



UNIVERSITY OF MARYLAND

OFFICE OF EXTENDED STUDIES

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To: Departmental Summer Session Coordinators and Business Contacts

From: Terrie Hruzd, Director, Programs & Marketing-Communication
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Date: February 2023

Subject: Summer Session Budgeting, Faculty Contracting, and PHR/Payroll Instructions

The Office of Extended Studies (OES) continues preparation for Summer Session 2023 (SS23). Enclosed are instructions for preparing Summer Session course budgets and completing faculty contracts and PHR/payroll. Listed below are important deadlines.

Feb 27	Departments begin to enter proposed course budgets.
April 10	Departments complete course budgets in the online course proposal screen and submit for college approval.
April 17	Colleges approve summer course budgets and submit the electronic course proposal screen to OES for final approval.
April 24	OES deadline to review and approve final online course proposal budgets.
May 9	Departments record and retain OES instructional contracts for Summer Session I (SSI) and the two three-week sessions in SSI for faculty and graduate assistants working as lecturers.
Jun 6	Departments record and retain OES instructional contracts for Summer Session II (SSII) and the two three-week sessions in SSII.
Aug 21	Departments submit summer course-related expenses for reimbursement from OES.

For Summer Session, six-week session instructional staff receives **two** bi-weekly payments. Three-week session instructional staff receives **one** payment. A schedule of 2023 pay dates appears in the [Summer Session Pay Dates](#) section of the enclosed instructions. In addition, the pay date schedule is printed within the instructor's summer appointment contract.

If you have any questions concerning the processes, contact our finance staff at oes-finance@umd.edu.

Thank you for your assistance.

cc: Associate/Assistant Deans, Department Chair

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Summer Session 2023 Budgeting, Faculty Contracting, and PHR/Payroll Schedule

Phase II Calendar: Electronic Budgeting, Faculty Contracting, & PHR/Payroll, Summer Session 2023			
Summer Session Registration / Session Start Dates	I, I-A & I-B	II, II-C & II-D	RESPONSIBILITY
Summer Session registration begins.	Tuesday February 21, 2023		
Summer 6-Week & 3-week Sessions begin/end dates	I: May 30- July 7, 2023		
	I-A: May 30 - June 16, 2023		
	I-B: June 20 - July 7, 2023		
	II: July 10 - August 18, 2023		
	II-C: July 10 - July 28, 2023		
	II-D: July 31 - August 18, 2023		
Task Description: Course Budgeting	DUE DATE		RESPONSIBILITY
Begin entering course budget data.	Monday February 27, 2023		Department
Deadline to use Teacher Collect to input instructor changes. After this date, submit all instructor changes to summer-sched@umd.edu .	Monday February 20, 2023		Department
Deadline to complete course budgets in the <i>OES Budgets and Contracts system</i> and submit course <i>Budgets</i> screens to the colleges for approval.	Monday April 10, 2023		Department
Deadline to approve course budgets and submit the course <i>Budgets</i> screens to OES for final approval.	Monday April 17, 2023		College
Deadline to approve departmental course budgets.	Monday April 24, 2023		OES-Finance
Task Description: Overload Approvals	DUE: I, I-A & I-B	DUE: II, II-C & II-D	RESPONSIBILITY
Begin routing, via email, overload approval requests (if applicable)	Monday April 24, 2023		OES-Finance
Deadline for Instructor's immediate Supervisor listed in PHR appointment for Overload Approvals. Upon receipt of supervisor approval, departments must forward approval email to OES and OES will process PHR appointments.	Monday May 15, 2023		Department
Task Description: PHR/Payroll Appointments	DUE: I, I-A & I-B	DUE: II, II-C & II-D	RESPONSIBILITY
Deadline for department to process non-paid appointment for adjunct instructor. In order to obtain ELMS and SIS access, this appointment must be completed.	Friday April 28, 2023	Friday May 26, 2023	Department

