr>
<tr>
<td>Bioengineering</td>
<td>GSR 9 (effective 9/13, previously Step 8)</td>
</tr>
<tr>
<td>Bioinformatics</td>
<td>GSR 9 (effective 9/12, previously Step 8)</td>
</tr>
<tr>
<td>Biology</td>
<td>GSR 10 (effective 7/09, previously Step 9)</td>
</tr>
<tr>
<td>Biomedical Sciences</td>
<td>GSR 10 (effective 9/11, previously Step 9)</td>
</tr>
<tr>
<td>Chemical Engineering</td>
<td>GSR 7-8 (effective 10/16, previously Step 5-6)</td>
</tr>
<tr>
<td>Chemistry and Biochemistry</td>
<td>GSR 8 (effective 10/11, previously Step 7)</td>
</tr>
<tr>
<td>Clinical Psychology</td>
<td>GSR 6</td>
</tr>
<tr>
<td>Cognitive Science</td>
<td>GSR 6 (effective 7/11, previously Step 4)</td>
</tr>
<tr>
<td>Communication</td>
<td>GSR 5 (effective 7/16, previously Step 2)</td>
</tr>
<tr>
<td>Computer Science &amp; Engineering</td>
<td>GSR 8 (effective 10/15, previously step 7)</td>
</tr>
<tr>
<td>Economics</td>
<td>GSR 4</td>
</tr>
<tr>
<td>Education Studies</td>
<td>GSR 1-2 (effective 9/14 for M.Ed. students, previously Step 1)</td>
</tr>
<tr>
<td>Education Studies</td>
<td>GSR 1-4 (effective 9/14 for Ed.D. &amp; Ph.D. students, previously Step 1)</td>
</tr>
<tr>
<td>Electrical &amp; Computer Engineering</td>
<td>GSR 7 (effective 7/08, previously Step 6)</td>
</tr>
<tr>
<td>Ethnic Studies</td>
<td>GSR 2 (effective 7/07, previously Step 1)</td>
</tr>
<tr>
<td>Global Policy and Strategy (GPS)</td>
<td>GSR 1</td>
</tr>
<tr>
<td>History</td>
<td>GSR 1</td>
</tr>
<tr>
<td>Language &amp; Communicative Disorders</td>
<td>GSR 2</td>
</tr>
<tr>
<td>Latin American Studies</td>
<td>GSR 1</td>
</tr>
<tr>
<td>Linguistics</td>
<td>GSR 5 &amp; 7 (effective 7/09, previously Step 1 &amp; 3)</td>
</tr>
<tr>
<td>Literature</td>
<td>GSR 1-4 (2)</td>
</tr>
<tr>
<td>Materials Science &amp; Engineering</td>
<td>GSR 6-7 (effective 7/16, previously Step 5-6)</td>
</tr>
<tr>
<td>Mathematics</td>
<td>GSR 5 (effective 7/06, previously Step 1)</td>
</tr>
<tr>
<td>Mathematics &amp; Science Education</td>
<td>GSR 4</td>
</tr>
<tr>
<td>Mechanical &amp; Aerospace Engineering</td>
<td>GSR 4 (effective 7/14, for Master’s students, previously Step 1)</td>
</tr>
<tr>
<td>Mechanical &amp; Aerospace Engineering</td>
<td>GSR 6-7 (effective 7/14, for Ph.D. students, previously Step 4-6)</td>
</tr>
<tr>
<td>Molecular Pathology</td>
<td>GSR 10 (effective 9/11, previously step 9)</td>
</tr>
<tr>
<td>Music</td>
<td>GSR 1</td>
</tr>
<tr>
<td>Nanoengineering</td>
<td>GSR 7-8 (effective 10/16, previously step 5-6)</td>
</tr>
<tr>
<td>Neurosciences</td>
<td>GSR 10 (effective 9/11, previously step 9)</td>
</tr>
<tr>
<td>Philosophy</td>
<td>GSR 1</td>
</tr>
<tr>
<td>Physics</td>
<td>GSR 6-7 (effective 7/07, previously Step 4)</td>
</tr>
<tr>
<td>Political Science</td>
<td>GSR 6 (effective 10/16, previously Step 2-4)</td>
</tr>
<tr>
<td>Psychology</td>
<td>GSR 7 (effective 10/11, previously Step 5)</td>
</tr>
<tr>
<td>Public Health-Epidemiology</td>
<td>GSR 4</td>
</tr>
<tr>
<td>Public Health-Health Behavior</td>
<td>GSR 4</td>
</tr>
<tr>
<td>Rady School of Management, Ph.D.</td>
<td>GSR 4-6</td>
</tr>
<tr>
<td>Scripps Institution of Oceanography</td>
<td>GSR 10 (effective 9/14, previously Step 8)</td>
</tr>
<tr>
<td>Sociology</td>
<td>GSR 2 (effective 7/08, previously Step 1)</td>
</tr>
<tr>
<td>Structural Engineering</td>
<td>GSR 5-7 (effective 10/15, previously Step 4-6)</td>
</tr>
<tr>
<td>Theatre &amp; Dance</td>
<td>GSR 1 &amp; 4</td>
</tr>
<tr>
<td>Visual Arts</td>
<td>GSR 1</td>
</tr>
</tbody>
</table>
GSR APPOINTMENTS NOT ELIGIBLE FOR GSR TUITION-AND-FEE REMISSION

There are some situations when a Graduate Student Researcher, even though appointed at 25% or more during a quarter, is not eligible to be on the GSR Tuition-and-Fee Remission program.

1. A student has a fellowship or traineeship that pays full tuition/fees (and a monthly stipend) and the fellowship or traineeship is the primary award.

   If a student receives a fellowship with a monthly stipend and full tuition/fee payment, and the total stipend amount for the quarter exceeds the monthly GSR salary for the quarter, the GSR would not be eligible for GSRTF. The GSR would be appointed on title code 3266 (salary only).

   In the “comments” section of the payroll action, the department must provide an explanation why the student is not eligible for GSRTF (ex. “Student not eligible for GSRTF – Fellowship pays full tuition/fees and is the primary award”).

2. A student’s tuition/fees are already paid by an outside (non-block grant) fund source.

   For example, an international student has his tuition/fees paid by his home government. His GSR appointment would be on title code 3266 (salary only). A copy of the outside award must be on file in the Graduate Division. The payroll action comments section must include an explanation why the student is not eligible for GSRTF such as: “Student not eligible for GSRTF – Canada Council Award pays full tuition/fees”.

3. A student in one of the Joint Doctoral Programs between UCSD/SDSU pays registration tuition/fees at San Diego State University.

   For example, a student is in the Clinical Psychology Joint Doctoral program and is paying tuition/fees at SDSU. A GSR appointment will be on title code 3266 (salary only). The payroll action comments should state: “Clinical Psychology Joint Doctoral Program. Not eligible for GSRTF. Tuition/Fees paid at SDSU”.

   Note: If a student in a joint doctoral program is paying tuition/fees at UCSD, and meets the GSRTF eligibility criteria, then the student must be employed as a GSR on the tuition-and-fee remission program (GSRTF).

   The following Joint Doctoral Programs employ GSRs meeting the criteria listed in #3: Clinical Psychology, Mathematics and Science Education, and Public Health.

GRADUATE STUDENT RESEARCHER (GSR) WITHOUT SALARY

During the summer and academic year, there are continuing graduate students who are engaged in research and studies towards their degrees but they do not have any salaried appointments as Graduate Student Researchers (GSRs). To accommodate this situation, Graduate Division
allows the graduate academic department (Home Dept in the Payroll system) to appoint
continuing graduate students in their department as "Graduate Student Researchers without
Salary." New hires and students on leave of absence may not be appointed as a GSR without
salary.

A funding source outside of the student's graduate academic department will not be able to make
use of this title since it is the responsibility of the student's academic department/group to
monitor students' progress, verify ongoing research activities, coordinate all Payroll actions and
to separate a student who is taking leave of absence, graduating or not continuing in the program.

If your dept has not previously made use of this title, you should discuss this option with the
appropriate staff and faculty in the department. Most departments (Home Depts) have already
established an index that is used for faculty appointments without salary (PPS Code = "WOS"
and fund number = "00000A") which may be used for GSRs without salary. However, your
department may choose to establish a new index for these appointments.

**Payroll Entries for Graduate Student Researcher (Without Salary):**

**Appointment Line:**
- Type: 5
- Basis: 11
- Pd Ovr: 12
- Appt Begin: (ex. 07/01/xx)
- Appt End: (ex. 09/30/xx)
- Dept: Academic (Home) Dept Code
- Title Code: 3266
- % Full: 0.00 or Leave Blank
- F/V: Leave Blank
- Annual: Leave Blank
- Rt: Leave Blank
- Sch: Leave Blank
- Time: N (No time sheet)
- Lv: N (No leave accrual)

**Distribution Line:**
- Index: Index with 00000A fund number
- Sub: 0
- Dist %: 0.0000 or Leave Blank
- Pay Begin: (ex. 07/01/xx)
- Pay End: (ex. 09/30/xx)
- Rate Amt: 0.00 or Leave Blank
- Step: Leave Blank
- DOS Code: WOS (without salary)

**Comments:** GSR WOS (and provide dates; ex. 7/1 - 9/30)
FORMULAS FOR GSRTF ASSESSMENT

PRORATED MONTHLY ASSESSMENT
The GSRTF monthly assessment is prorated when a GSR's total pay for a month is less than 25% time.

1. (a) \[
\text{Amount paid during a month} = \frac{\% \text{ of total month worked}}{100\% \text{ Monthly Rate}}
\]
(b) \[\text{(% of total month worked) } \times 4 \times (\text{GSRTF Monthly Assessment}) = \text{Prorated Mo. Assessment}\]

Another way to calculate this is as follows:

2. (a) \[\text{(Partial Month Factor) } \times (\% \text{ Employed}) = \% \text{ of total month worked}\]
(b) \[\text{(% of total mo. worked) } \times 4 \times (\text{GSRTF Monthly Assessment}) = \text{Prorated Monthly Assessment}\]

SPLIT FUNDED GSRTF
The GSRTF monthly assessment is prorated when an eligible GSR is paid from more than one fund source during the same month. If the GSR is split funded, the system will calculate the monthly assessment for each fund source as follows:

1. \[\frac{100\%}{\text{Total } \% \text{ Worked}} = \text{Factor (to 4 decimal places)}\]
2. \[\text{Factor} \times (\% \text{ worked on one fund source}) \times (\text{GSRTF Monthly Assessment}) = \text{Split funded Monthly Assessment}\]

DETERMINING A FIXED DOLLAR AMOUNT ON SPLIT FUNDED GSRTF
Sometimes a fund source has only enough money to pay a certain amount during a particular month or quarter. You can use the following formula for these situations.

1. Determine the total sum of monthly GSR salary and GSR assessment
2. Divide the fund source A amount by #1 answer
3. Multiply #2 answer x % employed = % to employ on fund source A

Example: Fund source A can only pay $500.00.
Student is paid 48% at $2795/mo; Remission = $840

a. $1341.60 + $840 = $2181.60
b. $500 divided by $2181.60 = 22.9189
c. 22.9189 x 48% = 11.00%

Answer: Fund source A = 11% ($307.45 salary + $192.50 remission = Total $499.95)
Fund source B = 37%
SPLIT-FUNDING OF TA APPOINTMENT WITH GSR APPOINTMENT

The tuition/fee payment for a graduate student employed simultaneously as a 25% Teaching Assistant and a 25% Graduate Student Researcher will be paid in full via GSR Tuition Fee Remission. The GSR salary fund source will be charged the full GSRTF rate through PPS as usual.

GSR PARTIAL MONTH PAYMENT FORMULA

You can use the following Partial Month Factor Chart to calculate how much a GSR will be paid when employed for only part of a month.

To determine the number of days in a month, count all Mondays – Fridays; including holidays.

For all calculations; figure to 6 decimals and round to 4 decimals.

The payroll formula is:

1. (Partial Month Factor) x (Percent Time Employed) = Y
   
   1. (Y) x (Monthly Pay rate) = Amount paid

Example:

Student worked 7 days out of 22 day month; 49.31% at $2966/month

1. (.3182) x (.4931) = .1569
2. (.1569) x ($2966) = $465.37

CHART OF PARTIAL MONTH FACTORS

<table>
<thead>
<tr>
<th>Days Worked</th>
<th>Days Per Month</th>
<th>Days Worked</th>
<th>Days Per Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>.0500 .0476 .0455 .0435</td>
<td>12</td>
<td>.6000 .5714 .5455 .5217</td>
</tr>
<tr>
<td>2</td>
<td>.1000 .0952 .0909 .0870</td>
<td>13</td>
<td>.6500 .6190 .5909 .5652</td>
</tr>
<tr>
<td>3</td>
<td>.1500 .1429 .1364 .1304</td>
<td>14</td>
<td>.7000 .6667 .6364 .6087</td>
</tr>
<tr>
<td>5</td>
<td>.2500 .2381 .2273 .2174</td>
<td>16</td>
<td>.8000 .7619 .7273 .6957</td>
</tr>
<tr>
<td>6</td>
<td>.3000 .2857 .2727 .2609</td>
<td>17</td>
<td>.8500 .8095 .7727 .7391</td>
</tr>
<tr>
<td>7</td>
<td>.3500 .3333 .3182 .3043</td>
<td>18</td>
<td>.9000 .8571 .8182 .7826</td>
</tr>
<tr>
<td>8</td>
<td>.4000 .3810 .3636 .3478</td>
<td>19</td>
<td>.9500 .9048 .8636 .8261</td>
</tr>
<tr>
<td>9</td>
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<td>20</td>
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</tr>
<tr>
<td>10</td>
<td>.5000 .4762 .4545 .4348</td>
<td>21</td>
<td>1.0000 .9545 .9130</td>
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<tr>
<td>11</td>
<td>.5500 .5238 .5000 .4783</td>
<td>22</td>
<td>1.0000 .9565</td>
</tr>
</tbody>
</table>
DATA ENTRY GUIDELINES

Graduate Student Researcher – #3266 (Not eligible for Tuition-and-Fee Remission)

Payroll online entries are:

APPOINTMENT LINE
Type  5
Basis  11
Pd Ovr  12
Appt Begin  See Below
Appt End  See Below
Dept  Funding source 6-digit dept. code number
Title  3266
% Full  Round off, example 0.1599 will become 0.16
F/V  F (fixed)
Annual  Can leave blank, 11/12 will trigger system to multiply monthly rate
        by 12 to equal the annual amount
Rt  A (Annual)
Sch  MO (Monthly)
Time  N = No Time Sheet
Lv  N = No leave accrual

DISTRIBUTION LINE
Index  Your index
Sub  0
Dist %  Fill in exact percent, example, 0.1599
Pay Begin  See Below
Pay End  See Below
Rate/Amount  XXXX.XX (Refer to salary rate chart)
Step  1 (through 10) (Refer to step level chart)
DOS code  REG

The appointment begin and end dates should reflect the period of the appointment; Fall GSRs are most often appointed from mid-September to 12/31, Winter appointments are usually 1/1 – 3/31, and Spring appointments are usually 4/1 – 6/30.

*Percent Time:  If the GSR is appointed at 25% time or more for Fall, Winter or Spring quarters, the student must be on the GSRTF (3262, 3263, 3264, 3284, 3285, 3286, 3287) title codes unless the student is not eligible for one the reasons outlined earlier in this chapter.
DATA ENTRY GUIDELINES

Graduate Student Researcher Tuition and Fee Remission –
Title codes 3262, 3263, 3264, 3284, 3285, 3286, 3287

Payroll online entries are:

APPOINTMENT LINE
Type  5
Basis  11
Pd Ovr  12
Appt Begin  See Below
Appt End  See Below
Dept  Funding source 6 digit dept. code number
Title  3284 (or 3262, 3263, 3264, 3285, 3286, or 3287)
% Full  Round off, example 0.4999 will become 0.50
F/V  F (fixed)
Annual  Can leave blank, 11/12 will trigger system to multiply the monthly rate
        by 12 to equal the annual amount
Rt  A (Annual)
Sch  MO (Monthly)
Time  N = No Time Sheet
Lv  N = No leave accrual

DISTRIBUTION
Index  your index
Sub  0
Dist %  Fill in exact percent, example 0.4999
Pay Begin  See Below
Pay End  See Below
Rate/Amount  XXXX.XX (Refer to salary chart)
Step  1 (though 10)  (Refer to step level chart)
DOS code  REG

Appointment Begin and End Dates
The GSRTF title codes 3262, 3263, 3264, 3284, 3285, 3286, or 3287 can only be used during the period 10/1 – 6/30. This nine-month period is divided into three segments of three full months for each quarter, and appointments usually reflect these dates:
Fall = 10/1 – 12/31; Winter = 1/1 – 3/31, and Spring = 4/1 – 6/30. Use MMDDYY format.
# GRADUATE STUDENT NEW HIRE DATA COLLECTION WORKSHEET

(For Completion of Mandatory Fields)

**SAMPLE GRADUATE STUDENT RESEARCHER WITH T/F REMISSION (3262, 3263, 3264, 3284, 3285, 3286, 3287)**

**OR WITH NO T/F REMISSION (3266)**

<table>
<thead>
<tr>
<th>(EEID) Social Security Number</th>
<th>123456789</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>Richard</td>
</tr>
<tr>
<td>First Name</td>
<td>Middle</td>
</tr>
<tr>
<td>Date of Birth:</td>
<td>031471</td>
</tr>
</tbody>
</table>

**(EPD1)**

<table>
<thead>
<tr>
<th>Sex: M_ (M or F)</th>
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</thead>
<tbody>
<tr>
<td>Hispanic:</td>
</tr>
<tr>
<td>American Indian or Alaska Native:</td>
</tr>
<tr>
<td>Asian:</td>
</tr>
<tr>
<td>Black/African American:</td>
</tr>
<tr>
<td>Native Hawaiian or Other Pacific Islander:</td>
</tr>
<tr>
<td>White:</td>
</tr>
<tr>
<td>Primary Ethnic/Race: ___ (see page 5-8)</td>
</tr>
<tr>
<td>Disabled Status: _____ (see page 5-8)</td>
</tr>
<tr>
<td>Veteran Status Codes – Vietnam:</td>
</tr>
<tr>
<td>War/Campaign:</td>
</tr>
<tr>
<td>Oth Status:</td>
</tr>
<tr>
<td>Serv Medal:</td>
</tr>
<tr>
<td>(N or V)</td>
</tr>
<tr>
<td>(N or E = Veteran)</td>
</tr>
<tr>
<td>(see page 5-8)</td>
</tr>
<tr>
<td>Recently Separated Veteran Date:</td>
</tr>
<tr>
<td>Citizenship:</td>
</tr>
<tr>
<td>(C = Citizen, R = Resident Alien, N = Non-Resident Alien, A= Canada, Mexico, S. Korea, S = India)</td>
</tr>
<tr>
<td>Student Status: 4 (Grad) No. of Reg. Units: ___ (leave blank)</td>
</tr>
<tr>
<td>Stu/Reg: ___ (leave blank)</td>
</tr>
</tbody>
</table>

**(EPD2)**

<table>
<thead>
<tr>
<th>Oath Signature Date: 1001XX</th>
<th>NOTE: The oath must be signed on or before the first day of employment.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date: 1001XX</td>
<td>NOTE: Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.</td>
</tr>
</tbody>
</table>

**(EADR)**

<table>
<thead>
<tr>
<th>Permanent Address</th>
<th>Line 1: (only use for P.O. Box, route number or c/o line)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Important to keep current.</td>
<td>Line 2: 215 Main Street</td>
</tr>
<tr>
<td>City:</td>
<td>San Diego</td>
</tr>
<tr>
<td>State:</td>
<td>CA</td>
</tr>
<tr>
<td>Zip:</td>
<td>92014</td>
</tr>
<tr>
<td>Home Phone:</td>
<td></td>
</tr>
</tbody>
</table>
Campus Release Codes – Perm Address: _____ Home Phone: _____ Spouse Name: _____

For all of the above: Blank = No (do not release information), Y= Yes (release information) , N=No

Employee Organization Disclosures – Perm Address: _____ Home Phone: _____

For all of the above: Blank = Yes (release information) , N= No, Y= Yes

Mail Code: 0521 _______ (This is where the paycheck, direct deposit pay stub, and W2 form are sent).

