2024 Summer Salary: FAQs for RAs & other preparers

Updated January 30, 2024

Is this faculty member eligible?

- Presence on the Smartsheet roster indicates eligibility (unless the row has strike through formatted text), but the sheet may not have removed retirees who did not formalize retirement prior to March; they would not be eligible for July or August.
- In other instances, faculty may be on the Smartsheet but may have gone on medical leave or not in service after the sheets have been populated. If unsure, please escalate to Stephanie Tang or the faculty's academic department AP staff.

I can't find my faculty in the Smartsheet?/Why isn't this faculty member eligible?

Here are some common scenarios:

- ***Are they HHMI faculty?*** (they have a 12 month appointment through HHMI)
- ***Are they serving as Dean or holding an administrative SMG position?*** (they may not be eligible for summer salary)
- ***Are they retired?*** (talk to them about a research recall option which is not summer-specific)
- ***Are they fiscal year** faculty?*** (1 month can be requested via the FY sheet -)
  - **Eligible fiscal-year faculty may receive up to 1/11 (hired prior to 7/1/14) or 1/12 of their annual salary as additional compensation during the summer period, provided they deduct an equivalent number of accrued vacation days from their regular faculty appointment.
  - **For Academic Year faculty, each month is set at 19 working days, and for Fiscal Year faculty, we use a true FTE calculation based on the number of available working days in the month in question. Pay must be requested and processed in whole-day increments for all faculty.
  - If you are using the Excel summer salary request forms to plan a fiscal year faculty's request, please be sure to use the "fiscal year" form, which follows different calculation assumptions compared to the one dedicated to academic year faculty.
- ***Are they Adjunct or HS Comp faculty?*** *(escalate to Stephanie Tang (tangs@berkeley.edu) and Rachel Kuo (r.kuo@berkeley.edu) to add to FY sheet.)*
- ***Are they Lecturers?*** *(Lecturer summer compensation requests cannot be handled through the smartsheet, as their pay structure does not mirror the regular faculty. Lecturers need to be submitted in ServiceNow for special handling.)* If you still aren't sure why they are not in the sheet, escalate to Stephanie and Rachel.

I need access to the Smartsheet. Who should I contact?

- For access, please coordinate through your supervisor or manager.

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I need to add a new faculty member or a missing faculty member to Smartsheet. Who should I contact?

- For any additions, please contact Rachel or Stephanie.

I don't recognize the fund source that my faculty member has indicated.

- Talk to your supervisor or use the [campus Master Org tree](#) and [Phoebe Search](#) to identify department contacts for fund approval.

Are there other summer compensations to be aware of?

- 3/9th limit includes all additional compensation (executive education, summer sessions, LBNL, ERSO, etc.).

When do I need to use the summer salary request form in Excel?

- This form serves as the attestation for faculty requesting more than 47 days from federal sources. For all other requests it is an optional worksheet which may help you.

What are the 2024 locked dates of the unclaimed rows for the month of processing and any prior months?

- April 19: May unclaimed rows locked for new entries
- May 19: June unclaimed rows locked for new entries.
- June 19: July unclaimed rows locked for new entries.
- July 19: August unclaimed rows locked for new entries
- September 30: Smartsheet closes

If any locked unclaimed rows need to be unlocked for the late entry, please contact Rachel Kho (r.kuo@berkeley.edu) and Stephanie Tang (tangs@berkeley.edu). They will work with the transactional team to determine when they may unlock the unclaimed rows for you.

How do I submit a late summer salary request via smartsheet after the rows are locked?

- Please email Stephanie Tang (tangs@berkeley.edu) and Rachel Kuo (r.kuo@berkeley) so they can unlock the row (s) in the smartsheet for the entry (ies) and ensure that it is processed.
- Include the following information in the **subject line:**
    - Department Code of Summer Salary Position Control L-4 (e.g. SHIST)
    - Faculty name (e.g. John Smith) & EID
    - "Late Month (e.g. May, June, July or August) summer salary request (s)"
        - Example: SHIST, John Smith, EID 10223411, May/June/July/Aug summer salary requests

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- Include the following information in the email **description**:
  - State which month (s) and how many row (s) of each month you want unlocked.
- Once the entry (ies) are completed and approved in the smartsheet, attach the following documents to the relevant row (s):
  - Summer Salary Pay Plan Request Approved Form
  - A screenshot of the COA validation screen showing the complete chartstring validated, per [instructions](#)

Here are some additional scenarios to be aware of:

The faculty member has some of the summer paid at LBNL.
- Enter any available details in the Smartsheet so that you can watch out for overlap and remind the faculty member that they are limited to 57 days total. Select LBNL Effort from the drop down in the 'Information Only' column for any rows representing LBL-paid days.

