Summer Spreadsheet Process Instructions

Below are the instructions on how to use spreadsheet template that is required when submitting Summer Teaching/Research requests for 9-month employees to the HR Service Center.

To ensure timely processing and position set up for June appointment start dates please submit your spreadsheets to HRSupportServices@oregonstate.edu or through the Employee Service Portal no sooner than May 1.

When submitting your spreadsheet please use the following subject line: Summer Session Spreadsheet [College], [Department].

Submit corrections/revisions on your initial spreadsheet. Please utilize the *Corrections Tab* at the bottom of the spreadsheet to list the requested corrections/revisions. Use the *Notes* section of the spreadsheet to provide additional information or clarification about the requested corrections. Submit corrections in the Employee Service Portal or to HRSupportServices@oregonstate.edu.

Instructions for completing the spreadsheet are indicated below. If you need assistance with any section, column or cell in the spreadsheet, please send an email to HRSupportServices@oregonstate.edu:

- Org Code: 6-digit code that defines your unit, ex: 251400 (Chemistry)
- Dept Name: Name associated with the Org Code. Example: Chemistry
- Employee Name: First and Last Name (as it should appear on a Summer Academic Wage Offer Letter (or reappoint letter))
- ID #: OSU ID number of employee
- Rank: For Academic Faculty this matches their Job Title. Ex: Professor
    - For Professional Faculty, enter No Rank
- FT Annual Salary: This is the employee's salary rate at the end of Spring Term
    - If the employee did not work Spring Term, enter the Annual Salary from when the employee last worked
    - Note – The minimum annual salary rate for a full-time 9-month Instructor is $43,002
- FT Monthly Salary
    - No entry required here; this cell auto-calculates based on FT Annual Salary
    - Formula for calculation is FT Annual Salary/Basis
        - E.G. 103,158/9=11,462
- Start Date: Any date after 06/16/YY of the current year
- End Date: Any date before 09/15/YY of the current year
- FTE: Insert the FTE if the employee will be paid on an FTE basis, EX: 1.00
    - If the employee will be paid a Lump Sum amount, do not enter an FTE
- Lump Sum: Enter the Lump Sum amount that you are paying the employee for their service.
    - This is often done on Instructor positions
- Actual Monthly Salary
    - No entry required here; this cell auto-calculates for FTE appointments
    - Formula for calculation is FT Annual Salary/Basis*FTE
        - E.G. 103,158/9*1.0=11,462
    - Lump Sum appointments will show as 0

- Basis: enter 9
  - If you are attempting to pay a 12-month employee for summer session, please contact HRSupportServices@oregonstate.edu for further instruction.
- Max Summer Pay
  - No entry required here; formula set up to calculate
  - Formula for calculation is FT Annual Salary/Basis*2.5
    - E.G. 103,158/9*2.5=28,655
  - NOTE: 9-month academic faculty members paid from gifts, grants or contract may budget a maximum of 3.0 months summer salary if allowed by the gift, grant or contract and approved by the department chair/head and dean. A maximum of 2.5 months summer salary is allowed on E&G funding. Payment in excess of 2.5 months summer salary on E&G funding requires written pre-approval by Faculty Affairs. See FAQ – "How will request for Summer Pay over 2.5 months' salary be processed this year".
- Index: Enter the Index the position will be paid on (if multiple indexes, use multiple lines or note in Notes section the various indexes)
- Activity Code: Enter if an Activity Code is needed for the Index
- % Of Pay on Index: If only one index is used, enter 100
  - If multiple indexes are used, enter the appropriate percentage for each index
- Instruction/Research: is this position teaching or doing research or other work?
- Supervisor: Enter name of supervisor for position
- Supervisor ID #: Enter supervisor's ID number
- Supervisor Position Number: Enter supervisor's position number
- Course ID(s) OR Duties (e.g., research): tell us what they will be doing. This information is used for the Offer Letter/Reappoint Letter issued to the employee
- Summer Position Number: This can be pulled out of CORE: Pool Positions (HRS1450)
  - Select for your Business Center
  - Reports to ORG: Select for your Home Org Code
  - Position Status: Active
    - Enter View Report
    - View Summer Academic Wage position numbers in the report. These position numbers begin with "C2" and include "Summer" in the position title.
    - Summer Instruction typically start C29
    - Summer Research typically start C28
- Job Location: Where will the employee be located? If they are in Corvallis, list Corvallis, if they are out of the area list their City & State
- Graduate Student: Y/N – If you are hiring a graduate student for summer session, please contact hr.gradassistants@oregonstate.edu for options.
- Notes: Any additional information that would be helpful to process this request
- UHR Use Only Section– This section will be completed by the Service Center. Once spreadsheets are completed, HR Service Center will prepare offer letters and submit to department for signature. To view additional deadlines, FAQs, help session dates and detailed information on this process, please visit the Summer Session Appointment Process Website. If you have additional questions, please send an email to HRSupportServices@oregonstate.edu.