(ETAX) Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.

Federal: Marital Status: _____(M)arried  S (S)ingle  Personal Allowances: 1

State: Marital Status: _____(M)arried  S (S)ingle  _____(H)ead of Household

Personal Allowances: 1  Itemized Deductions: __________

Addl Fed Tax Withholding: (leave blank) _________ Addl Fed Nonres Alien Tax: _________

(EALN) For non-U.S. citizens only. Refer to payroll instructions.

Country Code: _____ Visa Type: _____ Visa/Work Permit End Date: ______________ US Date of Entry

(F1: see line 5 on I-20; J1: see line 3 of DS-2019)

(EAPC)

APPOINTMENT:

Type: 5 Basis 11 Pd Ovr 12 Begin Date 1001XX End Date 0630XX Dur: (blank) Dept Code 000326

Title Code 3284 %Full 0.50 F/V F Ann/Hr Rate (leave blank) Rt A Sch MO Time N Lv N (or 3262, 3263, 3264, 3284, 3285, 3286, 3287 - or 3266 for no T/F Remission.).

DISTRIBUTION:

Index (your index) Sub 0 Dist % 0.4999 Beg Date 1001XX End Date 0630XX Step 4 Amount XXXX.XX

Dos REG (no decimal)

(EPER)

BELI 5 Effective Date: 1001XX

Date of Hire: 1001XX Original Date of Hire: 1001XX

Employee Relations Code: E Employee Relations Unit: 99

NOTE: System will automatically populate if “E” is ERC code

Home Dept Code: (must be Grad’s academic dept code) _________ Timekeeper Code: _________

College Code: 00
9. Academic Student Employment System (ASES)

RECRUITING TA/READER/TUTOR/UGIA/ASSOCIATE-IN POSITIONS

The Office of the Executive Vice Chancellor has developed an online system that helps academic departments and programs to facilitate the assignment and hiring process for students applying for TA, Reader, Tutor, Undergraduate Instructional Apprentice, and Associates-In positions.

The Academic Student Employment System (ASES) allows departmental staff to create custom questionnaires for Academic Student Employee positions they want to fill, and provides a way for students to apply for those positions online. Departments and programs that already know who will fill these positions can simply assign the students and send them offers through the system.

ASES provides additional data from various campus resources on each applicant, to help facilitate the decision-making process and to provide a single repository for relevant data. The system also provides the opportunity for instructors to select and rank applicants, if the department/program wishes to include instructor input in the decision-making process. ASES also streamlines the approval process for graduate students being hired outside their home departments.

Once a final hiring decision is made, departmental staff assign the student to a class and make an offer through ASES. The student is sent an e-mail notification, which includes instructions and a link back to the system, where he/she can accept or decline the offer. For paid assignments, the system generates a PDF appointment letter, which the student is required to open before he/she can accept the offer.

The ASE assignments also make it easy for an academic department or program to participate in the online Evaluations system. This system, which launched in Spring 2012, allows students to evaluate their ASEs and graduate courses, and instructors to evaluate their ASEs.

To obtain access, please contact Stephen Hamilton at x26494. To start the recruiting process for your department, go to http://academicaffairs.ucsd.edu/Modules/ASES.
10. Guide for Teaching Assistants

TEACHING ASSISTANT – TITLE CODE 2310

A Teaching Assistant (TA) assists in the instruction of an upper or lower division course at the University under the supervision of a faculty member. The TA primarily assists the faculty member in charge of the course by conducting discussion or laboratory sections that supplement faculty lectures and by grading assignment and examinations.

A TA may also assist with the development of assignments or exams, hold office hours, and proctor exams. In the case of basic language, reading and composition, some other skills-building courses, and a few other courses, a Teaching Assistant may lead the class meetings, but as with all other TAs, the general instructional content of the course as well as the official assignment of student grades and decisions on grade appeals are the responsibility of the faculty member in charge of the course. In no instance shall a Teaching Assistant be assigned responsibility for the entire instruction of a course.

An international graduate student whose undergraduate degree is not from an English-speaking college or university, or who has serious pronunciation problems, may not serve as a TA until s/he has been certified to have the requisite English language skills. This English language policy does not apply to a student who serves as a TA which is conducted in his/her native language. For further information, contact the English Language Program for International Instructors, Teaching + Learning Commons, (858) 534-3981

IMPORTANT INFORMATION THAT AFFECTS PAYCHECKS AND FEE PAYMENTS

Appointment Begin/End Dates – Service Period vs. Pay Period

TAs have a service period (dates worked) that is different than the pay period (dates in PPS). The service period is the first day of the quarter through the last day of the quarter (ex. fall quarter begins mid-September and ends mid-December). The standard pay period in PPS will ALWAYS be entered with the following appointment and distributions begin and end dates:

Fall 10/01 - 12/31
Winter 01/01 – 03/31
Spring 04/01 – 06/30

These standard pay period dates were established so that TAs receive three equal paychecks per quarter regardless of the actual quarter begin and end dates.

WARNING: Due to the differences between pay periods versus service period, no changes can be made to a TA appointment in the middle of the quarter or the system will pay the TA incorrectly.
1. Do not change standard begin/end dates.
2. Do not change the funding source in the middle of the quarter.
3. Do not change the percent time in the middle of the quarter.

In order to pay the student correctly, it is necessary to compute the TA daily rate of pay (see formula following this section). The computer cannot automatically pay a TA daily rate of pay properly. Payroll must manually adjust the check. Always call the Graduate Division (see page 3) prior to entering a TA daily rate of pay action on-line into PPS.

Note: Ending a TA early may affect his eligibility to receive fee payments.

**OATH**

When using a 10/01 start date for a new hire TA, the oath must be signed on or before the first day of the quarter (not the pay period). For example, if fall quarter begins on 9/22, the oath must be signed by that date, not on 10/1 which is the pay period start date.

**Important:** If the oath is not signed on time a damage claim must be submitted. Refer to PPM 395-2 for instructions.

**SPRING QUARTER TA AND OTHER SUMMER APPOINTMENTS**

A graduate student appointed as a TA spring quarter may be appointed (depending on the Home Department’s summer support policy) up to 100% time as a GSR (or other title) beginning the day after the quarter ends (mid-June). Although it may look like the student is appointed up to 150% time, the TA service period ends the last day of the spring quarter so it is not a conflict.

**BREAK-IN-SERVICE AND FALL QUARTER TA**

It is not considered a break-in-service (requiring a Rehire action) if summer employment ends the last day of the summer (mid-September) and the student is a TA Fall quarter (begins work mid-September). Although the Payroll online entries may look unusual with a mid-September end date and then a 10/1 TA begin date, this is correct and is not considered a break-in-service because of the TA service period.

**TAS APPOINTED AT 25% TIME OR MORE RECEIVE TAHI/TAFE**

TAs appointed at 25% time or more for the entire quarter (or 50% for half the quarter) are eligible for TA Health Insurance (TAHI) and TA Fee Remission (TAFE) fee payments. TAFE pays Tuition and the Student Services Fee. The students’ eligibility must be confirmed with their Graduate Academic Department Support Coordinator. The student’s home academic department is responsible for submitting TAHI/TAFE payment requests online using the Graduate Division Financial Support Tool at [https://goapp.ucsd.edu/financial/](https://goapp.ucsd.edu/financial/).
Additionally, an ASE who is a registered graduate student with (an) ASE appointment(s) or other eligible academic appointment(s) totaling 25% or more for the entire quarter is eligible for TA Health Insurance (TAHI) and TA Fee Remission (TAFE) fee payments.

**TA LOAN/FEE DEFERMENT PROGRAM**

TAs may be able to apply for the TA Loan Program (available fall quarter only) or the TA Fee Deferment Program. Contact the Graduate Division, x46562, for additional information.

**TEACHING ASSISTANT DAILY RATE OF PAY**

Occasionally a Teaching Assistant is appointed for other than the entire quarter. The appointment may begin late or end early. In a few cases, a student might add an extra section after the quarter has begun and the TA percent time needs to be increased for part of the quarter. These situations should be avoided whenever possible and are treated as an exception by the Graduate Division.

If the appointment must change mid-quarter, please contact the Graduate Division immediately to determine whether the action will require written approval by the Dean of the Graduate Division. Due to the fact that TAs have a different pay period versus service period, the above situations result in a TA daily rate of pay. The Graduate Division can assist you with calculating the daily rate of pay and completion of the online entry for the TAship. **For all TA Daily Rate actions, you must copy the correct Payroll contact on the PAN notice, so that they know to adjust the payment to the student accordingly.**

**Payroll Contacts:**

(A-G) – David Smith (dlsmith@ucsd.edu)
(H-O) – Gloria Poon (gpoon@ucsd.edu)
(P-Z) – Sara Sterling-Bonnin (sesterlingbonnin@ucsd.edu)

**Important:** If a TA ends early and does not work 50% time for at least half the quarter, they become ineligible for the TAHI/TAFE fee payment that Graduate Division paid at the start of the quarter. Inform the student, and contact the Graduate Division as needed.

**Calculation of the TA salary is as follows:**

1. Multiply the 100% monthly rate times three (to equal the 100% rate for the quarter.
2. Divide this answer by the number of days in the quarter (to equal the 100% daily rate of pay).
3. Multiply the 100% daily rate of pay by the percent of the appointment.
4. Multiply this answer by the number of days (Monday through Friday) worked in the quarter.
IMPORTANT:
When inputting the action, if the TA starts late, use the first day of employment as the begin date and use the last day of the service month as the end date. For example, if a fall TA started late on October 5, the dates online would be 10/5 – 12/31.

If a TA ends early, for example on 10/17, use the last day of the service month as the end date but put the actual dates worked in the comments section. For example, 10/1 – 10/31 online but in the comments section, put 9/XX (Fall quarter begin date) – 10/17, actual dates worked. The comments sections should begin “TA Daily Rate of Pay” and then give the dates worked and the calculations for the payment.

EXAMPLE:
A 50% fall quarter TA resigns 10/14. The start of the quarter was 9/19 (for this example only); therefore, the student worked from 9/19 to 10/14 for a total of 20 days (M-F). The quarter has 60 days (for this example only).

Note: the number of days in each quarter is found on the Registrar’s Academic and Administrative calendar at:
http://blink.ucsd.edu/instructors/resources/academic/calendars/index.html

The calculations are as follows:

$4119.56 (use current monthly salary) x 3 (months in quarter) = $12,358.68

\[
\frac{12,358.68}{60\text{ (days in quarter)}} = 205.98
\]

205.98 x 0.50 (percent time) = 102.989 (daily rate of pay)

102.99 x 20 (days worked) = 2059.80

The total payment to the student is $2059.80

COMMENTS:

ATTN: PAYROLL ACTION – TA DAILY RATE OF PAY
Student resigned 10/14 and withdrew.
TA service period 9/19 – 10/14 (20 days worked).
20 days worked x $102.99 (50% TA Daily rate of pay) = $2059.80
DATA ENTRY GUIDELINES

2310 – Teaching Assistant

Teaching Assistants are always set up using the pay period dates as follows:
Fall = 10/01 – 12/31
Winter = 01/01 – 03/31
Spring = 04/01 – 06/30

Payroll on-line entries are:

APPOINTMENT LINE
Type  5
Basis  09
Pd. Ovr 09
Appt Begin See Below
Appt End See Below
Dept Funding source 6-digit dept. code number
Title 2310
% Full 0.50 (for example)
F/V F (Fixed)
Annual Can leave blank, 09/09 basis/pd ovr will trigger system to multiply monthly rate
by 9 to equal the amount
Rt A (Annual)
Sch MO (Monthly)
Time N (No time sheet)
Lv N (No Leave Accrual)

DISTRIBUTION LINE
Index Your index
Sub 0
Dist % Fill in exact percent, example 0.5000
Pay Begin See Below
Pay End See Below
Rate/Amount XXXX.XX (refer to salary rate chart)
DOS Code REG

Appointment Begin and End Dates

For TAs, the appointment begin and end dates are standard dates:
Fall = 10/1 – 12/31, Winter = 01/01, = 03/31 and Spring = 04/01 – 06/30.

These standard pay period dates were established so that TAs receive 3 equal paychecks per quarter; however, the service period is the actual quarter dates. Dates are completed in MMDDYR format, example Fall YR = 1001YR – 1231YR.
GRADUATE STUDENT NEW HIRE DATA COLLECTION WORKSHEET
(For Completion of Mandatory Fields)
SAMPLE TEACHING ASSISTANT (2310) - FALL QUARTER

(EEID)

Social Security Number      123456789
Jonathan   Richard   Sampleton   _____
First Name   Middle   Last Name    Suffix (Jr./Sr)
Date of Birth:        031471

(EPD1)

Sex:       M____(M or F)
Hispanic:   ___
American Indian or Alaska Native:   ___  Asian:   ___  Black/African American:   ___
Native Hawaiian or Other Pacific Islander:   ____  White:   ____
Primary Ethnic/Race:   ____ (see page 5-8)
Disabled Status:   ____  (see page 5-8)
Veteran Status Codes – Vietnam:  ______  War/Campaign:  ______  Oth Status:   ______  Serv Medal:   ______
(N or V)          (N or E = Veteran)        (see page 5-8)
Recently Separated Veteran Date:   ______
Citizenship:   _____  (see page 5-8)
(C = Citizen, R = Resident Alien,  N = Non-Resident Alien, A= Canada, Mexico, S. Korea, S = India)
Student Status:   4  (Grad) No. of Reg. Units:   ____ (leave blank)
Stu/Reg:     ___(leave blank)

(EPD2)

Oath Signature Date:   09XXXX   NOTE:  For TAs, the oath must be signed by the first day of the quarter.
I9 Date:  09XXXX       NOTE:  Employees must complete and sign Section 1 of Form I-9 no later than
the first day of employment, but not before accepting a job offer.
Permanent Address Line 1: (only use for P.O. Box, route number or c/o line) __________________________________________________________
Important to keep current. Line 2: 215 Main Street ______________________________________________________________
City: San Diego State CA Zip: 92014
Home Phone: ___________________________
Campus Release Codes – Perm Address: _____ Home Phone: _____ Spouse Name: _____
For all of the above: Blank = No (do not release information), Y= Yes (release information) , N=No
Employee Organization Disclosures – Perm Address: _____ Home Phone: _____
For all of the above: Blank = Yes (release information) , N= No, Y= Yes
Mail Code: 0139__ (This is where the paycheck, direct deposit pay stub, and W2 form are sent).