The faculty member has ERSO days claimed
- Enter any available details in the Smartsheet so that you can watch out for overlap and remind the faculty member that they are limited to 57 days total. Select ERSO Effort from the drop down in the 'Information Only' column for any rows representing ERSO-paid days.

The faculty member is teaching in summer sessions
- Enter any available details in the Smartsheet so that you can watch out for overlap and remind the faculty member that they are limited to 57 days total. Select Summer Sessions Effort from the drop down in the 'Information Only' column for any rows representing Summer Sessions-paid days.

The faculty member has non-UC Berkeley days claimed (ex. MIT)
- Enter any available details in the Smartsheet so that you can watch out for overlap and remind the faculty member that they are limited to 57 days total. Select Other: Document in discussions from the drop down in the 'Information Only' column for any rows representing non-UCB-paid days.

How do we handle holidays if a FY Faculty wants to use 100% for July as additional summer compensation?
- Forfeit accrued vacation days for all the available working days in the month of July, except for July 4th.

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Your faculty plans to retire on July 1 with one business day break in June to qualify for the Inactive Cost-of-Living Adjustment (COLA). What is the maximum number of summer salary days the faculty can request for June?

- To qualify for the *Inactive* COLA, a UCRP member must have 1976 Tier service credit and at least one business day break prior to the July 1st retirement date.
  - For retirement on July 1, 2024, the last day worked must be no later than June 27, 2024.
    - When the last day worked is June 27, 2024, the maximum number of summer salary days that can be requested is 19 days.

Here are some Smartsheet entry tips:

- ***Access and Login to the Smartsheet Site***
  - Go to smartsheet.com and click Login.
  - Click the Company Login button.
  - Log in with your Calnet ID and Passphrase
    - * If the "Company Login" button does not appear, type in your @berkeley email address and click login (do not put in a password).
- ***Recommended Features:***
  - **Filter** to create a new filter that only has the names of the faculty you support.
    - Select: PI Name (LN, FN); is one of; choose the dropdown name

      Create New Filter
      Name (Optional)
      [Enter Name]   ☐ Share filter
      Show rows that match all conditions
      [PI Name (LN, FN) ▾] [is one of ▾] [Select values... ▾]

  - **Save** and **Refresh** *often*!
  - Set "**Alerts**" for rows that require oversight.
  - Use the "Send" vs "Update Request" functions appropriately, and respond to the update requests through the email to close the update properly.

- ***Critical Columns***
  - *Effort Type*
  - *Three Capped Fund columns*
  - *Dept Code/Region*

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- *Funding Approval Date* column MUST be entered for the row to be processed.
  - If the PI is over the cap and has funding to pay for the supplement, the *Supplement CS: Funding Approval Date, Capped Fund Y/N*, Cap Type, and *Capped Annual 12 Month Rate* columns MUST be completed.
  - The amount of the supplement to be paid should be entered in the *Supplement Paid* column, going out to 5 decimal points.
- A faculty may ONLY have one PRIMARY Dept Code/Region for the summer salary position and appointment, based on Effort Type (i.e. research vs non-research)
  - Populate Dept Code/Region on the *row* that starts with the *first* month of Effort.
    - For example, if the faculty's first Effort month starts with May, enter the Dept Code/Region using the first of the three rows available.
  - This will ensure the Dept Code/Region will populate to the future months.
  - Dept ID lookup: https://controller.berkeley.edu/accounting-and-controls/financial-reporting/chart-accounts/organization-tree-reports. Please use the Production-based tree reports on this page (heading 2) which is more up-to-date.

Here are some additional processing tips:

- Smartsheet is the tool for communication.
- Research Administrators to coordinate with individual faculty and their peers, and enter requests in the Smartsheet workspace.
  - If PI has multiple funding sources from other units, RA handling a PIs request will lead the coordination with those units.
- Clients without RA support will have staff work directly in the workspace.
- Research Administrators/Financial Analysts and other Preparers required columns are noted in "blue" color shown below:

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# DAYS	Effort Type	Capped Fund Y/N	Cap Type	Capped Annual 12 Month Rate	NSF Fund Y/N	FED Fund Y/N	Busin... Unit	Account	Fund
Funding Approve	Funding Approv	Funding Approve	Funding Approver	Funding Approver	Funding Approver	Funding Approver	Funding Approve	Funding Approver	Funding Approver
10.0000	Resear	Y	NIH - EL II 1/5/20 - $19	$197,300.00	Y	Y	1	50200	45678