Task Description: PHR/Payroll Appointments	DUE: I, I-A & I-B	DUE: II, II-C & II-D	RESPONSIBILITY
Deadline to complete-Faculty, TA, and Labor (hourly) Assistants' employee demographics (including Visa screen, if applicable) and degree screens in PHR. For "new", "initial", and returning faculty, complete employee Information, demographic screen, and education, and email address in PHR. For employees with J1 or H1 VISA, complete employment history, and create and route the J1 or H1 visa transaction.	Friday April 28, 2023	Friday May 26, 2023	Department
Deadline to submit PHR Appointment Transmittal forms for student/hourly employees and teaching assistants via email attachment to oes-finance@umd.edu .	Friday May 5, 2023	Friday June 9, 2023	Department
Deadline to complete PHR appointments.	Monday May 15, 2023	Monday June 12, 2023	OES-Finance
Deadline to submit original tax forms for new employees to Payroll Services. Current employees with W-4 changes must also submit by this date.	Friday May 5, 2023	Friday June 9, 2023	Department
Task Description: Faculty Contracts	DUE: I, I-A & I-B	DUE: II, II-C & II-D	RESPONSIBILITY
Deadline to record online faculty contract signatures in the electronic faculty contract system. Signed contracts are retained in department files.	Monday May 29, 2023	Monday July 10, 2023	Department
Task Description: Low Enrollment	DUE: I, I-A & I-B	DUE: II, II-C & II-D	RESPONSIBILITY
2-week Low Enrollment Report	Wednesday May 17, 2023	Wednesday June 28, 2023	OES-Finance
1-week Low Enrollment Report	Wednesday May 24, 2023	Wednesday July 5, 2023	OES-Finance
Deadline to email summer-sched@umd.edu to cancel low enrolled course. If low-enrolled course is offered, the college is responsible for absorbing the overall loss to the department.	Thursday May 25, 2023	Thursday July 6, 2023	Department
Task Description: Course-Related Expense Reimbursements	FINAL DUE DATE		RESPONSIBILITY
Deadline to submit invoices and expenses for reimbursement to OES. OES will not accept or process Summer Session expense reimbursements received after this date.	Monday August 21, 2023		Department

Summer Session Pay Dates

Standard Summer Session Sessions and Payroll Dates					
Session Code	Term	Session Date	Session Length	Payroll Dates**	Pay Period ***
SI	2305	May 30 - July 7*	6-Weeks	June 23 & July 7	26 1
SI-A	2305	May 30 - June 16	3-Weeks	June 23 &	26
SI-B	2305	June 20 - July 7*	3-Weeks	July 7	1
SII	2307	July 10 - August 18	6-Weeks	July 21 & August 4	2 3
SII-C	2307	July 10 - July 28	3-Weeks	July 21 &	2
SII-D	2307	July 31 - August 18	3-Weeks	August 4	3
*The University is closed June 19 in observance of Juneteenth and July 4 in observance of Independence Day.					
**The University has mandated that, in PHR, Summer Session bi-weekly pay periods must fall between the last spring semester pay period (Ppd25) and the first fall semester pay period (Ppd04).					

Faculty Contracting Guidelines

Faculty contracts are either enrollment-contingent, non-contingent or no cost.

A. Contingent Contracts

Enrollment must be sufficient to pay the instructor and, if assigned, TA salaries plus the OES administrative charge.

In the event necessary enrollment for full salary is not realized, the instructor will teach the course for 80% of tuition received.

If there is insufficient course revenue, the instructor agrees to teach the course for compensation equal to 80% of the tuition revenue collected, not to exceed the original salary. When employing a TA and enrollment is insufficient to cover instructor and TA salaries, as well as the per seat administrative charge combined, then only the instructor salaries are paid at the contingent contract rate of 80% of the tuition received. TA and student labor salaries are paid in full. If student enrollment increases or declines between the two pay dates listed in Sessions I and II, a salary adjustment will appear in the second bi-weekly paycheck.

OES will use the following dates in determining session enrollments for calculation of contingent salary:

Session Code	Session Date	Payroll Check Issue Dates**	Pay Period #**	Contingent Salary Calculation Date
I	May 30 - July 7*	June 23 & July 7	26 1	June 09 June 23
I-A	May 30 - June 16	June 23 &	26	June 9
I-B	June 20 - July 7*	July 7	1	June 23
II	July 10 - August 18	July 21 & August 4	2 3	July 11 July 21
II-C	July 10 - July 28	July 21 &	2	July 11
II-D	July 31 - August 18	August 4	3	July 21

B. Non-Contingent Contracts

Non-contingent contract stipulation: the instructor will be paid the full contracted salary regardless of course income. The college dean/department head determines whether an instructor is paid on non-contingent contract during the Summer Session. Please follow your college policies regarding any approval procedures.