Federal: Marital Status: _____(M)arried _____S_____ (S)ingle Personal Allowances: _____
State: Marital Status: _____(M)arried _____S_____ (S)ingle _____(H)ead of Household
Personal Allowances: _____ Itemized Deductions:
Addl Fed Tax Withholding: (leave blank) _________ Addl Fed Nonres Alien Tax: _________

Country Code: ______  Visa Type: ______ Visa/Work Permit End Date: __________ US Date of Entry ____________
(F1: see line 5 on I-20; J1: see line 3 of DS-2019)

Type: _____ Basis 09 Pd Ovr 09 Begin Date 1001XX End Date 1231XX Dur: (blank) Dept Code 000326
Title Code 2310 % Full 0.50 F/V F Ann/Hr Rate xxx,xxx,xx Rt A Sch MO Time N Lv N
DISTRIBUTION:
Index (your index) Sub 0 Dist % 0.5000 Beg Date 1001XX End Date 1231XX Step __ Amount XXXX.XX
Dos REG
(EPER)

BELI  5  Effective Date:  1001XX
Date of Hire:  1001XX  Original Date of Hire:  1001XX
Employee Relations Code: E  Employee Relations Unit: BX
NOTE: System will automatically populate if “E” is ERC code
Home Dept Code: (must be Grad’s academic dept code) ________  Timekeeper Code: ________
College Code:  00

Comments:  TA 2310, 50%, 10/1-12/31, TAHI/TAFE = FWS

ASSOCIATE (TEACHING A COURSE) – TITLE CODE 1506

A graduate student Associate (teaching a course) may conduct the entire instruction of a lower-division course or upper division course with approval granted by the Dean of the Graduate Division.* The Associate is assigned a faculty mentor to provide guidance and training as needed.

A graduate student must have demonstrated a talent for classroom teaching and have advanced training in the subject matter. For Ph.D. students, the candidacy exam must have been passed and the student must be in the final stages of dissertation writing or must have the equivalent other accomplishments (publications, extensive experience as performer-teacher, or the like). MFA students should be in the second to last or last quarter. The appointment is also dependent upon positive academic and administrative review and approval by the student's department/group Chair, Divisional Dean/Provost, and Dean of the Graduate Division.

For requests to teach in Summer Session, students must be registered for the Spring Quarter prior to, or the Fall Quarter following, the requested Summer Session.

Academic files must be submitted using ASES at [http://academicaffairs.ucsd.edu/Modules/ASES](http://academicaffairs.ucsd.edu/Modules/ASES). Unlike TAships, where students apply for a position, departments submit an Associate application on behalf of a student. Once submitted, the application is then routed for review to the student, Faculty Mentor (listed as Supervising Faculty on ASES), Department Chair, Divisional Dean/Provost Office and/or Summer Session who will route the file through the Graduate Division for the Dean’s review and approval. Note that Divisional Dean’s Offices only review Academic Year appointments. If an exception is requested for an upper-division course, the application will also be submitted to CEP for review and approval.

When creating an application for a student, the department completes the Position details section in ASES and answers questions 1-13. Note that the completion of these questions replaces two forms that are no longer required: the Academic Appointment Summary form and the Request to Appoint Associate-in for UD courses. In addition, note that for requests to teach lower-division classes, you will not need to complete questions 6-13 on the application.

A current Spring evaluation is required for all Associate in requests. See policy at: [http://grad.ucsd.edu/resources/general/academic-policies/evaluations.html](http://grad.ucsd.edu/resources/general/academic-policies/evaluations.html).

For the Documents section, you may upload all documents using Portrait Orientation as one pdf or as separate pdfs.

Documents required include:

1. Department Chair or Program Director/Divisional Dean Memo/Letter addressed to the Dean, Graduate Division
2. Current Curriculum Vitae or Academic Biography
3. Copies of Teaching Evaluations (not already submitted through CAPES) or Reference Letter

Summer Graduate Teaching Scholars also need to be submitted through ASES. Complete the Position details section, answer questions 1-5 and upload a copy of the SGTS nomination packet under question 14.

Approval status may be tracked under Application Status on the Applicants page of ASES. In addition, the system will generate an Appointment letter which includes the following message for applications not yet approved:

*Note: this assignment has not yet been approved by the Dean of the Graduate Division, so this document should not be considered a final appointment letter. This notice will not appear once the assignment has been approved by the Dean of the Graduate Division.*

*General information regarding the Committee on Education Policy may be found on the Academic Senate web page at: https://senate.ucsd.edu/*

*The policy regulating the appointment of graduate students as Associates-In to teach undergraduate upper-division courses may be found at: http://senate.ucsd.edu/media/67798/Associates-In-to-Teach-Upper-Division-Courses.pdf. The policy regarding written assessments of the Associate in’s performance may also be found at the above link.*

**Timeline:** A new campaign will need to be created for each quarter before departments can submit files. The Graduate Division will notify departments when the application becomes available.

**Applications for upper-division courses must be routed to the Graduate Division for review four weeks (counted in business days) prior to the start of the quarter in which a course is to be taught.**

**ASSOCIATE (IN LIEU OF TA) – TITLE CODE 1506**

An Associate (in lieu of TA) may serve as a “senior TA” for a department/program’s TA training activities, as a TA consultant or Language Screener for the Teaching + Learning Commons, or under an Academic Instructional Improvement grant. Use of this title for any other program requires prior approval by the Dean of the Graduate Division.

Payroll online entries vary depending on the approved program’s use of the title. If you are unsure how to complete, call the Graduate Division for assistance.
DATA ENTRY GUIDELINES

Associate – Title Code 1506

**Associate (Teaching a Course)** - This appointment requires pre-approval and review of the appointment file by the Dean of the Graduate Division and the Divisional Dean/Provost. Graduate students are usually appointed at 50% time for teaching one course.

**Associate (in lieu of TA)** – The use of this title is approved for specific programs only such as the Teaching + Learning Commons. Any other departmental usage requires pre-approval of the Dean of the Graduate Division.

Payroll online entries are:

**APPOINTMENT LINE**

| Type  | 5 |
| Basis | 09 |
| Pd Ovr | 09 |
| Appt Begin | See Below |
| Appt End | See Below |
| Dept | Funding source 6-digit dept. code number |
| Title | 1506 |
| % Full | Example, 0.50 |
| F/V | F (Fixed) |
| Annual | Can leave blank, 09/09 will trigger system to multiply monthly rate by 9 to equal annual amount. |
| Rt | A (Annual) |
| Sch | MO (Monthly) |
| Time | N (No time sheet) |
| Lv | N (No Leave accrual) |

**DISTRIBUTION LINE**

| Index | Your index |
| Sub | 0 |
| Dist % | Fill in exact percent, example 0.5000 |
| Pay Begin | See Below |
| Pay End | See Below |
| Rate/Amount | XXXX.XX (Refer to salary rate chart) |
| DOS code | REG |

For Associate (teaching a course) use standard begin and end dates as follows: Fall = 10/1 – 12/31; Winter = 1/1 – 3/31; Spring = 4/1 – 6/30, using MMDDYY format.
### GRADUATE STUDENT NEW HIRE DATA COLLECTION WORKSHEET
(For Completion of Mandatory Fields)
SAMPLE ASSOCIATE (1506) - FALL QUARTER

<table>
<thead>
<tr>
<th>(EEID)</th>
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<tbody>
<tr>
<td>Social Security Number</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Middle Name</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>Date of Birth</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(EPD1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sex: M (M or F)</td>
</tr>
<tr>
<td>Hispanic:</td>
</tr>
<tr>
<td>American Indian or Alaska Native: A  Asian: A  Black/African American: A  Native Hawaiian or Other Pacific Islander: A  White: A</td>
</tr>
<tr>
<td>Primary Ethnic/Race: A  (see page 5-8)</td>
</tr>
<tr>
<td>Disabled Status: A  (see page 5-8)</td>
</tr>
<tr>
<td>Veteran Status Codes – Vietnam: A  War/Campaign: A  Oth Status: A  Serv Medal: A  (N or V)  (N or E = Veteran)  (see page 5-8)</td>
</tr>
<tr>
<td>Recently Separated Veteran Date: A</td>
</tr>
<tr>
<td>Citizenship: A  (C = Citizen, R = Resident Alien, N = Non-Resident Alien, A= Canada, Mexico, S. Korea, S = India)</td>
</tr>
<tr>
<td>Student Status: A  (Grad)  No. of Reg. Units: A  (leave blank)</td>
</tr>
<tr>
<td>Stu/Reg: A  (leave blank)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(EPD2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oath Signature Date: 09XXXX  NOTE: The oath must be signed by the first day of the quarter.</td>
</tr>
<tr>
<td>I9 Date: A  09XXXX  NOTE: Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.</td>
</tr>
</tbody>
</table>

<table>
<thead>
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<th>(EADR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent Address Line 1: (only use for P.O. Box, route number or c/o line)</td>
</tr>
<tr>
<td>Important to keep current. Line 2: 215 Main Street</td>
</tr>
<tr>
<td>City: A  San Diego  State: A  CA  Zip: A  92014</td>
</tr>
<tr>
<td>Home Phone: A</td>
</tr>
<tr>
<td>Campus Release Codes – Perm Address: A  Home Phone: A  Spouse Name: A</td>
</tr>
<tr>
<td>For all of the above: Blank = No (do not release information), Y= Yes (release information) , N=No</td>
</tr>
</tbody>
</table>

11-4
Employee Organization Disclosures – Perm Address: _______ Home Phone: _______
For all of the above: Blank = Yes (release information), N= No, Y= Yes
Mail Code: 0139 (This is where the paycheck, direct deposit pay stub, and W2 form are sent).

(EADR) continued

(ETAX) Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.
Federal: Marital Status: _____(M)arried  S(S)ingle  Personal Allowances:  1
State: Marital Status: _____(M)arried  S(S)ingle  _____(H)ead of Household
Personal Allowances:  1  Itemized Deductions:_______
Addl Fed Tax Withholding: (leave blank) ____________  Addl Fed Nonres Alien Tax: ____________

(EALN) For non-U.S. citizens only. Refer to payroll instructions.
Country Code: _______ Visa Type: _______ Visa/Work Permit End Date: ____________ US Date of Entry ____________
(F1: see line 5 on I-20; J1: see line 3 of DS-2019)

(EAPC)
APPOINTMENT:
Type: ___Basis 09 Pd Ovr 09 Begin Date 1001XX End Date 1231XX Dur (blank) Dept Code 000326
Title Code 1506 %Full 0.50 F/V F_Ann/Hr Rate (leave blank) Rt A_Sch MO_Time N_Lv N
DISTRIBUTION:
Index (your index) Sub 0 Dist % 0.5000 Beg Date 1001XX End Date 1231XX Step Amount XXXX.XX Dos REG

(EPER)
BELI 5  Effective Date: 1001XX
Date of Hire: 1001XX  Original Date of Hire: 1001XX
Employee Relations Code: E  Employee Relations Unit: BX
NOTE: System will automatically populate if “E” is ERC code
Home Dept Code: (must be Grad’s academic dept code) .
Timekeeper Code: _________
College Code: 00

Comments: Associate (Teaching a Course) 1506, 50%, 10/1-12/31

READER –TITLE CODE 2850
A Reader assists a course instructor by grading homework, papers, or exams and may also hold office hours to answer students’ questions about such assignments.

Readers are always set up on sub-2 and subject to positive time reporting using the On-Line Timekeeping system. If there is already an existing monthly appointment in PPS, then readers should be paid at the monthly rate so it will not conflict with the concurrent monthly appointment (cannot be hourly and monthly at the same time).

READERS APPOINTED AT 25% TIME OR MORE RECEIVE TAHI/TAFE
Effective fall quarter 2011, GSHIP, Tuition and Student Services fee payments will be issued for Readers and Tutors (25% minimum) at the beginning of the quarter based upon the assumption that the student will work the minimum number of hours required for fee remission (110 hours). Note that fee remission will not be paid at the start of the quarter if the student has a registration or financial “hold” placed on his account because the student is in arrears from a previous quarter.

If the student does not work the required number of hours by the end of the quarter, the fee payments will be rescinded and the amount must be repaid either by the student or by the department through block grant fee scholarship.

The academic home department should report Readers (25% minimum) to the Graduate Division in a manner similar to reporting a 25% TA. If a department reports hiring a 25% Reader, the department must ensure that the student is time reported for at least 110 hours in the payroll timekeeping system.

Departments are responsible for auditing reader hours to ensure eligibility.

The hiring department must coordinate the fee payment request with the student’s home department at the time pre-approval for employment is requested. Home departments are responsible for submitting fee payment requests for all their students regardless of where the students are employed on campus.

Timely fee payment submission and PPS time reporting is mandatory in accordance with the ASE-UAW contract and university policy.

NOTE: If the student is already set up as a Teaching Assistant or other monthly appointment and you are adding a concurrent readership, you MUST add the reader at a monthly rate.
Payroll on-line entries are:

**APPOINTMENT LINE**
Type  5
Basis  09
Pd Ovr  09
Appt Begin  See Below
Appt End  See Below
Dept  Funding source 6-digit dept. code number
Title  2850
% Full  Example, 0.25
F/V  V (Variable subject to time reporting on PTR)
Annual  Use hourly rate if paid hourly, annual if paid monthly
Rt  H if hourly, A if Annual
Sch  BW if bi-weekly/hourly, and MO if monthly
Time  A (to generate Payroll Time Record)
Lv  N (No Leave Accrual)

**DISTRIBUTION LINE**
Index  your index
Sub  2
Dist %  Fill in estimated percent, example 0.2500 or 0.5000
Pay Begin  See Below
Pay End  See Below
Rate/Amount  XXXX.XX (refer to salary rate chart)
DOS Code  REG

**Appointment Begin and End Dates**
Reader begin and end dates can vary. Some Reader appointments are set up for the actual quarter dates and others are set up for the Fall quarter begin date through 12/31, Winter from 1/1 - 3/31 and Spring from 4/1 – 6/30. When using a 10/01 start date for a new hire reader, the oath must be signed on or before the first day of the quarter (not the pay period). For example, if fall quarter begins on 9/22, the oath must be signed by that date, not on 10/1 which is the pay period start date.

**NOTE:** If the student is already set up as a Teaching Assistant and you are adding a concurrent Reader appointment, you must add the Reader at a monthly rate.
GRADUATE STUDENT NEW HIRE DATA COLLECTION WORKSHEET
(For Completion of Mandatory Fields)
SAMPLE READER (2850) at HOURLY RATE

(EEID)
Social Security Number  123456789

Jonathan            Richard          Sampleton  _____
First Name           Middle           Last Name    Suffix (Jr./Sr)

Date of Birth:       031471

(EPD1)
Sex:                M___(M or F)
Hispanic: ___

American Indian or Alaska Native:   ___  Asian:   ___  Black/African American:   ___
Native Hawaiian or Other Pacific Islander:   ____  White:   ____
Primary Ethnic/Race:   ____  (see page 5-8)

Disabled Status:   _____  (see page 5-8)

Veteran Status Codes – Vietnam:   ______  War/Campaign:   ______  Oth Status:   ______  Serv Medal:   ______
(N or V)                  (N or E = Veteran)    (see page 5-8)

Recently Separated Veteran Date:   ______
Citizenship:   _____
(C = Citizen, R = Resident Alien,  N = Non-Resident Alien, A= Canada, Mexico, S. Korea, S = India)

Student Status:   4  (Grad)    No. of Reg. Units:   ____  (leave blank)

Stu/Reg:   ____ (leave blank)

(EPD2)
Oath Signature Date:   1001XX  NOTE: The oath must be signed by the first day of the quarter.

I9 Date:   1001XX  NOTE: Employees must complete and sign Section 1 of Form I-9 no later than
the first day of employment, but not before accepting a job offer.

(EADR)
Permanent Address  Line 1: (only use for P.O. Box, route number or c/o line)________________________
Important to keep current. Line 2:   215 Main Street________________________
City:       San Diego                 State  CA__________  Zip: 92014____
Home Phone:  ___________________________

Campus Release Codes – Perm Address:   _____ Home Phone:   _____  Spouse Name:   _____
For all of the above: Blank = No (do not release information), Y= Yes (release information) , N=No
Employee Organization Disclosures – Perm Address:   _____ Home Phone:   _____
For all of the above: Blank = Yes (release information), N= No, Y= Yes

12-3
(EADR) continued
Mail Code:  0139__(This is where the paycheck, direct deposit pay stub, and W2 form are sent).

(ETAX)  Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.
Federal:  Marital Status: _____(M)arried       S  (S)ingle  Personal Allowances:    1
State:  Marital Status:     _____(M)arried      S  (S)ingle  _____(H)ead of Household
Personal Allowances:     1       Itemized Deductions:_______
Addl Fed Tax Withholding: (leave blank)_________    Addl Fed Nonres Alien Tax _________

(EALN)  For non-U.S. citizens only.  Refer to payroll instructions.
Country Code: ______  Visa Type: ______  Visa/Work Permit End Date: _____________
(F1: see line 5 on I-20; J1: see line 3 of DS-2019)

(EAPC)
APPOINTMENT:
Type: 5   Basis 09  Pd Ovr 09  Begin Date 1001XX  End Date 1231XX  Dept Code 000326
Title Code 2850  %Full 0.25  F/V  Ann/Hr Rate X.XXXX  Rt H  Sch BW  Time A  Lv N
DISTRIBUTION:
Index (your index)  Sub 2  Dist % 0.2500  Beg Date 1001XX  End Date 1231XX  Step Amount X.XXXX  Dos REG

(EPER)
BELI 5  Effective Date: 1001XX
Date of Hire: 1001XX  Original Date of Hire 1001XX
Employee Relations Code:  E  Employee Relations Unit:  BX
NOTE: System will automatically populate if “E” is ERC code
Home Dept Code: (must be Grad’s academic dept code) _______  Timekeeper Code: 000365_00
College Code: 00

Comments:  ______________________ RDR 2850, 25%, Fall Qtr
______________________________
GRADUATE STUDENT NEW HIRE DATA COLLECTION WORKSHEET  
(For Completion of Mandatory Fields)  
SAMPLE READER (2850) at MONTHLY RATE

(EEID)
Social Security Number 123456789
Jonathan Richard Sampleton  
First Name Middle Last Name Suffix (Jr./Sr)
Date of Birth: 031471

(EPD1)
Sex: M (M or F)
Hispanic: ____
American Indian or Alaska Native: ___  Asian: ___  Black/African American: ___
Native Hawaiian or Other Pacific Islander: ___  White: ___
Primary Ethnic/Race: ____ (see page 5-8)
Disabled Status: _____ (see page 5-8)
Veteran Status Codes – Vietnam: ____ War/Campaign: ____ Oth Status: _____ Serv Medal: _____
(N or V) (N or E = Veteran) (see page 5-8)
Recently Separated Veteran Date: ______
Citizenship: _____  
(C = Citizen, R = Resident Alien, N = Non-Resident Alien, A= Canada, Mexico, S. Korea, S = India)
Student Status: 4 (Grad) No. of Reg. Units: ____ (leave blank)
Stu/Reg: ____ (leave blank)

(EPD2)
Oath Signature Date: 1001XX  NOTE: The oath must be signed by the first day of the quarter.
I9 Date: 1001XX  NOTE: Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.