If the instructor agrees to teach only at full compensation and the dean/department head agrees to this condition, the instructor enters into a non-contingent contract and receives their full salary regardless of course income.

If the course income is insufficient to cover the cost of the course (the instructor's full salary and TA salary, plus fringe benefits and supplies costs, plus the per seat administrative charge), the department is liable for the full deficit for the course.

C. No-Cost Contracts

All instructors, including those instructors whose salaries are not budgeted in the Budgets screen, receive an instructional agreement from OES which must be signed prior to the first day of class. This includes 12-month appointees who are teaching on-load in a summer session.

No cost contracts should only be issued in rare situations where the instructor cannot receive payment for course instruction. No cost contracts are used only for an instructor who is not permitted to earn instructional compensation (for example, restrictive Federal Government employees who are required to teach a course but who are not permitted to receive compensation).

Departments do not budget an instructor salary within the *OES Budgets and Contracts System*, and will leave the *Section Salary* field blank in the **Budgets** screen. Instead, they add a detailed note to the Notes screen, and change the contract type to "No Cost" under the "Edit" button. Once the contract type is updated, a "No-Cost Contract" will be generated for instructor signature, outlining instructor and OES

responsibilities with regards to course delivery. This contracting process is required to confirm all instructor assignments in OES-managed courses. **Instructors teaching *independent study* courses on-load will not be issued this contract.**

The department will collect the instructor's signature on the no cost contract and record the signature in the *OES Budgets and Contracts System*. The department should keep a copy of the signed contract in their business office. OES maintains a record that the contract was signed through the *Contracts* screen.

Faculty Budgeting Guidelines

Summer Session faculty salary is based on the faculty member's contract for FY2023. The OES guideline for faculty salary is 10% of their 9-month salary for a three-credit course. However, departments have the discretion to pay faculty less than the standard 10% of the 9-month salary for a 3-credit course.

A. Salary Rates per Course Credit

The following chart lists the percentages used to calculate summer salaries by the number of course credits taught. If the instructor's annual salary is less than 100% full-time, the salary must be converted to 100% before calculating the Summer Session salary.

Course Credits	Percentage of 9-month, 100% FTE Salary
1	3.33%
2	6.67%
3	10.00%
4	13.33%
5	16.67%
6	20.00%
7	23.33%
8	26.67%
9	30.00%

To calculate the 9-month equivalent amount:

1. Convert the 12-month salary to 9 months:

$$\frac{\text{Full 100\% FTE, 12-month Salary} \times 9}{12} = \text{9-month Converted Salary}$$

2. Multiply the 9-month converted salary by the summer salary rate chart below.

For 12-month faculty less than 100% full-time, convert the current percentage to 100% then calculate the summer salary as above.

Salary computations must be exact and **not rounded off**. The salary entered in the electronic course proposal form must exactly match any required Summer Session PHR appointment.

If the department changes an instructor assignment following the approval of the course budget, email summer-sched@umd.edu to process the instructor change in the Student Information System (SIS), and copy oes-finance@umd.edu, the department chair, and college when the salary exceeds the original estimate or the stipulated percentage of the appointee's salary.

B. Teaching Assistants Appointed as Summer Lecturers

If a graduate student or teaching assistant is assigned complete responsibility for all aspects of a course, the title of Lecturer is assigned for the duration of the appointment. The following process must be completed:

1. Full-time and part-time, 12-month Graduate Assistants who receive a summer salary in addition to their Graduate Assistantship stipend must have an approved Graduate Student Overload Assignment Request form and a teaching overload in PHR.
2. An electronic Summer Appointment Contract (contingent or non-contingent) must also be completed.

The 2023 pay rates for teaching assistants appointed as summer lecturers are based upon the individual teaching assistant level for the preceding 9 months. Step III requires advancement to doctoral candidacy. The salary scale is as follows:

TA Step	Summer Lecturer Maximum Salary*
I	\$5,124.02
II	\$5,712.82
III	\$6,300.52
*Per 3-credit course. Adjust as needed for the number of credits taught.	

C. Lecturers (Including Adjuncts)

The maximum stipend for a 3-credit course will be the greater of 10% of the FY23 base salary or the stipend from the TA salary table above based on individual's teaching experience and graduate student status.

D. Assistant Professors

The maximum salary of a 9-month assistant professor who teaches a 3-credit course in Summer Session 2023 will be ten percent (10%) of the FY23 base salary or \$5,912.31, whichever is greater.