(ETAX) Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.
Federal: Marital Status: (M)arried  $ (S)ingle  Personal Allowances: 1
State: Marital Status: (M)arried  $ (S)ingle  (H)ead of Household
Personal Allowances: 1  Itemized Deductions:_______

(EALN) For non-U.S. citizens only. Refer to payroll instructions.
Country Code: ______ Visa Type: _____ Visa/Work Permit End Date: ___________ US Date of Entry ___________
(F1: see line 5 on I-20; J1: see line 3 of DS-2019)
APPOINTMENT:

- Type: 5
- Basis: 09 Pd Ovr 09
- Begin Date: 1001XX
- End Date: 1231XX
- Dur: (blank)
- Dept Code: 000326

Title Code: 2850
- %Full: 0.25
- F/V: V
- Ann/Hr Rate: (leave blank)
- Rt: A
- Sch: MO
- Time: A
- Lv: N

DISTRIBUTION:

- Index: (your index)
- Sub: 2
- Dist %: 0.2500
- Beg Date: 1001XX
- End Date: 1231XX
- Step: __
- Amount: XXXX.XX
- Dos: REG

(BELI)

- Effective Date: 1001XX

Date of Hire: 1001XX
- Original Date of Hire: 1001XX

Employee Relations Code: E
- Employee Relations Unit: BX

HOME DEPT CODE: (must be Grad’s academic dept code)

Timekeeper Code: 000365 00

College Code: 00

Comments:

- RDR 2850, 25%, Fall Qtr

(NOTE: Pay at monthly rate if the student has another appointment at monthly rate).

TUTOR – TITLE CODE 2860

A Tutor provides tutoring to individual (one-on-one) or small groups (three or more) of undergraduate or graduate students who require additional help to understand a course or topical material. In some instances, tutoring may focus on improved use of the English language.

The Tutor title is approved for use in specific programs including: Academic Enrichment Program, ECE, Economics, GPS, Graduate Enrichment, Honors Achievement Workshop, Humanities, IDEA Student Center, Linguistics, MAE, Medical School Tutorial Program, MESA Engineering, Nanoengineering, OASIS, Physics, Subject A, Teaching and Learning Commons, Theatre, and the Writing Center. Any other department or program use of the Tutor title must have prior written approval by the Dean of Graduate Division.

Graduate student Tutors can be paid at either the Single Session rate (one-on-one tutoring) or at the Group Session rate (three or more in the group receiving the tutoring). This title can be used for programs previously approved by the Graduate Division. Tutors are always set up on sub-2.

TUTORS APPOINTED AT 25% TIME OR MORE RECEIVE TAHI/TAFE

Effective fall quarter 2011, GSHIP, Tuition and Student Services fee payments will be issued for Tutors (25% minimum) at the beginning of the quarter based upon the assumption that the student will work the minimum number of hours required for fee remission (110 hours). Note that fee remission will not be paid at the start of the quarter if the student has a registration or financial “hold” placed on his account because the student is in arrears from a previous quarter.

If the student does not work the required number of hours by the end of the quarter, the fee payments will be rescinded and the amount must be repaid either by the student or by the department through block grant fee scholarship.

The academic home department should report Tutors (25% minimum) to the Graduate Division in a manner similar to reporting a 25% TA. If a department reports hiring a 25% Tutor, the department must ensure that the student is time reported for at least 110 hours in the payroll timekeeping system. Departments are responsible for auditing tutor hours to ensure eligibility.

The hiring department must coordinate the fee payment request with the student’s home department at the time pre-approval for employment is requested. Home departments are responsible for submitting fee payment requests for all their students regardless of where the students are employed on campus.

Timely fee payment submission and PPS time reporting is mandatory in accordance with the ASE-UAW contract and university policy.
Payroll on-line entries are:

**APPOINTMENT LINE**
Type  5  
Basis  09  
Pd Ovr  09  
Appt Begin  See Below  
Appt End  See Below  
Dept  Funding source 6-digit dept. code number  
Title  2860  
% Full  Example, 0.25  
F/V  V (Variable, subject to time reporting on PTR)  
Annual  Use hourly rate if paid hourly, annual if paid monthly  
Rt  H if Hourly, A if Annual  
Sch  BW if bi-weekly/hourly, and MO is monthly  
Time  A (to generate Payroll Time Record)  
Lv  N (No Leave Accrual)  

**DISTRIBUTION LINE**
Index  your index  
SUB  2  
Dist %  Example, 0.2500  
Pay Begin  1001XX  
Pay End  1231XX  
Rate/Amount  X.XXX (Hourly) or XXXX.XX (Monthly) - Refer to salary chart.  
DOS  REG  

**Appointment Begin and End Dates**
Tutor begin and end dates can vary. Some Tutor appointments are set up for the actual quarter dates and others are set up for the Fall quarter begin date through 12/31, Winter from 1/1 - 3/31 and Spring from 4/1 – 6/30. When using a 10/01 start date for a new hire tutor, the oath must be signed on or before the first day of the quarter (not the pay period). For example, if fall quarter begins on 9/22, the oath must be signed by that date, not on 10/1 which is the pay period start date.  

**NOTE:** If the student is already set up as a Teaching Assistant and you are adding a concurrent Tutor appointment, you must add the Tutor at a monthly rate.
GRADUATE STUDENT NEW HIRE DATA COLLECTION WORKSHEET
(For Completion of Mandatory Fields)
SAMPLE TUTOR (2860) at HOURLY RATE

(EEID)
Social Security Number       123456789
Jonathan Richard Sampleton   _____
First Name                   Middle      Last Name            Suffix (Jr./Sr)
Date of Birth:       031471

(EPD1)
Sex: M____(M or F)
Hispanic: _____
American Indian or Alaska Native:    ___ Asian: ___ Black/African American: ___
Native Hawaiian or Other Pacific Islander:    ___ White: ___
Primary Ethnic/Race: ____ (see page 5-8)
Disabled Status: _____ (see page 5-8)
Veteran Status Codes – Vietnam: ______ War/Campaign: ______ Oth Status: ______ Serv Medal: ______
Recently Separated Veteran Date: ______
Citizenship: _____
(C = Citizen, R = Resident Alien, N = Non-Resident Alien, A= Canada, Mexico, S. Korea, S = India)
Student Status: 4 (Grad) No. of Reg. Units: ____ (leave blank)
Stu/Reg: ____ (leave blank)

(EPD2)
Oath Signature Date: 0101XX NOTE: The oath must be signed by the first day of the quarter.
I9 Date: 0101XX NOTE: Employees must complete and sign Section 1 of Form I-9 no later than
the first day of employment, but not before accepting a job offer.

(EADR)
Permanent Address       Line 1: (only use for P.O. Box, route number or c/o line)________________________
Important to keep current. Line 2: 215 Main Street
City: San Diego_________ State CA__________ Zip: 92014____
Home Phone: _______________________
Campus Release Codes – Perm Address: ____ Home Phone: _____ Spouse Name: _____
For all of the above: Blank = No (do not release information), Y= Yes (release information) , N=No
Employee Organization Disclosures – Perm Address: _____ Home Phone: _____
For all of the above: Blank = Yes (release information) , N= No, Y= Yes
(EADR) continued
Mail Code: 0139 (This is where the paycheck, direct deposit pay stub, and W2 form are sent).

(ETAX) Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.

Federal: Marital Status: (M)arried (S)ingle Personal Allowances: 1
State: Marital Status: (M)arried (S)ingle (H)ead of Household
Personal Allowances: 1 Itemized Deductions:
Addl Fed Tax Withholding: (leave blank) Addl Fed Nonres Alien Tax:

(EALN) For non-U.S. citizens only. Refer to payroll instructions.

Country Code: Visa Type: Visa/Work Permit End Date: US Date of Entry
(F1: see line 5 on I-20; J1: see line 3 of DS-2019)

(EAPC)

APPOINTMENT:

Type: 5 Basis 09 Pd Ovr 09 Begin Date 0101XX End Date 0331XX Dept Code 000326
Title Code 2860 %Full 0.15 F/V Ann/Hr Rate XX.XXXX Rt H Sch BW Time A Lv N

DISTRIBUTION:

Index (your index) Sub 2 Dist % 0.1500 Beg Date 0101XX End Date 0331XX Step__Amount XX.XXXX Dos REG

(EPER)

BELI 5 Effective Date: 0101XX

Date of Hire: 0101XX Original Date of Hire 0101XX
Employee Relations Code: E Employee Relations Unit: BX
NOTE: System will automatically populate if “E” is ERC code
Home Dept Code: (must be Grad’s academic dept code) Timekeeper Code: 000365 00
College Code: 00

Comments: Tutor for Graduate Enrichment Program - Payment Not to Exceed $350.00
GRADUATE STUDENT NEW HIRE DATA COLLECTION WORKSHEET
(For Completion of Mandatory Fields)
SAMPLE TUTOR (2860) at MONTHLY RATE

<table>
<thead>
<tr>
<th>Social Security Number</th>
<th>123456789</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Jonathan</td>
</tr>
<tr>
<td>Middle</td>
<td>Richard</td>
</tr>
<tr>
<td>Last Name</td>
<td>Sampleton</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>031471</td>
</tr>
</tbody>
</table>

Sex: M ____ (M or F)
Hispanic: ____
American Indian or Alaska Native: ____ Asian: ____ Black/African American: ____
Native Hawaiian or Other Pacific Islander: ____ White: ____
Primary Ethnic/Race: ____ (see page 5-8)
Disabled Status: ____ (see page 5-8)
Veteran Status Codes – Vietnam: ____ War/Campaign: ____ Oth Status: ____ Serv Medal: ____
Recently Separated Veteran Date: ____
Citizenship: ____
(C = Citizen, R = Resident Alien, N = Non-Resident Alien, A = Canada, Mexico, S. Korea, S = India)
Student Status: 4 (Grad) No. of Reg. Units: ____ (leave blank)
Stu/Reg: ____ (leave blank)

Oath Signature Date: 0101XX NOTE: The oath must be signed by the first day of the quarter.
I9 Date: 0101XX NOTE: Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.

Permanent Address Line 1: (only use for P.O. Box, route number or c/o line)
Important to keep current. Line 2: 215 Main Street
City: San Diego State CA Zip: 92014
Home Phone: __________________________
Campus Release Codes – Perm Address: ____ Home Phone: ____ Spouse Name: ____
For all of the above: Blank = No (do not release information), Y= Yes (release information) , N=No
Employee Organization Disclosures – Perm Address: ____ Home Phone: ____
For all of the above: Blank = Yes (release information) , N= No, Y= Yes
Mail Code: 0139 ____(This is where the paycheck, direct deposit pay stub, and W2 form are sent).
**ETAX** Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.

- **Federal**: Marital Status: _____(M)arried  ☐ (S)ingle  
  Personal Allowances:  1
- **State**: Marital Status: _____(M)arried  ☐ (S)ingle  ☐ (H)ead of Household 
  Personal Allowances:  1  
  Itemized Deductions:______
- **Addl Fed Tax Withholding**: (leave blank for “N”) _______  
  **Addl Fed Nonres Alien Tax**: _______

**EALN** For non-U.S. citizens only. Refer to payroll instructions.

- **Country Code**: _______  
  **Visa Type**: _______  
  **Visa/Work Permit End Date**: ____________________
  (F1: see line 5 on I-20; J1: see line 3 of DS-2019)

**EAPC**

**APPOINTMENT**:

- **Type**: 5  
  **Basis**: 09 Pd Ovr 09  
  **Begin Date**: 0101XX  
  **End Date**: 0331XX  
  **Dur**: (blank)  
  **Dept Code**: 000326
- **Title Code**: 2860 %  
  **Full**: 0.15  
  **F/V**: V  
  **Ann/Hr Rate**: (leave blank)  
  **Rt**: A  
  **Sch**: MO  
  **Time**: A  
  **Lv**: N

**DISTRIBUTION**:

- **Index**: (your index)  
  **Sub**: 2  
  **Dist %**: 0.1500  
  **Beg Date**: 0101XX  
  **End Date**: 0331XX  
  **Step**:____
- **Amount**: XXXX.XX  
  **Dos**: REG

**EPER**

**BELI** 5  
**Effective Date**: 010196

- **Date of Hire**: 0101XX  
  **Original Date of Hire**: 0101XX
- **Employee Relations Code**: E  
  **Employee Relations Unit**: BX
  **NOTE**: System will automatically populate if “E” is ERC code
- **Home Dept Code**: (must be Grad’s academic dept code) _______  
  **Timekeeper Code**: 000365 00
- **College Code**: 00

**Comments**: Tutor for Graduate Enrichment Program - Payment Not to Exceed $350.00

  (NOTE: Pay at monthly rate if the student has another appointment at monthly rate).
14. Guide for Nonresident International Student Fellowship Stipends (F-1/J-1 visas)

RESEARCH FELLOW – TITLE CODE 3296

The Research Fellow title is used for nonresident international students receiving fellowship stipend payments. Prior to processing the stipend payment, the department must submit a stipend request through the online financial support tool. The department must simultaneously enter stipend payment information into the payroll system in order for the Disbursements Division to issue a stipend check. Special processing is required for retroactive actions (see below).

NOTE: U.S. citizen, permanent resident, and resident alien stipend payments are administered by the Graduate Division through the Student Aid Management System (SAM). In general, an international student will become a resident alien for **U.S. tax purposes only** in their sixth year in the U.S.
If you have questions as to whether a student is a resident alien, please contact Paul Rodriguez, x43241, in the Payroll office.

A student can be set up for one fiscal year (through 6/30) at a time. Extensions beyond 6/30 may be done in the month of May.

TIN – Tax Identification Number

In October 2004, the Social Security Administration (SSA) revised their document requirements for international students on F-1 and J-1 status.

In the case of the F-1 student, the student must have a written offer of employment in order to apply for a Social Security number (SSN).

Incoming international students on F-1 visas who 1) **do not** have an offer of employment, and 2) **do** have fellowship support (which must be paid through PPS on title code 3296), must obtain an ITIN.

The ITIN Application Procedure can be found at the following website: [http://ispo.ucsd.edu/current-students/f-1-students/itin-info.html](http://ispo.ucsd.edu/current-students/f-1-students/itin-info.html)

*No tax treaty:*

If the Nonresident Alien (NRA) is subject to the 14% federal tax withholding, the IRS W-7 form must be filed along with the 1040NR (or 1040NR-EZ) tax return during the next regular tax filing season.

For PPS input on title code 3296, the department must enter all nines in the SSN field or all zeroes if you are using the web-based PPS system. Upon update in PPS, the number will be displayed as all zeroes.
Once a Taxpayer Identification number (TIN) number is obtained, the individual must report it to their department for input into the system. In addition, please notify Kathryn Murphy of the new TIN (or SSN) in order for her to request that Disbursements update IFIS with the new information.

**Tax treaty:**
If the NRA is eligible for a tax treaty exemption, the IRS W-7 form must be filed as soon as possible in the hope of quickly receiving a TIN.

At the latest, the TIN must be received in sufficient time for year-end reporting.

The treaty will not be granted until a number is obtained, per IRS regulations. The payee will experience federal taxation until a valid number is obtained and updated in PPS. Payroll will be able to make retroactive refunds during the year on any taxes withheld.

Again, once a Taxpayer Identification number (TIN) number is obtained, the individual must report it to their department for input into the system. In addition, please notify Kathryn Murphy of the new TIN (or SSN) in order for her to request that Disbursements update IFIS with the new information.

Please ensure that your incoming NRA graduate students (who are not currently eligible to apply for a SSN) are made aware that they must submit an IRS W-7 form in accordance with the IRS guidelines.

Finally, if/when the NRA is offered employment, the student must apply for a SSN. A SSN will always have priority over any other number. Please ensure that NRA fellowship recipients who eventually become employees (e.g., GSR) apply for a SSN when the time comes.

**Retroactive Actions (input after the monthly PPS entry deadline)**

**Retroactive** changes made in payroll (PPS) to title code 3296 stipend payments will not automatically flow through to Disbursements and special processing must take place.

Below are the following steps to take if you need to make a retroactive change to the fund source and/or dollar amount of a payment made on title code 3296:

1) In all cases, please provide the Graduate Division with updated information on the Graduate Division Online Support Tool ([https://goapp.ucsd.edu/financial/](https://goapp.ucsd.edu/financial/)).

2) See below:

**Change to fund source only:** make correction to original appointment in PPS. Notify departmental fund manager of relevant information in order for he/she to journal expense from old fund source to new fund source. (Note: the Graduate Division is the fund manager for all GSRXXXX index numbers.)
Change to dollar amount (increase): increase/add current month appointment in PPS. For example, if you need to pay the student an additional $100.00 for the month of February, leave the February appointment as is, and increase the March appointment by $100.00. If you make a retroactive change to the February appointment, the change will not flow through to Disbursements and the student will not be paid the additional funds.