E. Twelve-Month Professors and Lecturers

Twelve-month faculty who teach a summer session on-load with salaries budgeted in the *Budgets* screen of the *OES Budgets and Contracts System* will have the equivalent percentage of the 9-month portion of their salary transferred to the department. This is subject to the contingent contract stipulations found in [Contingent Contracts](#).

Twelve-month faculty who teach a summer session **with** overload approval, and who are on a non-contingent contract will be paid the equivalent percentage of the 9-month converted salary. If on contingent contract, twelve-month faculty will be paid the equivalent 9-month converted salary if the contingent stipulations are realized. If contingent contract stipulations are not realized, faculty on contingent contract will be paid 80% of the tuition received.

Teaching Assistant Budgeting Guidelines

TAs are paid a stipend that is based on the TA salary for the preceding academic year. TAs may also receive up to 8 credits of tuition remission depending on their academic year and summer status. See below for [tuition remission guidelines](#). Summer Session 2023 stipends are as follows:

TA Step	Summer Session Full-Time TA Stipend
I	\$3,708.01
II	\$4,453.16
III	\$5,193.88

TA positions must be requested and approved in the department *Budgets* screen; the department may elect to divide these assignments among more people as long as the total payments do not exceed the originally specified stipend in each case. For example, if one TA step I was authorized, the full-time (50%) stipend would be \$3,444.99. If four people are assigned to share this allocation, each will receive \$861.25. However, the tuition remission would be only two credits each. The department will be responsible for assigning an equitable distribution of duties in such cases.

Due to auditing requirements for reporting total costs per course and section, departments must indicate course and section assignments for each TA. TAs may not be treated as “floating” personnel. OES will email PHR Transmittal forms to all departments with TAs budgeted; upon completion, forward the transmittal form to the OES Finance team at oes-finance@umd.edu.

Additionally, departments must send a request to summer-sched@umd.edu to add the TA to the “teacher collect” screen for course access purposes.

Student Hourly Labor Budgeting Guidelines

Students and/or hourly-paid appointees are appointed in PHR the same as any other appointment. The department must enter the demographic data for each student/hourly-paid appointee in PHR, then submit a Student/Hourly Employee PHR Appointment Transmittal form. OES will email PHR Transmittal forms to all departments with labor budgeted; upon completion, the department forwards the transmittal form to the OES Finance team at oes-finance@umd.edu. Additionally, departments must send a request to summer-sched@umd.edu to add the student/hourly employee to the “teacher collect” screen for course access purposes.

If the student/hourly rate exceeds the maximum established by University Human Resources, the department must submit a Student Wage Exemption Form, located at <https://uhr.umd.edu/forms/>, to Human Resources and attach a copy to the PHR Transmittal form. The FY23 maximum rate for hourly student workers is as follows:

Student Status	Maximum Stipend
Undergraduate	\$20.00
Graduate	\$25.00

If a department wishes to hire student labor for any summer session, departments must request labor costs in the *Budgets* screen for Summer Session 2023. Departments must track labor costs to ensure that enough funds are available in their labor budget to cover labor expenses.

Time entry for student/hourly paid appointees will be made in the PHR Time Entry system and approved by the supervisor of each unit within the department. The University’s payment schedule for student/hourly appointees is two weeks behind the regular employee pay date. Should there not be enough funds available in the department’s labor cost budget to cover the hours presented, OES will contact the department to discuss the re-allocation of budgeted items in order to pay the student/hourly appointee.

Due to auditing requirements for reporting total costs per course and section, departments must indicate course and section assignments for each student hourly worker. Student hourly workers may not be treated as “floating personnel”.

Overload Appointments and Contracting Instructions for Faculty and Graduate Assistants

The following chart lists all faculty and graduate assistant Summer Session appointment types processed through PHR's tiered routing environment. **Note: OES processes all Summer Session payroll appointments for instructional staff assigned to OES-managed courses.**