Change to dollar amount (decrease): if the student has a current appointment in PPS, decrease the current appointment to reflect the correct amount. For example, if you need to decrease the student's February stipend by $100.00, leave the February appointment as is, and decrease the March appointment by $100.00. The student's March check will then reflect the adjustment for February.

If the student does not have a current appointment in PPS, correct the original appointment in PPS and manually bill the student for the amount owed (net stipend payment). For example, if the student was over-paid by $100.00 for the month of February, but has no March (or current fiscal year) appointment to adjust, correct the February appointment in PPS, and notify the student of the amount owed (net stipend).

3) Do not send a Payroll Expense Transfer (PET) to Payroll; a PET for a 3296 appointment will be rejected by Payroll and returned to the department.

Direct Deposit Information
If the international student has a current PPS appointment (GSR, TA, etc.), the stipend payment will be issued according to the Surepay/Wage Disposition information in PPS.

If the student does not have a current PPS appointment (at the time the 3296 appointment is established in PPS), the stipend payment will be issued according to the Disbursements Direct Deposit Form.

To be safe, the student may want to sign up for both:

Payroll:
http://blink.ucsd.edu/Blink/External/Topics/How_To/0,1260,4306,00.html

Disbursements:
http://blink.ucsd.edu/buy-pay/payment-methods/direct-deposit/enroll.html

How to Verify if a Check Has Been Issued
Log in to Integrated Financial Information System (IFIS).
(S)elect AP (F9)
(S)elect CHKMENU (F12)
(S)elect CHKRLST (SHIFT-F2)
“Payee” field: enter payroll employee ID number

APRVD AMT = Gross stipend amount
NUMBER (heading to the right of APRVD AMT) = If the field starts with “A”, it is an automatic direct deposit check, otherwise hard copy
CHECK DATE = date stipend payment was issued
AMOUNT = Net amount after any federal tax withholding

Tax Information

Federal tax – in the absence of a tax treaty, a flat tax of 14% will be withheld.

State tax – no California state tax will be withheld. The University is not required to withhold state taxes from stipend payments, although the student may continue to have a state tax liability. It is the student’s responsibility to determine this liability, if any.

Tax reporting – a year-end 1042-S form (instead of a W-2 Wage and Tax Statement) will be issued by the Payroll Office to each foreign student whose stipend payment is processed through Disbursements.

Additional tax information for students is available at:
http://grad.ucsd.edu/resources/general/tax.html
Nonresident International Student Fellowship Stipend (F-1/J-1 Visa)

Payroll online entries are:

**APPOINTMENT LINE**
- **Type**: 5
- **Basis**: Leave blank
- **Pd Ovr**: Leave blank
- **Appt Begin**: Begin date
- **Appt End**: End date
- **Dept**: Funding source 6-digit dept. code number
- **Title**: 3296
- **% Full**: Leave Blank
- **F/V**: F (Fixed)
- **Annual**: Leave blank
- **Rate**: A
- **Sch**: MO (Monthly)
- **Time**: N (No Time Sheet)
- **Lv**: N (No Leave Accrual)

**DISTRIBUTION LINE**
- **Index**: your index
- **Sub**: 2
- **Dist %**: Leave blank
- **Pay Begin**: Begin date
- **Pay End**: End date
- **Rate/Amount**: XXXX.XX (monthly stipend amount)
- **DOS**: RPX

NOTE: The Description of Service (DOS) code is “RPX”.

The sub is 2.

Do not enter appointment or distribution percent time.
Social Security Number 123-45-6789

First Name  John     Middle Name  Richard     Last Name  Sampleton     Suffix (Jr./Sr.)

Date of Birth: 03/14/71

Sex: M____(M or F)

Hispanic: ___

American Indian or Alaska Native: ___  Asian: ___  Black/African American: ___

Native Hawaiian or Other Pacific Islander: ___  White: ___

Primary Ethnic/Race: ____ (see page 5-8)

Disabled Status: _____ (see page 5-8)

Veteran Status Codes – Vietnam: ______  War/Campaign: ______  Oth Status: ______  Serv Medal: ______

(N or V)  (N or E = Veteran) (see page 5-8)

Recently Separated Veteran Date: ______

Citizenship: _____

(C = Citizen, R = Resident Alien, N = Non-Resident Alien, A= Canada, Mexico, S. Korea, S = India)

Student Status: 4 (Grad)  No. of Reg. Units: ____ (leave blank)

Stu/Reg: ____ (leave blank)

Oath Signature Date: ______ (leave blank for Permanent Residents and International Students)

I-9 Date: 10/01/XX  NOTE: Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.

Permanent Address

Line 1: (only use for P.O. Box, route number or c/o line)

Important to keep current. Line 2: 215 Main Street

City: San Diego  State: CA  Zip: 92014

Home Phone: __________________________

(EADR) continued
Campus Release Codes – Perm Address: _____ Home Phone: _____ Spouse Name: _____
For all of the above: Blank = No (do not release information), Y= Yes (release information), N= No
Employee Organization Disclosures – Perm Address: _____ Home Phone: _____
For all of the above: Blank = Yes (release information), N= No, Y= Yes
Mail Code: 0139____ (This is where the paycheck, direct deposit pay stub, and W2 form are sent).

(ETAX) Refer to payroll instructions for a non-resident alien and student’s completed W-4 Form.
Federal: Marital Status: _____(M)arried _____S (S)ingle Personal Allowances: 1
State: Marital Status: _____(M)arried _____S (S)ingle _____(H)ead of Household
Personal Allowances: 1 Itemized Deductions:_______
Addl Fed Tax Withholding: (leave blank)__________ Addl Fed Nonres Alien Tax:__________

(EALN) For non-U.S. citizens only. Refer to payroll instructions.
Country Code: _____ Visa Type: _____ Visa/Work Permit End Date: _________ US Date of Entry_________
(F1: see line 5 on I-20; J1: see line 3 of DS-2019)

(EAPC) 
APPOINTMENT:
Type: 5 Basis (blank) Pd Ovr (blank) Begin Date 1001XX End Date 0630XX Dur: (blank) Dept Code 000326
Title Code 3296 %Full (blank) F/V F Ann/Hr Rate (blank) Rt A Sch MO Time N Lv N
DISTRIBUTION:
Index (your index) Sub 2 Dist % (blank) Beg Date 1001XX End Date 0630XX Step__Amt 1000.0 Dos RPX

(EPER)
BELI 5 Effective Date: 1001XX
Date of Hire: 1001XX Original Date of Hire: 1001XX
Employee Relations Code: F Employee Relations Unit: 99
NOTE: System will automatically populate if “E” is ERC code
Home Dept Code: (must be Grad’s academic dept code) ________ Timekeeper Code:___________
College Code: 00

Comments: Fellowship stipend for International student. Nine payments @ 1000.00/month.
15. Medical Student and PharmD Appointments

Occasionally, medical students and PharmD students are appointed on graduate student academic titles (except that they may not be appointed as Graduate Student Researchers) or hired as staff-titled student employees.

Departments appointing medical students or PharmD students on casual-restricted student titles must follow normal procedures for these appointments as provided in the Job Opportunities Program (x40153) instructions. Questions regarding the appointment of medical students on academic titles can be referred to the Graduate Division (x43727).

In addition, departments must follow any pre-approval procedures as established by the School of Medicine, Dean of Academic Affairs (x47893) and the School of Medicine, Financial Aid Office, (x44664).

For medical students, the completion of the action online in the Payroll system will be similar to that of graduate students, except that the “college code” will be “85” rather than “00”.

16. Appointment of Non-Student Tutors and Readers

PRE-APPROVAL PROCESS

Campus policy is that registered students in good standing should be offered all available positions as Teaching Assistants, Readers or Tutors. It is an exception to appoint a non-student to perform these services and requires pre-approval by the Dean of the Graduate Division.

Prior to the appointment, departments should follow these procedures:

1. A department/program must make a thorough search to determine that there is no student available for the position. This can be done through ASES or e-mail distributed to other departments advertising the position, or by phone calls to department graduate coordinators.

2. If it is determined that there are no qualified students available, a request for exception to hire a non-student must be submitted to the Dean of the Graduate Division.

   The letter should state the reasons for the request, describe the type of search made to find a student, and list the departments contacted.

   The biography form for non-student tutor and reader appointments must be completed and submitted with the exception letter. You may use a copy of the form located on the last page of this section.

3. Once the department receives notification of the Dean’s approval, it may proceed with the online payroll action.

NOTE: If you want to hire a non-student Tutor/Reader who is not a U.S. citizen or permanent resident, you must first determine that they have a valid work permit before you submit the exception letter and one-page Biography form to the Graduate Division.

For assistance with international non-student work permit questions, contact the International Center.

NON-STUDENT READER AND TUTOR (SERVING AS A COURSE ASSISTANT) DEFINITIONS

- The non-student Reader definition is the same as that for a registered graduate or undergraduate student.

- The non-student tutor (serving as a course assistant) can be appointed under the same definition as a graduate teaching assistant or undergraduate tutor (serving a Teaching Apprenticeship).
• A non-student tutor, if working in one of the specific programs approved for the tutor title (such as Physics or the Medical School Tutorial Program) can also have the duties of a graduate or undergraduate tutor.

PAY RATE
• Refer to the Student Academic Title Rates chart published by the Graduate Division.
• A non-student who has received the baccalaureate degree is paid at the appropriate graduate student pay rate.
• A non-student who does not hold the baccalaureate degree is paid at the appropriate undergraduate student pay rate.

PPS ONLINE ENTRY
In general, a department/program setting up a non-student appointed as a reader or tutor (serving as a Course Assistant) can follow the graduate student instructions except for the following differences:

1. Title Codes (EAPC screen)
   2500 = Non-student Reader (use sub-2), BW
   2510 = Non-student Tutor (serving as a Course Assistant, use sub-0), MO

Exception: If the employee has a concurrent bi-weekly staff or faculty appointment that cannot be changed, then the Non-student Tutor must be set up BW using the Group Tutor hourly rate.

2. Student Status (EPDI screen)
   “1”, Not registered

3. Benefits Eligibility Level, BELI, (EPER screen)
   Refer to the Benefit Guidelines in the reference Manual. Most non-students are either coded “4” (total percent of all appointments is 43.75% or more) or “5” (total percent of all appointments is less than 43.75%).

Procedures After Exception is Approved
Review the 1,000 Hour Policy Employee Information on page 16-5 to understand policy.

Submit to the Graduate Division the non-student exception letter + non-student Biography Form (a new Bio form is required each fiscal year or whenever information changes).
When the exception is approved, prepare the Appointment Notification Letter indicating the correct benefits eligibility (if rehire or continuous employment, see below).

**New Hire (PPS entries)**

1. Besides the other required “New Hire” documents, have the employee complete the Benefits Eligibility Level Indicator (BELI) – UPAY 726 – Employee needs to sign form.

2. The Home Department (EPER screen) should reflect the funding source.

**Rehire (PPS Entries)**

1. As needed, contact the Graduate Division to change the Home Department (EPER) to your department or program.

2. Check the IGEN, IHR2, and IINS screens to determine proper Benefits Eligibility Indicator (BELI). Contact the Graduate Division for assistance as needed. Complete normal “Rehire” documents. The employee must sign the BELI Form (UPAY 726).

**Continuation of Employment (EAPC Screen)**

1. If you are not the only funding source, coordinate employment and Benefits Eligibility with the offer funding source, and have them add you in as an “Alternate Department” to gain access to the record. Contact the Graduate Division for assistance as needed.

2. If the Benefits Eligibility is changing, have the employee sign a new BELI Form.

**Separation (SEPR Bundle)**

**ESEP Screen:** For non-students with a BELI Code of 1, 3, or 4, it is important to separate a non-student employee when the appointment has ended (and will not be extended) to avoid additional monthly benefit charges being erroneously charged to the funding source.

**EADR Screen:** Update the address since this is where the W-2, Statement of Earnings will be mailed to non-active employees.

Defined Contribution Plan (DCP) Distribution: If the employee had a DCP deduction, remind the employee to use [http://atyourservice.ucop.edu](http://atyourservice.ucop.edu) to elect a plan rollover, distribution, etc.

BELI 1 or 3: If the employee had medical, dental, and/or vision, give the employee the COBRA forms, UBEN 102-Cobra/Continuation Election and 1500-Continuation of Group Insurance Coverage.

Unemployment: Since the non-student is appointed for a specific period of time (i.e., academic quarter or academic year), the employee is generally not eligible for unemployment benefits following the term of appointment.
Benefits Eligibility Level Indicator, BELI (EPER Screen)

Refer to “How to Determine Eligibility for Benefits” at http://blink.ucsd.edu/finance/payroll/processes/eligibility.html#1.-Determine-the-employee%27s-BELI. The BELI form should be completed and signed by the employee and retained by the department. It is not sent to Payroll or the Benefits Office.

Full Benefits (BELI = 1):
50% time for a year (12 months) or more. To maintain eligibility, employee must maintain an average regular paid time of at least 17.5 hours per week (43.75% time).

Mid-level Benefits (BELI = 3):
100% time for at least three months. To maintain eligibility, employee must maintain an average regular paid time of at least 17.5 hours per week (43.75%).

Core Benefits (BELI = 4):
Appointed at least 43.75% and average regular paid time is at least 17.5 hours a week.

No Health or Welfare Benefits (BELI = 5):
Less than 43.75% time and average regular paid time is less than 17.5 hours a week.

If the employee is eligible for Full Benefits (BELI 1), Mid-level Benefits (BELI 3) or Core Benefits (BELI 4), give the person the appropriate Benefits information. For BELI 1 and 3, let the employee know that enrollment in the health and welfare plans must occur during the 31-day period of initial eligibility (PIE), which starts when first eligible for benefits. Contact the Graduate Division for assistance as needed.

Benefits Meeting: Orientations take place each Monday from 10:30 am - 12:30 pm. (if Monday is a holiday, the orientation is held on Tuesday).
The schedule and location may be found at: http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,2605,00.html

If you are unable to attend, you may watch the online video orientation which allows you to skip to specific benefit areas: http://atyourservice.ucop.edu/employees/new_employee/index.html
Scroll down and click on: “Watch the new employee benefits video.”

1,000 HOUR POLICY FOR NON-STUDENT TUTORS (#2510) AND READERS (#2500)

Effective January 1, 2001, an employee appointed as a non-student Tutor or Reader (and most other non-student academic and staff titles) will become a University of California Retirement Program (UCRP) member after accumulating 1,000 hours on pay status during a rolling 12-month period (with no break-in-service exceeding 120 days). Once the employee reaches 1000 hours they become eligible for full benefits (BELI = 1).
The hiring department should update the assigned BELI code to “1” in PPS once the employee reaches 1000 hours.

In addition, the employee must enroll in the health and welfare plans by completing the UPAY 850 form http://ucnet.universityofcalifornia.edu/forms/pdf/upay-850.pdf during their 31-day period of initial eligibility (PIE), which starts when they become eligible for benefits. (For an employee paid monthly, the PIE starts the first day of the month after the employee reaches 1,000 hours on pay status.) If they fail to enroll during their PIE, they will be defaulted into single-party coverage for Core Medical, Delta Dental, and the Vision Service Plan.

**Important:** Employees must maintain an average regular paid time of at least 17.5 hours per week (43.75% or more), and remain in an eligible appointment, for continued eligibility at this benefit level.

More information about benefits can be found under Group Insurance Plans at: http://ucnet.universityofcalifornia.edu/index.html.
This form must be submitted with the exception request and approved before employment begins

**Personal Data**

Name: 

Last     First     Middle

Home Address
Street
Phone: 

City, State, Zip
E-mail

Date of Birth:     Sex: M     F

Are you a citizen or permanent resident of the U.S.? U. S. Citizen     Permanent Resident
If not, what type of visa do you have? Work permit end date:

Person to be contacted in case of emergency:
Name
Street
Phone: 

City, State, Zip
Email:

**Education**

If you attended UCSD, give last quarter of registration and date of degree: 

STOP : If you are a registered UCSD student, you are not be eligible for this non-student employment. Contact the department immediately to discuss your situation. If the person indicates this exception can still be submitted for approval, provide their name:

<table>
<thead>
<tr>
<th>Institution of highest degree</th>
<th>Location of the Institution</th>
<th>Degrees or Certificates</th>
<th>Dates of Attendance</th>
<th>Subject or Field</th>
<th>Date Received</th>
</tr>
</thead>
</table>

Signature     Date
17. Visiting Graduate Students (VGS) – Non-UC

A VGS is a pre-doctoral graduate student (PhD, MA, MS, MBA, or MD) pursuing research at UC San Diego related to their degree program at their home institution. The VGS must be enrolled in a degree granting program or equivalent at an institution of higher education other than the University of California and be physically present at UC San Diego for the duration of the appointment. The UC appointment must serve an academic purpose for the unit in which they are visiting. (See Full Policy).

I. TITLES AND APPOINTMENT CRITERIA:

A. Non-Salaried Visiting Graduate Student - Visitor Graduate (WOS) Title Code 3730

A non-salaried VGS receives financial support for their visit from their home institution (grant, fellowship/scholarship) or personal funds. See “Compensation” below for support level requirements.

A non-salaried VGS does not receive financial support from their UCSD faculty sponsor.

NOTE: Non-salaried Visiting Graduate Students are NOT to be entered into PPS at this time.

B. Salaried Visiting Graduate Student - Junior Specialist Title Code 3329

A salaried VGS may receive partial or full support from their UCSD faculty sponsor via the Junior Specialist Title. Approval for this title must be requested in advance by submitting an appointment to the Graduate Division. See “Compensation” below for support level requirements.

For data entry guidelines, please see http://grad.ucsd.edu/_files/financial/PPS/visitinggrad.pdf.

C. Terms of Service

VGS should normally be appointed for periods of no less than three months and may be appointed up to one year at a time. Appointments may be extended up to an additional year with a break in service for a total of two years maximum with appropriate justification. Note that students with support extending beyond one year may be considered for an initial appointment of 2 years maximum. In this scenario, a letter from the Faculty Sponsor citing exceptional circumstances must be submitted with the application.

II. COMPENSATION:

All VGS engaged in research activities at UCSD, and appointed for six months or less, must have financial support that meets the J1 visa requirement of $2400 per month. All VGS appointed for more than six months must have financial support comparable to that available to UCSD graduate students enrolled in similar disciplinary programs for the duration of
their appointment. The source of support may come from their home institution (fellowship/scholarship or grant), personal funds, and/or salary from UCSD.

Please see the following chart for a list of financial support levels by degree major: VGS Compensation Levels.

Regardless of the source of support, under no circumstances will the appointment of a VGS be approved if the student will receive support less than the minimum requirement for J1 visa holders. Under no circumstances should involvement of a VGS detract from financial support and/or resources that would be otherwise available to registered UCSD graduate students whether domestic or international.

An exception approval is required when a department is requesting a salaried VGS appointment above the amount paid to a registered UCSD graduate student in a comparable department. **NOTE: in all cases the maximum monthly dollar amount for the Junior Specialist title is $3337/mo effective 7/1/16.**

Salaried VGS are eligible for Workers’ Compensation at UCSD if injured in the course and scope of their employment.

Workers Compensation coverage is not provided to a Non-salaried VGS.

**III. VISITING GRADUATE STUDENT PROCESSING FEE:**

Each Visiting Graduate Student (VGS) is required to pay a $100 nonrefundable processing fee. This is a one-time fee that covers a period of stay up to 2 years.

**An additional $100 nonrefundable processing fee will be charged in the following instances:**

1. The period of stay extends beyond 2 years
2. there is a > 30-day break in the appointment period and a new appointment packet is required

There are two options to pay the processing fee: 1) upon arrival at UCSD, the VGS may pay the fee directly at the UCSD Cashier’s Office, or 2) the Sponsoring Department may pay the fee via UCSD recharge. **In all cases,** the Sponsoring Department must supply an index number when submitting the original VGS appointment to the Graduate Division.

The processing fee is due on the 15th of the month following the appointment start date. For example, if the appointment begins October 1, the fee must be paid no later than November 15. If the VGS does not pay the fee by the deadline, the fee will be automatically recharged to the Sponsoring Department. For this reason, it is imperative that Graduate Division is notified of any changes to the appointment period.
IV. APPLICATION PROCEDURE/APPOINTMENT PACKET:

All VGS must have a UCSD faculty sponsor who will host the visit. Prospective VGS should first contact the department chair or faculty with whom they would like to work and request an invitation. The host faculty and/or department are responsible for preparing and submitting the appointment packet three months prior to the visitor's arrival, in addition to preparing for the arrival (arranging for office space, if applicable). **VGS may not enter the lab or university facility without an official approved appointment.**

The appointment submission process for the VGS is through the Visiting Graduate Student Appointment System (VGSAS). VGSAS is an online administrative portal and database.

To request Department Administrator access to VGSAS, an authorized individual (MSO) must send an e-mail to vgcoordinator@ucsd.edu. Once authorized, the Department Administrator will have the authority to assign users and user roles for the Sponsoring Department.

*The link to VGSAS may be found here: https://vgs.ucsd.edu. A user’s manual can be found under the heading Documentation at this link. In addition, if you would like to be added to the Visitinggradstaff listserv, please email vgcoordinator@ucsd.edu.*

The following documents will be required to be uploaded in VGSAS as a condition of the VGS appointment approval process. **All documents must be in submitted in English.**

**Initial Appointment**

1. UC Patent Acknowledgement/Oath*
2. Current Curriculum Vitae
3. Current Proof of Registration (i.e. copy of current transcript or letter from home institution) as a graduate student (PhD, Masters, or MD)
4. Proof of Health Insurance, submit a **copy** of the completed UCSD International Center "Form C: Health Insurance Memorandum of Understanding"
5. *The Patent Acknowledgement Form with original signatures should be submitted. Please note that the Patent Acknowledgement Form may be uploaded through VGSAS in lieu of the original in order to expedite the review process, and under the condition that the original form will be submitted as soon as the visitor arrives. The original form must be submitted no later than 30 days after the appointment begin date to prevent delay/denial of future appointments. For non-salaried appointments, forward the original document complete with VGS and witness signatures to VGS Coordinator at MC 0003. For salaried appointments, forward the original completed document with required new hire paperwork to Payroll at MC 0952.*

For International Visitors: Appointment material should be submitted at least 3 months in advance of the start date, and earlier for international visitors who require a visa. Once the VGS Appointment Form has been approved, the sponsoring department or ORU will submit the appropriate visa paperwork to the International Center at International Center. International students coming on F1-STEM should also note the new F-1 STEM OPT Extension Protocol below.
Upon arrival, an approved visiting graduate student may obtain a UCSD Campus ID Card. Information on how to obtain a UCSD Campus ID Card is available on the Blink web site at [Blink website](http://blink.ucsd.edu/sponsor/exportcontrol/).

**Export Control**

Before agreeing to host a VGS from a foreign country, please review the information from the UCSD Export Control Office. That office can provide further guidance if there is a specific concern. [http://blink.ucsd.edu/sponsor/exportcontrol/](http://blink.ucsd.edu/sponsor/exportcontrol/)

### V. APPOINTMENT EXTENSION:

The appointment extension process for the VGS is through the Visiting Graduate Student Appointment System (VGSAS).

The following document is required when the VGS/Sponsoring Department is requesting an appointment extension:

- **Current** proof of registration and/or transcript from the home institution
- **Exception letter (if applicable)**

**F-1 STEM OPT extension**: New regulations governing the F-1 STEM Optional Practical Training (OPT) extension are in effect as of [May 10th, 2016](http://blink.ucsd.edu/HR/supervising/hiring/staff/f1-stem-opt.html). In order for UC San Diego to either continue to employ or hire new F-1 students during their STEM OPT period, the institution must meet new requirements. Students will be responsible for alerting their departments to their need for STEM extension support, and departments will have to decide to either meet these new requirements or sponsor students in an alternative visa classification that provides work authorization. For more information, see: [http://blink.ucsd.edu/HR/supervising/hiring/staff/f1-stem-opt.html](http://blink.ucsd.edu/HR/supervising/hiring/staff/f1-stem-opt.html)

### VI. HEALTH INSURANCE:

It is required that all VGS have health insurance coverage 24 hours a day, including time spent at UCSD conducting research.

Effective September 1, 2014, this requirement must be met 1) through the UC San Diego Visiting Scholar Benefit Plan offered by Garnett-Powers, 2) through another insurer or 3) be provided by the student’s home country.

To enroll in the Plan offered by Garnett-Powers, visit [http://clients.garnett-powers.com/vs/ucsd/](http://clients.garnett-powers.com/vs/ucsd/) or call toll free 1-888-441-3719. Note: The VGS appointment must be approved by the Graduate Division prior to enrollment in the Plan.

If the VGS has other insurance, certain requirements must be met to waive the UCSD Plan. If the VGS is international with his/her own coverage, that coverage must also meet these standards that meet or exceed the J-1 Visa requirements, as well as provide this same coverage to the student’s
eligible dependents. The minimum levels of coverage that must be offered through the student’s own insurance can be found on Form C at: http://ifso.ucsd.edu/files/ifso/FormC.pdf.

If the student’s insurance meets these requirements, he/she may request a waiver (to decline coverage) for the Plan. Instructions on how to submit a waiver can be found here: http://clients.garnett-powers.com/vs/ucsd/waiver/.

VII. PPS INSTRUCTIONS

IMPORTANT CHANGES AFFECTING JUNIOR SPECIALISTS

The Department of Labor has issued new guidelines, effective December 1, 2016, affecting Junior Specialists. Details can be found at: http://blink.ucsd.edu/go/bwconversion.

To summarize, the federal Fair Labor Standards Act regulates overtime pay and outlines specific criteria for employees to be exempt from overtime. To comply with the revised regulation, UC reclassified certain job titles as nonexempt and eligible for overtime including Junior Specialists.

IMPORTANT: Salaried VGS (Junior Specialists) were converted to bi-weekly pay and will need to begin reporting hours in MyTime starting with the 11/20/16 pay period.

1. Ensure that your salaried VGS are set up with a UCSD email account, which is required for access to MyTime.
2. Once VGS have a ucsd email account, inform your VGS to go to the following link so they may obtain access to UCSD Business Systems. They will need to register here to obtain access to MyTime: http://blink.ucsd.edu/technology/network/access/business-systems/access.html#.
3. Add the Timekeeper Code to PPS on the EPER screen and assign a Supervisor in MyTime for each salaried VGS and notify your Faculty Sponsors/Supervisors of the new requirements for timekeeping.
4. Go over the Timekeeping processes with VGS and Supervisors including reviewing the assigned workload/appointment percentage as well as the policies for working overtime and the need to obtain advance approval for overtime.
5. Enter any new Junior Specialist appointments in PPS with the new title code 3329 starting 11/20/16.

Salaried Visiting Graduate Student – Junior Specialist Title Code 3329 PPS entry:

1. Complete new hire paperwork as outlined in Chapter 5.
2. Complete new hire bundle
   Please note on the EPD1 screen the Student Status should be “1” = not registered
3. Appointment/Distribution:
APPOINTMENT LINE
Type: 5
Basis: 11
Pd Ovr: 12
Appt Begin: See Application
Appt End: See Application
Dur: Blank
F/V: V
Annual rate: 19.18
Rate Code: H
Pay Schedule: BW
Time: A
Dept Funding source: 6-digit dept. code number
% Full: See Application. Percentage is based on approved comparable department support level divided by Jr. Specialist rate, currently $3,337. See VGS Compensation Levels at: http://grad.ucsd.edu/_files/visiting-scholars/VG%20Compensation%20Levels.pdf.
Lv: Enter as applicable. **NOTE:** Leave accrual code “M” reverts back to “D” on 11/20/16. Academic personnel appointed on a fiscal-year basis for 6 months or more at 50 percent time or more accrue vacation leave. Non-student academic appointees accrue sick leave credit provided the appointment is at 50 percent or more time. See APM for further details at:
http://www.ucop.edu/academic-personnel-programs/_files/apm/apm-730.pdf

DISTRIBUTION LINE
Index: Fund source index
Dist %: See application. Percentage is based on approved comparable department support level. See VGS Compensation Levels at: http://grad.ucsd.edu/_files/visiting-scholars/VG%20Compensation%20Levels.pdf.
Pay will the Begin: See appointment
Pay End: See appointment
Sub: 2
Amount: 19.18
Step: 2
DOS code: REG

See example on next page.
BI-WEEKLY JUNIOR SPECIALIST EXAMPLE STARTING 11/20/16

(EAPC) NEW JUNIOR SPECIALIST BI-WEEKLY APPOINTMENT:

Type: ___5___  Basis: 11___Pd Ovr: 12___ Begin Date: 11/20/16  End Date: ___ Dur: (blank)  Hiring Dept Code: ___
(Apt End date)

Title Code: 3329  %Full: ___ F/V: V__Ann: Hr Rate: 19.18___ Rt: H  Sch: BW: Time: A___Lv: M reverts back to D
(varies)

DISTRIBUTION:

Index: MYFUND: Sub: 2: Dist %: _______  Beg Date: 11/20/16  End Date: _______  Step: 2: ___
(varies)                   (Apt End date)

Amount: 19.18__ DOS: REG: ___

(EPER)

BELI: _______  Effective Date: __________________________

Date of Hire: ____________________  Original Date of Hire: ____________________

Home Dept Code: _______  Timekeeper Code: ADD YOUR DEPT CODE

1) BELI Code (EPER Screen): If appointed at 43.75% time or more will qualify for UCSD benefits. See BELI Code Chart for Benefits Eligibility: http://blink.ucsd.edu/finance/payroll/processes/eligibility.html#1.-Determine-the-employee%27s-BEL

Visiting Graduate Students may “Opt Out” of benefits if covered by home institution. Complete the UPAY 850 Form: http://ucnet.universityofcalifornia.edu/forms/pdf/upay-850.pdf

2) SEPARATION GUIDELINES: See Chapter 7. Review APM 730 and 710 for information regarding how to handle terminal vacation and sick time.
18. Retroactive Actions (defined as any action entered after the payroll deadline)

For graduate students, retroactive actions in PPS can occur on Sub-0 (TA/GSR) and Sub-2 (Readers/Tutors).

**ATTN:** Retroactive changes for stipends, 3296 - Research Fellows, require special processing and are not automatically processed through Disbursements. You must refer to Chapter 14, page 2, under “Retroactive Actions” for special instructions.

It is important to understand that the PPS system cannot automatically generate paychecks for retroactive Sub-0 actions and you must follow specific procedures and wording in the "Comments" screen when completing action. This is necessary so that staff in Payroll can easily identify retroactive sub-0 changes and determine whether the action requires a manual pay adjustment.

**Note:** Any retro actions affecting pay will require a separate email to payroll to ensure that a special check is processed.

For sub-2 employees, the On-Line Timekeeping system generates a paycheck but the employment must also exist in PPS. If the student is a new hire and the employment does not exist in PPS, the On-Line Timekeeping system will not generate a paycheck. You must input the employment the day before the On-Line Timekeeping deadline in order for the student’s record to show up in On-Line Timekeeping.

Since most retroactive changes for graduate students occur on Sub-0, most of our examples are for TAs/GSRs. However, you can follow similar procedures for retroactive changes on sub-2.

**RETROACTIVE CHANGE DEFINITION**

For Sub-0 and Sub-2, a retroactive change is defined as one in which you input an action after the "Last Day to Update the EDB to Affect the Paycheck" (refer to the Payroll Timekeeping and PPS Deadline Schedule).

For example, using the Monthly Entry/Update Schedule, assume that 3/22 is the last day to input the sub-0 PPS Entry to generate a paycheck for the period 3/1- 3/31. If you input an action on or before 3/22 for the month of March, you have made the deadline to input the action and the sub-0 paycheck issued 4/1 will be correct. However, if you input a sub-0 action for the month of March any day AFTER 3/22, you are too late to affect the 4/1 paycheck and this would be considered a retroactive change.

**In general, you will need to delete the entire appointment/distribution line and add a new appointment to ensure that the changes hit the correct fund source. Do not overtype sections of an entry.**
There are two types of retroactive changes:

1. **Clear Dated Retroactive Change**

   A clear dated retroactive change is one in which you input an action after the deadline (as described above) but the begin date of the action still appears on the EDB on the appointment and distribution lines. Example: Employment dates exist in PPS and you retroactively increase the percent time.

   In the Comments section of PAN, your comments are as follows:

   Line 1: Comment begins with the words "Clear Dated Retroactive" and then describes the type of action.

   Line 2: For actions affecting pay, always state “Affecting Pay - Sub-X” (then indicate whether sub-0 or sub-2). For actions not-affecting pay, state "Not-affecting Pay - Sub-X" (show the sub).

   Line 3: List the "Effective" dates of the retroactive action that paid incorrectly. For example, a retroactive increase in percent time for March would be listed "Effective 3/1 - 3/31". A retroactive fund change for March and April would be listed "Effective 3/1 - 4/30".

   Line 4: For clarification, you can add a line here to assist the Graduate Division in understanding why you have made this change.

2. **Stale Dated Retroactive Change**

   A stale dated retroactive change is one where the effective date of the action is before the existing appointment/distribution begin dates. In other words, you had previously set up an appointment/distribution line that you want to change, but the begin date of your change no longer shows up in PPS.

   In the Comments section of PAN, your comments are as follows:

   Line 1: Comment begins with the words "Stale Dated Retroactive" and then describes the type of action.

   Line 2: For actions affecting pay, always state "Affecting Pay - Sub-X" (then indicate whether sub-0 or sub-2).

   Line 3: On this line, type "OLD - "

   Line 4: Show the old dates, title, percent time, rate

   Line 5: For clarification, you can add a line here to assist the Graduate Division in understanding why you have made this change.
CLEAR DATED RETROACTIVE CHANGES

A clear dated retroactive change is one in which you input an action after the deadline (as previously described) but the begin date of the action still appears in PPS on both the appointment and distribution lines.

You can refer to the following examples to better understand how to input clear dated retroactive changes:

Example 1: Fund Change
Example 2: Change in Percent Time (affects less than the entire appointment)
Example 3: Change in Percent Time (affects the entire appointment)
Example 4: Change in End Date
Example 5: Change (sub-2) from Hourly to Monthly or vice versa
Example 6: Change in Title Code (not affecting pay)
Example 7: Change in Title Code (affecting pay)
Example 8: Error correction of Monthly Pay Rate

NOTE: Reference a previous PPS action (you can use Employee History to identify the date of the PPS action) in the Comments section if you need to make additional changes. This will assist Payroll in identifying the previous PPS action that requires a change and determining the appropriate action.
EXAMPLE 1: FUND CHANGE (CLEAR DATED)

EXAMPLE: A student was set up as a 50% GSRTF from 10/01 - 12/31 and paid on index ABC1234. Today is 11/26 and you want to change the index to CDE5678 effective 11/01 - 12/31. You check the Monthly Entry/Update Schedule and determine you've missed the 11/24 deadline for inputting the action to affect November.

**Action:**
End distribution 11 on 10/31
Add distribution 12 with the new index from 11/01 -12/31.

*For PAN, enter the mandatory comment:*
CLEAR DATED RETROACTIVE FUND CHANGE
Not affecting Pay - Sub-0
Effective 11/01 - 11/30
“EPET” (Electronic Payroll Expense Transfer) being submitted

EXAMPLE 2: CHANGE IN PERCENT TIME (CLEAR DATED) AFFECTS LESS THAN THE ENTIRE APPOINTMENT

EXAMPLE: A student is currently set up as 25% TA 10/01 to 06/30. On January 31, you discover that the student's percent should have increased to 50% effective 1/01.