Appointee Type	PHR Overload Appointment for Tiered Routing Approval	Department Generates OES Instructional Contract in Budgets and Contracts System
Full- and part-time FACULTY and GRADUATE ASSISTANTS working as Lecturers		
Current 9-, 9.5- and 10-Month full-time faculty	No	Yes
Current 12-Month full-time faculty	Yes*	Yes
Current Part-time and adjunct faculty	No	Yes
Current 9-, 9.5- and 10-Month full- or part-time graduate assistants working as Summer Session lecturers	No	Yes
Current 12-Month, full-time graduate assistants working as Summer Session lecturers	Yes**	Yes
Current 12-Month, part-time graduate assistants working as Summer Session lecturers	Yes**	Yes
Current 9-, 9.5-, 10- and 12-Month faculty - salary to be transferred back to department	N/A	Yes
Full- and part-time 33-EXEMPT REGULAR APPOINTEES working as Summer Term Lecturers or TAs		
Current 33-Exempt Regular appointees working as Summer Term lecturers	Yes***	Yes
Current 33-Exempt Regular appointees working as Summer Term TAs	Yes***	No
Full- and part-time GRADUATE ASSISTANTS working as Summer Term TAs (a non-teaching assignment)		
Current 9- and 9.5, 12 Month part time and full-time graduate assistants working as Summer Term TAs less than 20 hours per week	No	No
Current 12-month part-time and full-time graduate assistants working as Summer Term TAs up to 40 hours per week	Yes**	No
*Departments obtain supervisor overload approval via email template (see template below)		
** Submit a copy of the completed Graduate Student Overload Assignment Request form to OES at oes-finance@umd.edu .		
*** Submit a copy of the completed Overload Authorization form to OES at oes-finance@umd.edu .		

A. Faculty Overloads

For **faculty appointees**, departments obtain supervisor approval via email using the template below and forward it to OES Finance at oes-finance@umd.edu so that the appointment may be entered into PHR.

(Instructor's immediate Supervisor listed in PHR appointment),

I am requesting an overload approval for _____ (name and UID # _____), a _____ (title) _____ with a _____ (type of appointment) _____ appointment in the Department of _____, for the Summer Session course _____ during Summer 2023. Your positive response will serve as your approval for this overload. The overload payment for this course will be \$_____ and will be processed by the Office of Extended Studies in the University's PHR system. This overload payment is for an assignment that is not a part of _____'s regular duties. In forwarding this request, _____ and his/her/their supervisor mutually acknowledge and agree that (1) the employee has permission to work on an overload basis; (2) performance of the overload duties will not occur at time periods during which the employee performs his/her/their regular duties; (3) performing this overload will not otherwise interfere with the performance of the employee's regular duties. Please indicate your permission for _____ to teach this course by replying to this email by _____ (date) _____.

Thank you for your consideration. Please contact me at (301) _____ or _____@umd.edu if you have any questions or concerns.

For **33-Exempt Regular appointees**, departments obtain supervisor approval using the appropriate template found on <https://uhr.umd.edu/forms/> or the above template. 33-Exempt Regular appointees working as Summer Session *lecturers* should use the [Overload Authorization \(Teaching\)](#) form, and those working as Summer Session *TAs* should use the [Overload Authorization \(Non-Teaching\)](#) form. Once approved, departments forward the completed form to OES at oes-finance@umd.edu so that the appointment may be entered in PHR.

Faculty members may teach Summer Session courses off-load (on approved overload), provided that doing so does not interfere with the instructor's regular duties. If the summer instructor is employed by a Maryland state agency or other institution in the University System of Maryland, the instructor must obtain written approval from his/her supervisor to teach. OES will enter the approval information in PHR in the Overload Duties and Justification section of the Appointment Summary screen.

OES must receive all electronic overload approvals by the deadlines listed in the [Summer Session 2023 Budgeting, Faculty Contracting, and PHR/Payroll Schedule](#) above. Per the Provost's directive, OES will cancel summer courses that do not have instructor overload approval in PHR by the deadline.

PHR and Overload appointment instructions are available online at: <http://www.provost.umd.edu/pers-bud/ARS/ARSUpdates/>.

B. Graduate Assistant Overloads

Graduate Assistants with 12-month appointments working off-load as Summer Session (1) lecturers or (2) teaching assistants working up to 40 hours per week must have an approved overload prior to the start of Summer Session. Departments obtain approval using the [Graduate Student Overload Assignment Request](#) form. Once approved, departments forward the completed form to OES at oes-finance@umd.edu so that the appointment may be entered in PHR.

PHR/Payroll Instructions

The department is responsible for entering or updating the demographic, degree, and I9 Profile ID data in PHR for **all new appointees and current appointees**. **OES cannot process payment appointments unless the department completes/updates the PHR demographic, degree, and I9 profile ID screens.** If the appointee does not have a current active appointment, the department also must process a **non-paid appointment** so that the appointee can be entered into SIS. This in turn will allow the appointee to obtain access to ELMS and other university resources.