**Action:**
End Appt/Dist #10/11 on 12/31 at 25% time.
Add Appt/Dist 20/21 at 50% time 1/1 - 6/30

*Comments should state:*
CLEAR DATED RETROACTIVE PERCENT CHANGE
AFFECTING PAY - SUB 0
Effective 1/1 - 1/31
Increase TA from 25% to 50% beginning 1/1
EXAMPLE 3: CHANGE IN PERCENT TIME (CLEAR DATED) AFFECTS THE ENTIRE APPOINTMENT

EXAMPLE: A student is currently set up as 25% TA 1/01 to 06/30. On February 1, you discover that the student's percent should have been 50% for 1/01 - 06/30 rather than 25%.

Action:
Delete Appointment 10/Dist 11. (Tab to command line and type: delete 10).
Add Appointment 20/Dist 21 with the correct information (Type Add 20; not Add A).

Comments should state:
CLEAR DATED RETROACTIVE PERCENT CHANGE
AFFECTING PAY - SUB 0
Effective 1/1/ to 1/31 increase pay from 25% to 50%
DEL #10 at 25% 1/1 to 6/30
Add #20 at 50% 1/1 to 6/30

EXAMPLE 4: CHANGE IN END DATE (CLEAR DATED)

EXAMPLE: A TA is set up at 50% time from 10/1 to 06/30. On February 3, the department realizes that the student did not work in January, is not registered Winter quarter, is on Leave of Absence Winter quarter but should return Spring quarter. Luckily, the student was not on direct deposit and the department has the hard-copy paycheck. The department calls Payroll to make arrangements to return the check.

Action:
Change the appointment end date to 12/31
Change the distribution end date to 12/31

Comments should state:
CLEAR DATED RETROACTIVE END DATE
AFFECTING PAY - SUB 0
1/1 - 1/31; student overpaid, hard-copy check being returned to Payroll
End TA 12/31; not registered Winter Qtr; on Leave of Absence
EXAMPLE 5: SUB-2 CHANGE FROM HOURLY TO MONTHLY (CLEAR DATED)

EXAMPLE: The Home Department hires a student as a 20% Reader from 4/1 to 6/30 at the hourly rate of $X.xx. The information is currently on screen as Appointment 10/Distribution 11. An outside program does not discover until the May 1 payday that they forgot to add a 25% TA for Spring Quarter.

Action:
The outside program must call the Home Department to obtain pre-approval to hire the student and to obtain access to the PPS system as an alternate department in order to enter the TA information.

The outside program must request the Home Department to delete the old Reader appointment 10/distribution 11 at the hourly rate and add a new appointment 20/distribution 21 at the monthly rate because a student cannot be employed hourly and monthly simultaneously. The Home Department will also have to process an adjustment in the On-Line Timekeeping system.

Home Department deletes old Reader #10/11 appt/dist at hourly rate.
Home Department adds new Reader #20/21 appt/dist at monthly rate.

Outside Program adds the new TA appointment #30/31.

Comments should state (for Reader action):
CLEAR DATED RETROACTIVE CHANGE FROM HOURLY TO MONTHLY AFFECTING PAY - SUB 2
4/01 - 4/30
DEL #10/11 at hourly rate; Add #20/21 at monthly rate
Debit/Credit On-Line Timekeeping submitted on 5/1

Comments should state (for TA action):
CLEAR DATED RETROACTIVE ADDITIONAL EMPLOYMENT AFFECTING PAY - SUB 0
Effective 4/1 - 4/30
Add 25% TA Spring ; TAHI/TAFE = S
EXAMPLE 6: TITLE CODE CHANGE (CLEAR DATED) - NOT AFFECTING PAY

Example: By mistake, a student was set up as GSR, Title Code 3266, at 49.99% from 1/1 to 6/30. The information is currently on screen as Appointment/Distribution 10/11. On March 5, the error is discovered. The student should have been set up on Title Code 3284 because the GSR appointment is 25% time or more and is eligible for GSR tuition-and-fee Remission (GSRTF).

Action:
You should input by adding and then deleting; if you delete then add, be sure to tell the system to add an Appt number rather than Add “A”)

Add a new appt/dist 20/21 with the correct title code, 3284.
Delete the old appt/dist 10/11 with the incorrect 3266 title code.

For PAN, enter the mandatory comment:
CLEAR DATED TITLE CODE CHANGE
Not Affecting Pay - Sub 0
DEL #10/11 on 3266, add #20/21 on 3284

EXAMPLE 7: TITLE CODE CHANGE (CLEAR DATED) - AFFECTING PAY

Example: A student is set up at 49% GSRTF from 1/01 to 6/30. On February 1, you find out that the student should have been a 50% TA from 1/01 to 3/31 and then 49% GSRTF from 4/01 to 6/30.

Action:
Delete the original GSRTF appt/dist #10/11 from 1/01 to 6/30.
Add a new appt/dist for the TA 1/01 to 3/31; Appt 20/Dist 21
Add a new appt/dist for the GSRTF 4/01 to 6/30; Appt 30/Dist 31

Comments should state:
CLEAR DATED TITLE CODE CHANGE
AFFECTING PAY - SUB 0
Effective 1/1 - 1/31
Del #10/11, GSRTF (#3284) 49%, 1/1 to 6/30; Add 50% TA (2310) Winter
EXAMPLE 8: ERROR CORRECTION OF MONTHLY PAY RATE - (CLEAR DATED)

EXAMPLE: Due to a typographical error, an incorrect salary amount was entered for a TA from 4/1 to 6/30. On May 1, the error is discovered.

The information is currently on screen as Appointment 10/Distribution 11.

Action:
Add a new distribution 12 with the correct monthly salary rate from 4/1 to 6/30.
Delete the old distribution 11 with the incorrect salary rate.

Comments should state:
CLEAR DATED RETROACTIVE RATE CHANGE
AFFECTING PAY - SUB 0
4/1 - 4/30
Delete #11 4/1 to 6/30 with incorrect TA rate of $
Add #12 4/1 - 6/30 with correct TA rate of $
STALE DATED RETROACTIVE CHANGES

A stale dated retroactive change is one where the effective date of the action is before the existing appointment/distribution begin dates. In other words, you had previously set up an appointment/distribution line that you want to change, but the begin date of the change no longer exists on the EDB.

You can refer to the following examples to better understand how to input stale dated retroactive changes:

Example 9: Fund change

Example 10: Change in Percent time

Example 11: Adding Employment
EXAMPLE 9: RETROACTIVE FUND CHANGE (STALE DATED)

EXAMPLE: A student had a prior Appointment 10/Distribution 11 as GSR, 7/01 to 9/30. That Appointment/Distribution has since dropped off. Only the current Appointment 20/Distribution 21 as GSRTF is showing effective 10/01 to 6/30.

On 2/1, you are told to change the GSR's index/funds for the period 9/1- 9/30.

Action:
Stale dated retroactive "fund change only" actions that end before the existing distribution begin date should not be entered in the system. The change will be done by means of a payroll expense transfer (EPET).

EXAMPLE 10: RETROACTIVE PERCENT CHANGE IN TIME (STALE DATED)

EXAMPLE: A student was previously set up as a 50% GSR 7/1 - 9/30. It is now February and monthly maintenance has dropped that old information. The only appointment showing on the EDB is the current GSRTF, title code 3284 from 10/01 to 06/30 on Appt/Dist #20/21. In February, the department is informed that the student should have been paid 100% during the previous summer, 7/01 to 09/17.

Action:
Because the retroactive percent change end date occurs before the begin date of the existing appointment/distribution, build only the proper appointment/distribution on the next available appointment/distribution number.

Leave the current Appointment 20/Distribution 21 as it appears now.
Add the retroactive appointment the correct way it should be paid.

For PAN, enter the mandatory comment:
STALE DATED RETROACTIVE PERCENT CHANGE AFFECTING PAY - SUB 0
OLD 7/1 - 09/30, 3266, 50%, $XXXX
Increase GSR from 50% to 100% 7/1 - 9/17; remain 50% 9/18 to 9/30.
EXAMPLE 11: ADDING EMPLOYMENT (STALE DATED)

Occasionally a department discovers after the pay period that it has overlooked paying a student. When this happens, it is not considered a "Retroactive Change" because you have nothing to change but is instead a "Retroactive Addition" because you are adding an appt/dist.

When this happens, you should contact the Graduate Division so that we can coordinate the action with Payroll to insure proper completion of the action in PPS, especially if the situation is not similar to the following:

EXAMPLE: A student was paid as a TA through 6/30. There is no summer employment and the student is "rehired" in September as a TA 10/1 - 6/30. In November, the department is told that the student should have been paid as a 50% GSR (sub-0) from 7/1 - 7/31.

**Action:**
In order for the system to allow you to input the action, you must change the "Hire Date" from 10/1 to 7/1. Since the student was previously appointed through 6/30, there is no break in service.

In PPS, you would add the July GSR information as a new appt/dist. Since the system cannot generate retroactive payments on Sub-0, and the paycheck must be manually prepared by Payroll, you would enter the following comments.

**Comments should state:**
STALE DATED RETROACTIVE ADDITION OF APPOINTMENT
AFFECTING PAY - SUB 0
ADD 50% GSR 7/1 - 7/31
19. Action Codes

An action code is a 2 digit numeric code that defines and describes the type of employment action or change for an individual. Action codes can be at the employee level, appointment level, and distribution level.

There are two types of action codes: assigned and derived. An assigned action code is entered by the department at the time the employment information is input into the computer. An example of an assigned action code is Code 17 which is entered at the appointment level to indicate an extension of an end date. A derived action code is assigned automatically by the computer based upon the information input by the user. An example of a derived action code is Code 16 which indicates a change in percent time.

The PAN notice will include the action codes so that reviewers can quickly determine what action has taken place. When making a change to a record (other than appointment change in percent time), if you do not assign an action code, the system will assign a ‘40’ or ‘50’ - ‘Other’. This provides no clue as to what action has taken place. For this reason, you should make some effort to correctly assign action codes. In some cases, it will be clear what action code you should assign, such as the examples given for action codes 13, 14, 17 and 18; however, there will be many cases where it will be perfectly appropriate to let the system default to a ‘40’ – ‘Other’ because no action code accurately describes the action.

**DERIVED ACTION CODES – YOU DO NOT INPUT CODE**

01 – New hire (Employee Level)

The student has never been previously appointed/employed at UCSD and does not have an assigned Payroll identification number. Use the new hire (HIRE) bundle for data entry. The system will automatically show action code 01 on the PAN.

02 – Rehire (Employee Level)

A student has previously been appointed/employed at UCSD and already has an assigned Payroll number. Use the re-hire (RHIR) bundle for data entry. The system will automatically show action code 06 on the PAN.

06 – Separation (Employee Level)

A student is terminating his appointment with the university. Use the separation bundle for data entry. The system will automatically show action code 06 on the PAN.

40 – Other (Appointment Level)

Other appointment level change. Use the EAPC screen for data entry. The system will automatically show action code 40 on the PAN.
50 – Other (Distribution Level)
Other distribution level change. Use the EAPC screen for data entry. The system will automatically show action code 50 on the PAN.

ASSIGNED ACTION CODES – YOU MUST INPUT CODE

13 – Additional Appointment (Appointment Level)
The student currently has an appointment. An additional appointment is being added simultaneously. Use the EAPC screen. Example: The student is already set up as a fall quarter TA and you are now adding a fall quarter Reader.

17 – Extension of Appointment (Appointment Level)
The appointment end date is being extended. Use the EAPC screen. Example: The student is already set up as a fall quarter TA and you are now extending the TA through the winter.
20. Remarks/Comments Field

Completion of the comment field for graduate student actions is important. The comments field will appear on the PPS/PAN notice. Comments should briefly summarize the action but give enough information so that reviewers have no questions regarding the appointment. If you are a funding department, the student’s academic department/group may ask you to give specific comments to assist in their review of the PPS/PAN notice. You should include a comment for all actions. Include your name and phone number in case someone needs to contact you regarding the PPS entry.

Examples are:

GSRTF 49%, 10/1 - 12/31/06
GSRTF = FWS
BPO (For budgetary purposes only)

------------------------------------------------------------------------------

TA 25%, 10/1 - 3/31/07
TAHI/TAFE = FWS
LIT Fall, Winter/ Muir Writing Spring

------------------------------------------------------------------------------

TA 50%, 1/1 - 3/31/07 & Reader 25%, 1/1 – 3/31/07
75% Exception Approved by Dean Kim E. Barrett on 12/15/07

------------------------------------------------------------------------------

Tutor 15%, 4/01 – 6/30/07
Graduate Enrichment Program – Payment not to exceed $550

------------------------------------------------------------------------------

GSR – Terminating 7/31/07
Student graduated (give explanation as to why the appointment is terminated).

------------------------------------------------------------------------------

Apt 20 - Changed end date from 6/30/07 to 3/31/07.
LOA (Leave of Absence) Spring Quarter.

------------------------------------------------------------------------------

Clear Dated Retroactive Action Affecting Pay
(Refer to samples in the Retroactive Action chapter).

------------------------------------------------------------------------------

TA Daily Rate of Pay – Payroll Action Required
Graduate Division (staff name) has been contacted and reviewed/approved TA daily rate of pay action
Student resigned 50% TA on 10/2/06 and went on Leave of Absence Fall quarter
Worked 11 days (9/18 – 10/2)
11 days worked x $86.725 (50% TA daily rate of pay) = $953.98 total pay
21. Benefits

**AFFORDABLE CARE ACT (ACA) EMPLOYER SHARED RESPONSIBILITY REQUIREMENTS.**

Beginning 1/1/16, all UC employees working an average of 30 hours per week for three months or more during a measurement period are required to be offered at least a Core Benefits Package. The offer applies to the following appointment types: per diem employees, students in casual/restricted appointments, seasonal workers, and those compensated solely by agreement (flat-dollar compensation). The UC Office of the President will contact eligible employees by December 31 to offer them Core Benefits and inform them of a special enrollment period in January.

While the Affordable Care Act (ACA) requires that full-time employees are offered coverage, it does not require that the employee enroll in a plan.

While the changes will take effect January 1, 2016, the determination of eligibility is based on a calculation of hours worked during a 12-month look-back measurement period which started in November 2014. Consequently, employees in the ineligible categories may qualify for UC insurance in 2016, based on their 2015 employment history. The retrospective calculation and determination of eligibility will occur annually and will be administered automatically in the Payroll Personnel System (reflected as a change from BELI code 5 to 4). This group will also be measured for ongoing eligibility during the look-back period, but they must work on average 30 hours per week to continue coverage.

The changes may result in an increase in benefits costs to departments in calendar year 2016 and beyond if employees in the eligible job categories meet the benefits eligibility criteria during subsequent measurement periods. When considering a future budget plan, departments should keep in mind that going forward, benefits eligibility for employees may continue for a longer period of time.

Complete details on the new provisions impacted by the ACA regulations, including UC employer shared responsibility requirements, can be accessed at the UC Net website: [http://blink.ucsd.edu/go/aca](http://blink.ucsd.edu/go/aca).

Additional information is provided in the Frequently Asked Questions section at: [http://ucnet.universityofcalifornia.edu/oe//faq/aca-faq.html](http://ucnet.universityofcalifornia.edu/oe//faq/aca-faq.html).

**CHILDBIRTH ACCOMMODATION FOR DOCTORAL STUDENTS**

Doctoral student women who are anticipating childbirth and have Graduate Student Researcher (GSR), Teaching Assistant (TA), Associate In appointments, or Fellowships/traineeships may be excused from regular employment duties for a period of up to six weeks without loss of financial support. The full policy and petition can be found at: [http://grad.ucsd.edu/financial/student-parents.html](http://grad.ucsd.edu/financial/student-parents.html).
CHILD CARE REIMBURSEMENT PROGRAM

Effective July 1, 2008, a system-wide child care reimbursement policy was established to reimburse ASEs appointed at 25% time or more who have (a) qualified dependent(s). As of Summer 2014, each ASE shall receive up to $900 per quarter for expenses incurred during the ASE’s appointment period during the academic year and a maximum reimbursement of $900 for all of Summer Session. A fact sheet with questions and answers can be found at: http://ucnet.universityofcalifornia.edu/forms/pdf/ase-child-care-reimbursement-program.pdf.

Effective Fall 2013, students employed as Graduate Student Researchers (GSRs) in PPS at 25% time or more on one of the following title codes: 3262, 3263, 3264, 3284, 3285, 3286, 3287 will be eligible for reimbursement of qualifying childcare expenses. As of Summer 2014, each eligible GSR shall receive up to $900 per quarter for expenses incurred during the GSR’s appointment period. In addition, GSRs appointed at 25% or more during the summer will also be eligible for up to a maximum reimbursement of $900. A fact sheet with questions and answers can be found at: http://grad.ucsd.edu/_files/financial/ucsd_gsr_childcare_reimbursement_factsheet.pdf.

The ASE Child Care Reimbursement Form UBEN 254 is available at: http://ucnet.universityofcalifornia.edu/forms/pdf/uben-254.pdf. The form must be submitted by the student to the hiring department together with appropriate receipts and documentation no later than the last day of the following term.

The GSR Child Care Reimbursement Form 254 available at: http://grad.ucsd.edu/_files/financial/ucsd_gsr_uben254.pdf. The form must be submitted by the student to the student’s academic home department/program together with appropriate receipts and documentation no later than the last day of the following term.

Departmental Procedure to process the reimbursement:

- The reimbursement payment should be added as a new distribution to the existing appointment in PPS using sub 2 and DOS code BXC.
- You may use current or retroactive monthly dates within the appointment period. If it is a retroactive date, then it will be paid on the next available compute. Retroactive fund changes for childcare reimbursements require an EPET in addition to updating PPS.
- The appointment must be set up on a monthly pay schedule. To reimburse a bi-weekly Reader/Tutor, you will need to change the pay schedule and rates to monthly.
- The reimbursement is considered taxable earnings. The BXC will be flat taxed (25% federal and 6.6% state) if it’s not paid with the regular earnings.
- Payment will be issued on the next monthly or bi-weekly pay period based on the distribution dates.

IMPORTANT: Payroll will be entering the information in the ETFT screen, so it is critical that you notify them at payrollcomp@ucsd.edu.
The Child Care Reimbursement Form should be kept by the student’s **hiring department** in the student's employment file for **ASE’s**, and kept by the student’s **academic home department/program** in the student's employment file for **GSR’s**. The student should be notified once the reimbursement has been processed.

Effective Fall 2015, students supported by fellowship/traineeship funds at the equivalent of a Graduate Student Reader for at least 25% time plus resident tuition and fees will be eligible for reimbursement of qualifying childcare expenses up to a maximum of $900 per quarter. A fact sheet with questions and answers can be found at:


The Fellow/Trainee Child Care Reimbursement Form is available at: [http://grad.ucsd.edu/_files/financial/uben254-UCSD%20Fellow-Trainee.pdf](http://grad.ucsd.edu/_files/financial/uben254-UCSD%20Fellow-Trainee.pdf). Students will be reimbursed by departments and programs using the same procedures used for stipend payments through the Graduate Division. The **Fellow/Trainees’s academic home department** will be responsible for providing all required forms, records, and receipts to the Graduate Division.

**ACADEMIC STUDENT EMPLOYEE (ASE) LEAVES**


**Bereavement Leave**

Subject to the provisions of the ASE union contract, the University will grant an ASE’s reasonable request for bereavement leave due to the death of a family member as defined in Section H. The period of bereavement leave shall be up to three (3) days per occurrence. Salaried (sub 0) ASEs shall be granted up to three (3) days pay for bereavement on those days the employee was previously scheduled to work.

**Jury Duty**

An ASE shall be eligible for a jury duty leave when summoned for required jury duty service. Jury duty leave is leave with pay. Students should be encouraged to defer their jury duty to the summer months, if possible, when classes are not in session so as to not inconvenience the enrolled students. Verification of actual service for jury duty shall be provided by the ASE to the appropriate timekeeper. Pay for jury duty will not continue past the end date of the ASE’s appointment.
Long –Term Medical Leave and Family-Related Leave

Subject to the provisions of the ASE contract, the University will grant a salaried (sub 0) ASE’s reasonable request for long-term leave during the academic year. Whenever possible the leave should be requested at least thirty (30) days in advance. The leaves described below may be combined for a maximum of six (6) weeks of leave during the academic year. The leave cannot be continued beyond the end date of the ASE’s appointment.

1. Paid Leave for Pregnancy Disability, Childbirth and Related Medical Conditions.

A salaried ASE shall be eligible to receive up to six (6) weeks of paid leave for pregnancy, childbirth or related medical conditions for the period prior to, during, and after childbirth. Any paid leave taken under this Section shall run concurrently with any leave taken under Section B. pursuant to California’s Pregnancy Disability Leave Laws. An ASE will be approved for up to two additional weeks of unpaid leave for baby bonding, provided such unpaid leave does not extend beyond the end date of the ASE’s appointment. Unpaid leave may be granted for periods beyond the terms of leaves in this Section D, at the sole discretion of the University.

Under the Graduate Division Childbirth Accommodation policy, Ph.D. and MFA student women who are anticipating childbirth and have GSR, TA or Associate (sub 0) appointments may be excused from employment for a total of 6 weeks without loss of pay. Students eligible for both the Accommodation Policy and the ASE child bearing leave benefit will use the ASE benefit. The Petition for Childbirth Accommodation form is available at:

http://grad.ucsd.edu/financial/student-parents.html

When entering a leave of absence into PPS, use the ELVE screen to enter the appropriate LOA code:

Leave of Absence action code: 7 (with pay)
Type code: 4 (pregnancy disability)
Enter the LOA begin date and the LOA return date.

Note: The cost of a childbearing leave for a Graduate Student Researcher must be paid by the faculty’s grant. Upon request, the Graduate Division will consider offering reimbursement for a GSR substitute for up to 6 weeks.

2. Other Paid Leave

A salaried (sub 0) ASE shall be eligible to receive up to four (4) weeks of paid leave for a serious health condition as defined under the Family Medical Leave Act (FMLA) of the ASE or the ASE’s family member. Additionally, this leave may be used for the care and bonding with an ASE’s newborn or child placed with the ASE for adoption or foster care, provided that the leave is taken within twelve months of the birth or placement of the child with the ASE.

When entering a leave of absence into PPS, use the ELVE screen to enter the appropriate LOA code.
Leave of Absence action code: 16 (4 weeks)

An ASE receiving paid leave for pregnancy disability, childbirth, related medical condition or for illness or injury from any other source within the University will not be eligible to receive leave.

**Military Leave**

ASEs called to active military service shall be provided leave from their current positions to fulfill their military obligations. Military leave will be paid to the extent required by applicable law.

**Pregnancy Disability Leave**

Under the California Pregnancy Disability Leave Laws, ASEs are entitled to unpaid leave for up to four months per pregnancy and/or reasonable accommodation for pregnancy disability, childbirth, and related medical conditions. Notwithstanding the foregoing, a Pregnancy Disability Leave will not continue beyond the end date of the ASE’s appointment. The University will maintain and pay for health insurance coverage (University-sponsored Student Health Insurance Plans, or other insurance for non-student ASEs, as applicable) for the duration of the leave, not to exceed four months in a 12-month period under the same conditions that coverage would otherwise have been provided by the University if the employee had been in employment continuously for the duration of the leave.

**Short-Term Family-Related Leave**

The University will grant an ASE’s reasonable request for leave of absence of appropriate duration due to:

- Personal illness and/or disability
- Birth, adoption, or care of a child or family member as defined in Section H of the ASE union contract
- Family emergencies

**Paid Medical Leave and Family Leave**

Subject to the provisions of the ASE union contract, students appointed on salaried (sub 0) ASE titles at 50% for an academic quarter are eligible for no more than two (2) paid sick leave days per quarter. For ASEs who are employed other than 50% FTE, the amount of paid leave will be prorated. (e.g. 25% appointment = one (1) day sick leave). The leave does not accrue from quarter to quarter.

Leaves shall be unpaid for non-salaried (sub 2) employees.

The student should complete an absence slip and provide it to the hiring department timekeeper. The department will monitor and provide summary of short-term usage as requested by the Graduate Division and/or Labor Relations.
In the case of the student being simultaneously employed by two or more departments, the student will earn leave from each department based on the percentage of the appointment. For example, a student with two 25% appointments would earn two (2) days per quarter – one (1) day from each department. Two absence slips would need to be completed.

Vacation

Students appointed as Teaching Assistants, Associates, Readers and Tutors do not accrue formal vacation.

There is no formal vacation accrual for students appointed as Graduate Student Researchers since their employment may not exceed 49.99% time during the academic year.

Workers’ Compensation

A student appointed on an academic title may be eligible for workers’ compensation benefits for qualified injury or accident. Additional information may be obtained from the Workers’ Compensation program, x40136 or x44785.

UC DEPENDENT CARE FLEXIBLE SPENDING ACCOUNT PROGRAM

The UC Dependent Care Flexible Spending Account) was implemented January 1, 2009.

DepCare FSA Highlights:

- Academic Student Employees (TAs, Associates, Tutors & Readers) and Graduate Student Researchers appointed at 43.75% time may enroll in this program.
- The employee must enroll during their period of initial eligibility (PIE = 31 days from the appointment begin date) or when they have a change in family or employment status. Employees may not enroll after their PIE expires.
- DepCare FSA allows enrollees to pay for eligible dependent care expenses on a pretax, salary reduction basis.
- The employee forfeits (i.e. “use it or lose it”) any contribution they can’t claim for the plan year.
- The minimum contribution is $180/year, maximum contribution is $5,000/year.
- Monthly deductions are based on the annual contribution elected by the employee divided by the remaining months within a calendar year. NOTE: monthly contributions continue only as long as the employee remains on active pay status and is otherwise eligible.
- Enrollment forms should be submitted by the 15th of the first month of the eligible appointment to meet the monthly payroll deadline.
- For payroll deduction purposes, Readers and Tutors must be set up on a Monthly pay schedule if they wish to enroll in the program.

Enrollment Information:

IMPORTANT: To meet the payroll deadline, enrollment forms must be submitted to the Graduate Division by the 15th of the month. Payroll deductions will begin on the next payday. Late forms will not be processed until the next month.
- Employees must re-enroll in the plan if they have a one day break in service/pay.
- Eligible employees who wish to enroll in the program should complete the following enrollment form: [http://ucnet.universityofcalifornia.edu/compensation-and-benefits/other-benefits/flexible-spending-accounts/ase-depcare/index.html](http://ucnet.universityofcalifornia.edu/compensation-and-benefits/other-benefits/flexible-spending-accounts/ase-depcare/index.html) and send the form to: Becky Burrola, Graduate Division, Mail Code 0003
22. Defined Contribution Program (DCP), Medicare, and Unemployment Insurance

The following is a brief explanation. For additional information, contact:
Graduate Division, (858) 534-6562 (general information about DCP rules), or on the web: [http://grad.ucsd.edu/financial/employment/student-fica-dcp.html](http://grad.ucsd.edu/financial/employment/student-fica-dcp.html)

For current balances in the DCP program, contact Fidelity Retirement Services at:
1-(866)-682-7787 or [https://netbenefits.fidelity.com/](https://netbenefits.fidelity.com/).

Note: The requirements listed below do not apply to students receiving fellowships stipends or the salaried checks of international students (F-1 and J-1 visas) who are non-resident aliens.

Academic Year (September – June): Under IRS guidelines, a student employee (non-career) who is a U.S. citizen, permanent resident or resident alien must be registered a minimum of half-time (six units at UCSD) and be employed less than 80% for at least one day of the month to remain exempt from DCP/Medicare deductions. During the academic year, a graduate student who has advanced to Ph.D. candidacy is not subject to the unit requirement.*

*NOTE: The IRS requirements for FICA exemption should not be confused with UCSD graduate student support guidelines requiring full-time registration (minimum of 12 units) for funding on fellowships, traineeships, scholarships and academic appointments greater than 25% time or the UCSD rules that limit employment to 50% (unless an exception has been approved by the Dean of the Graduate Division).

Summer Months (July and August): Most graduate students are subject to deductions during July and August. For these months, a graduate student must be registered in Summer Session for at least one day of the pay period and be employed less than 80% time to remain exempt. The minimum unit requirement is six units if registered in a ten-week summer session and three units if registered in a five-week summer session.

A graduate student who does not meet the above criteria will have 8.95% taxes withheld from the entire paycheck. The 8.95% consists of 7.5% into the Defined Contribution Plan (DCP) and 1.45% for Medicare.
STUDENT EMPLOYEE DCP SAFE HARBOR/MEDICARE ERROR CORRECTION FORM

INSTRUCTIONS: Departmental staff should complete this form to correct an error in a student employee’s DCP/Medicare deduction due to an administrative or ISIS/PPS interface error. It is essential that departments ensure the accuracy of the percentage on the appointment line in PPS. Retroactive corrections for inaccurate appointment percentages will not be done.

A student’s salary earnings are subject to DCP/Medicare if student is registered in less than 6 units or employed 80% or more. Interfaces occur at the third and fifth weeks of each academic quarter and during periods of summer session.

Undergraduate student: Send form to ES (Employment Services), Mail code 0335
Graduate student: Send form to Graduate Division, Mail Code 0003

Student Name: ___________________________ Employee ID: ____________
Department Name: ___________________________ Department Ext: ____________

☐ UNDERGRADUATE
☐ GRADUATE

Please indicate the required action:

1. ☐ DCP/Medicare should be refunded.
2. ☐ DCP/Medicare should be withheld.
3. Date(s) of affected paychecks: ____________________________________________

Explanation (required): ________________________________________________________

__________________________________________________________
Department Signature Date

__________________________________________________________
Student Signature Date

__________________________________________________________
Employment Services or Graduate Division Signature Date

__________________________________________________________
Payroll Signature Date

07/15 GRAD/DCPERROFORM


23. Intercampus Exchange

In general, a registered graduate student in good standing at any of the UC campuses is eligible for employment on a student academic title or casual-restricted position at another UC campus.

When employing a student from another UC campus, the UCSD fund source must contact the student’s Home Campus Department and Graduate Division to obtain approval and verify employment eligibility.

When another UC campus is employing a UCSD graduate student, the student’s UCSD academic department/program (Home Dept) must verify eligible, grant pre-approval of the employment.

All intercampus employment as a 25% time or more TA, Associate or GSR must be coordinated with the Graduate Division for appropriate fee payment action.

An international student in F-1 or J-1 status must receive work permission from the Home Campus International Center before they can be employed at another campus.

Note the following:

1. If the student is not concurrently employed at the Home Campus, the student can be set up as a new hire in the UCSD PPS system. The “comments” should indicate the campus where the student is registered and which office(s) verified eligibility for employment. Student status = 7.

2. If the student is concurrently employed at another campus and UCSD, the new funding source should complete all sections of the “Temporary Intercampus Appointment Form”, UPAY 560-T. Refer to the instructions in PPM 230-44 and use Exhibit A, on the web at: http://adminrecords.ucsd.edu/ppm/docs/230-44.html. You may also obtain the form from the OP website: http://www.ucop.edu/; Do a search for UPAY 560-T and you will find the form as a word document.

The form must be approved by the UCSD Academic (Home) department (when applicable) and routed to the Graduate Division for the Dean’s approval. Graduate Division will route the form to the Academic Personnel Office and they will send the form to UCSD Payroll (UCSD employee) or the other campus’ Academic Personnel Office.

3. The “Intercampus One-Time Payment Form (exhibit B in PPM 23-44) is usually not used for payments to graduate students. The funding source should contact the Graduate Division for assistance in processing this form.
### STUDENT ACADEMIC TITLE RATES

**Effective 10/1/16 (monthly employees)**

**Effective 10/9/16 (bi-weekly employees)**

<table>
<thead>
<tr>
<th>TITLE</th>
<th>CODE</th>
<th>RATES</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Teaching Assistant (9/9)</td>
<td>2310</td>
<td>4455.78/month, 40,102 annual</td>
</tr>
<tr>
<td>*Associate (in lieu of TA) (9/9)</td>
<td>1506</td>
<td>4668.44/month, 42,016 annual</td>
</tr>
<tr>
<td>*Associate-in-(Dept) (Teaching a course) (9/9)</td>
<td>1506</td>
<td>5534.11/month, 49,807 annual</td>
</tr>
<tr>
<td>+Graduate Student Researcher (11/12)</td>
<td>3266</td>
<td>Step 1 3163/month, 37,956 annual</td>
</tr>
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<td></td>
<td></td>
<td>Step 2 3409/month, 40,908 annual</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Step 3 3781/month, 45,372 annual</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Step 4 4084/month, 49,008 annual</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Step 5 4355/month, 52,260 annual</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Step 6 4558/month, 54,696 annual</td>
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<td></td>
<td></td>
<td>Step 7 4923/month, 59,076 annual</td>
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<td></td>
<td></td>
<td>Step 8 5315/month, 63,780 annual</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Step 9 5741/month, 68,892 annual</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Step 10 6199/month, 74,388 annual</td>
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<tr>
<td>GSR Tuition-and-Fee Remission Rate 10/1/16-6/30/17 (sub b):</td>
<td>3262</td>
<td>same GSR salary as above</td>
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<tr>
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<td>3263</td>
<td>“</td>
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<td></td>
<td>3267</td>
<td>“</td>
</tr>
<tr>
<td>*#Reader (9/9)</td>
<td>2850</td>
<td>15.32/hour; 2665.68/month, 23,991 annual</td>
</tr>
<tr>
<td>*#Tutor (9/9)</td>
<td>2860</td>
<td>14.56/hour; 2533.44/month, 22,801 annual</td>
</tr>
<tr>
<td>Graduate Student Single Session</td>
<td>2510</td>
<td>18.92/hour; 3292.08/month, 29,629 annual</td>
</tr>
<tr>
<td>Group Session</td>
<td></td>
<td>22.70/hour; 3949.80/month, 35,548 annual</td>
</tr>
<tr>
<td>Undergraduate Student Single Session</td>
<td>2510</td>
<td>14.56/hour; 2533.44/month, 22,801 annual</td>
</tr>
<tr>
<td>Group Session or Tutor serving as a Teaching Apprentice</td>
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<td>17.45/hour; 3036.30/month, 27,327 annual</td>
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<tr>
<td>Postdoctoral Tutors Single Session</td>
<td>2510</td>
<td>23.30/hour; 4054.20/month, 36,488 annual</td>
</tr>
<tr>
<td>Group Session</td>
<td></td>
<td>27.93/hour; 4859.82/month, 43,738 annual</td>
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**NON-STUDENT** (requires Dean Kit Pogliano’s pre-approval)

*Reader (non-student) 2500 Use graduate reader rate if holds baccalaureate*

*Tutor (serving in the role of TA or tutor) 2510 Use graduate teaching assistant or tutor rate if holds baccalaureate*

*Effective 6/1/00, Academic Student Employees (ASEs) are covered by the collective bargaining agreement between the University and the United Auto Workers (UAW).*

# The effective date for Readers and Tutor title rates for students paid on a bi-weekly schedule is 10/9/16. For those students paid on a monthly schedule the effective date is 10/1/16.
# 25. Index

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