The department obtains and provides the I-9 profile ID for new/adjunct instructors, new/adjunct GA and new labor assistants. This information is required so that OES can build the PHR appointment.

- For instructors, include the I-9 profile ID in the notes section of the OES Budgets and Contracts system Budgets screen for the appropriate course prior to submitting the budget to the next approval level.
- For TAs and Labor assistants, provide the I-9 profile ID in the I-9 column of the transmittal form.

A. Payroll Tax Withholdings

Submit both original tax forms to Payroll Services by the due dates found in the PHR/Payroll Schedule on page three of these instructions. Any payments processed by the State's Central Payroll Bureau (CPB) prior to the entry of the tax forms into the Payroll System will be taxed according to the tax forms on file at CPB or, in the case of a new hire, have the maximum amount of taxes withheld. Refunds of "over-taxing" due to late submission of the tax forms will not be possible.

When salaries are paid over one or two pay periods as they are in the Summer Session, it is important to note that Federal and State payroll taxes are withheld at a higher rate than salaries paid over an academic semester or year. **PHR/Payroll Services cannot segment the number of bi-weekly pays over more pay periods than the actual pay dates for Summer Session to reduce tax withholdings.**

Visit the [CPB website](#) to obtain blank tax forms, find instructions for completing the forms, and access the *Net Pay Calculator* to estimate the amount of taxes that will be withheld.

B. Instructions Regarding Salary Overpayments

Upon receipt of bi-weekly payroll checks/earnings statement to summer employees, each department payroll person must verify that the gross payment received is correct and should alert OES to any discrepancies. It is also the responsibility of the employee to review their paycheck/earnings statement upon receipt and contact the department if any variance is noted.

In the event that an employee is overpaid during the summer, that employee will return/reimburse all overpayments immediately to the University. If the employee is unaware of the overpayment at the time, they are still responsible for refunding the full amount, less any taxes withheld, immediately upon receiving notification of the overpayment. If the employee is to receive future wages, the gross amount of the overpayment must be recovered via an “overpayment recovery” pay adjustment. If the employee is not going to receive wages in the immediate future, a net payback amount should be requested from the University’s Payroll Services. Checks should be made payable to: Treasurer, State of Maryland and forwarded to Payroll Services.

C. Guidelines for Summer Time Report Records

If a faculty member is 9-month (22 pay) and they teach during any of the summer sessions, accrued sick leave for the session that they are teaching will automatically be accrued in the PHR Faculty Leave Reporting System.

Summer Session Tuition Remission Entitlements

Position	Fall 2022 & Spring 2023 Employment Status	Summer Session 2023 Employment Status	Tuition Remission Eligibility
GA	12 mo., part- & full-time	Not needed to be eligible	1-8 credits
GA	9.5 mo., part- & full-time	Not TA or Lecturer	0 credits
GA	9.5 mo., part- & full-time	TA	1-8 credits
GA	9.5 mo., part- & full-time	Lecturer	0 credits
Summer Only Lecturer	N/A	Lecturer	0 credits

This is the total credit eligibility for the entire Summer Session, not each session. Graduate assistants may use their credits in any summer session regardless of the session in which the appointment occurs.

OES does not pay tuition remission for graduate assistants appointed as summer lecturers.

Tuition remission guidelines for **all** eligible employees, dependents, and retirees can be found at <https://uhr.umd.edu/benefits/tuition-remission/>.

Instructions Support/Expense Items

Instructional support and expense items include teaching assistants, labor, material, rental funds, and the like **as required specifically to support courses and programs** offered during Summer Session.

Departments must show dollar amounts for each category for each course and section on the online form. Attach details supporting each expense item on the “Notes” screen. For travel requests, include the destination, purpose, time and cost. This detail is required for each individual trip.

Also, please note that unspent funds from one session cannot be applied to another session without special permission from OES. Additionally, authorization to spend funds for summer activities is not a budget allocation. Departments will not transfer or use funds to support other departmental priorities.

OES will review all requests for department support above the cost of individual courses in the context of the overall summer program proposed for 2023 along with the Results of Operations from 2022. Departments must fully justify these requests in the online “Notes” screen.

Procurement orders, travel card, purchasing card and OfficeMax/Rudolph charges will be paid by the department account and then forwarded to OES for reimbursement. **Departments do not charge OES accounts directly. The deadline for submitting Summer Session 2023 invoices and expenses for reimbursement is found in the [Summer Session 2023 Budgeting, Faculty Contracting, and PHR/Payroll Schedule](#) above.** OES will not accept expense submissions after this date. Also, note that OES will not reimburse invoices in excess of the approved Summer Session 2023 budget.

Provide a cover letter listing *course numbers and sections* and their related charges with copies of paid receipts. OES will not reimburse instructional support items as *general* Summer Session expenses. Items which have a useful life beyond the course, such as computers, printers and the like cannot be submitted for reimbursement.

Send the course-related instructional expense reimbursement request to:

Mail: Office of Extended Studies
OES Finance Team
Suite 0600, Service Building
7757 Baltimore Ave.
College Park, MD 20742

Email: oes-finance@umd.edu

Appendix A: Number of Students Needed for Full Salary Payment on Contingent Contract

Number of Students Needed for Full Salary Payment: Use this formula to calculate how many students must register before a faculty member on contingent contract will receive a full salary:

$$\frac{((\text{Faculty Full Salary} + \text{TA Salary}) \times \text{Fringe Rate})}{((\text{Number of Credits} \times \text{Credit Rate}) - \text{OES Administrative Cost})} = \frac{\text{Total Seats Needed to Pay Full Faculty Salary}}{\text{Full Faculty Salary}}$$

Tuition per Credit Rate**:	\$404 Undergraduate, Resident	\$811.90 Graduate, Resident
	\$1,581 Undergraduate, Non-resident	\$1,769.38 Graduate, Non-resident

*****Please note that tuition rates are subject to change.***

*****Please note that Fringe Rates vary by group. It is 7.7% for the Legislated Benefits, 27.8% for the Limited Benefits Group, 29.7% for the Faculty Group or 36.0% for the Staff Group. For Summer Session most instructional cost will be at the 7.7% rate; however, rates may be higher for Salary transfers.***

For example purposes we are using 7.7%.

Fringe Rate: 7.7%, (.077)

OES Administrative Cost: \$140 per Seat

Example: Assume course expenses that include a lecturer full salary of \$5,124.02 and TA salary of \$3,708.61 with course revenue of three credits at the undergraduate, resident credit rate less the per seat-administrative cost:

$$\frac{((5,124.02 + 3,708.61) \times 1.077)}{((3 \times 404) - 140)} = \frac{9,512.74}{1,072} = 9 \text{ Students (rounded up)}$$

Appendix B: Break-even Enrollment Formula for Full Salary Payment on Contingent Contract

To determine the number of seats needed to cover all course-related expenses (faculty, TA and student labor salaries (including fringe benefits), course supplies & materials, and OES administrative costs) use the following break-even enrollment formula:

$$\frac{(((\text{Faculty Full Salary} + \text{TA Salary} + \text{Labor Salary}) \times \text{Fringe Rate}) + \text{Supplies})}{((\text{Number of Credits} \times \text{Credit Rate}) - \text{OES Administrative Cost})} = \text{Total Break-Even Enrollment}$$

Tuition per Credit Rate**:	\$404 Undergraduate, Resident	\$811.90 Graduate, Resident
	\$1,581 Undergraduate, Non-resident	\$1,769.38 Graduate, Non-resident

*****Please note that tuition rates are subject to change.***

*****Please note that Fringe Rates vary by group. It is 7.7% for the Legislated Benefits, 27.8% for the Limited Benefits Group, 29.7% for the Faculty Group or 36.0% for the Staff Group. For Summer Session most instructional cost will be at the 7.7% rate; however, rates may be higher for Salary transfers.***

For example purposes we are using 7.7%.

Fringe Rate:	7.7%, (.077)
OES Administrative Cost:	\$140 per Seat

Example: Assume course expenses that include a lecturer full salary of \$5,124.02 and TA salary of \$3,708.61, labor salary of \$1,000 and supplies of \$250 with course revenue of three credits at the undergraduate, resident credit rate less the per seat administrative cost:

$$\frac{(((5,124.02 + 3,708.61 + 1,000) \times 1.077) + 250)}{((3 \times 404) - 140)} = \frac{10,839.74}{1,072} = 11 \text{ Students (rounded up)}$$

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