



Summer Session EPAF Guidelines – Summer 2025

Summer Session Dates: May 11, 2025 – August 16, 2025, 7 bi-weeks, 14 weeks, 560 total hours

What is summer session?

Summer session is pay for faculty responsibility areas for those currently not on contract (i.e., academic year faculty and temporary faculty). Faculty responsibility areas include work designated in effort areas of teaching, research, outreach, and service. Additional examples of responsibilities include course development, advising and administration.

Summer session contracts required through SoftDocs.

Training and instructions on the summer salary contract process will be sent to the Fiscal Officers.

- Please submit and receive approval from the Provost Office prior to submitting EPAFs.
- Per working with OSP and Provost Office, be aware of the “Percent of Effort” when putting on Sponsored Project summer EPAFs.
- Sponsored Project Questions? – email osp@uidaho.edu
 - The **percent of effort** is part of the submitted proposal in VERAS. VERAS documents are where the PI and Co-PI propose their percent of effort which may also be called person-months effort. The effort can also be calculated by a # of hours in the budget or proposal narrative and should be reflected in the agreement that funds the project. The faculty should be able to provide the unit with the percent of effort; otherwise, the DGA (Departmental Grant Administrator) should be able to provide this information
<https://www.uidaho.edu/governance/policy/policies/apm/45/09>



Teaching, Administrative, Course Development and Other Work

Position Number and Suffix:

- Use **PCN 009965** with **.03** as the suffix. If an employee has 2 summer appointments running concurrently (e.g., within the same session) you can use .13, .23, etc. as needed.

Summer **Teaching, Administrative, Course Development and Other** appointments (**non - OSP sponsored activity**) can be paid as a lump sum payment over the summer session(s) worked, using EPAF's similar to additional compensation EPAF's.

Summer Session Lump Sum EPAFs:

EPAF categories: Please check NBAJOBS before selecting which category to use.

Use January 1, 2009, as Query Date for Summer Session job history.

***Use of these categories are for non – OSP sponsored activity. Research appointments on OSP sponsored activity must be processed on research summer categories (see page 5.)**

SSOLMP: Teaching original appointment (New to UI. First appointment at UI.)

SSRLMP: Teaching reappointment, previous PCN and Suffix

SSRLMN: Teaching reappointment, new PCN and Suffix

SSALMP: Teaching additional appointment, previous PCN and Suffix.

******(Use when they have a primary academic faculty position and have been on PCN and Suffix 009965.03 previously.) *******Please use for Retiree's who have been on 009965.03.

SSALMN: Teaching additional appointment, new PCN and Suffix.

******(Use when they have a primary academic faculty position but have NOT been on PCN/Suffix 009965.03 previously.) *******Please use for Retiree's who have NOT been on 009965.03.

Summer session change categories:

GLBDST: To change labor distribution only.

STMJOB: Summer Session Termination of Job. Use to terminate a summer session appointment before the termination date in the system (earlier than what is originally planned.)

SCHPAY: Summer change of pay (hourly rate, annual salary, pays, factors and labor distribution.)

SMSCCH: Summer misc. change (FTE, hours per day and pay, rate, salary, pays, factors, and labor distribution.)

EXAMPLE ONE: Teaching, Administrative, Course Development and Other Work (Lump Sum)

Olivia Wilde, an active UI Academic Faculty members Annual Salary (Institutional Base) = \$54,008.60

Total Working Time Period: May 11 – June 21 = 6 weeks = 3 pays and factors

Paying \$6,000 for Summer Classes: Accounting 101 and 102

Maximum Summer Salary

$\$54,008.60 / 1560 = \$34.620897 = \$34.62$ per hour **(do not round up)**

$34.62 \times 14 \text{ wks} \times 40 \text{ hrs} = \$19,387.20$ maximum for the entire summer

$34.62 \times 7 \text{ wks} \times 40 \text{ hrs} = \$9,693.60$ **Maximum allowed to earn in 7 weeks.**

FTE Calculation

No need for FTE calculation for Lump Sum Summer Categories☺. BUT you will want to figure out FTE if you have two concurrent EPAFs, one for research and one for teaching, since they cannot be more than 1 FTE in a single time period.

EXAMPLE: Max summer salary $\$19,387.20 / 7 \text{ pays} = \$2,769.60$ allowed per pay

$\$2,769.60 * 3 \text{ pays} = \$8,308.80$. They are to earn \$6,000. $\$6,000 / \$8,308.80 = 0.722$ FTE. This would be for comments only.

EPAF information: is to make \$6,000 for teaching accounting courses.

Approval Category= SSALMP (Look in NBAJOBS before choosing category.)

PCN = 009965 Suffix = 03

Hourly Rate = 2,000.00 (took \$6000/3 pays and factors to get hourly rate)

Annual Salary = 6,000.00

Hours per Day = 1

Hours per Pay = 1

Begin Dates = 05/11/25

End Dates = 06/21/25

Pays = 3

Factors = 3

Default Earnings Date = 05/11/25

Default Earnings Code = RSP

Default Hours/Units = 1

Calculation when working 7 days: Lump Sum

7-day lump sum: Used for **TEACHING, ADMINISTRATIVE, COURSE DEV. And Other non OSP sponsored activity**

Dates would be for the actual dates working. Figure out what the daily rate would be and multiply by 10 to get hourly rate and annual salary for 1 full pay period.

Faculty will be working May 25 - June 03 and will be receiving \$200 a day for 7 days for a total of =\$1,400.

Use the dates: 5/25/25 - 6/03/25 (use the actual dates for 7 days)

Hourly rate: \$2,000

Annual salary: \$2,000 (*will be paid for 7 days as indicated by your EPAF dates, \$1,400.*)

Hours per day: 1

Hours per pay: 1

Factors: 1

Pays: 1

Default earnings: 1

Comments: please tell us what they should be earning over the 7 days so we can make sure your calculations are correct.

Calculation when working one week: Lump Sum

One-week lump sum: Used for **TEACHING, ADMINISTRATIVE, COURSE DEV. And Other non OSP sponsored activity**

Dates would be for one week. Double annual salary and hourly rate.

Faculty will be working May 25 – May 31 and will be receiving \$3,000.00.

Use the dates: 5/25/25 – 5/31/25 (one week)

Hourly rate: \$6,000 (*will be paid half of this*)

Annual salary: \$6,000 (*will be paid half of this*)

Hours per day: 1

Hours per pay: 1

Factors: 1

Pays: 1

Default earnings: 1

Comments: please tell us what they should be earning over the one-week period so we can make sure your calculations are correct.

Sponsored Project Appointments

Grant, Subaward, Contract Funded, Research, Sponsored Activity, Other Sponsored Activity, Instruction (On a 22 fund)

Position Number and Suffix:

- Use **PCN 009965** with **.03** as the suffix. If an employee has 2 summer appointments running concurrently (e.g., within the same session) you can use .13, .23, etc. as needed.

Summer **Sponsored Project** appointments on grant funds (fund type 22) must be paid hourly over the summer session(s) worked (to ensure institutional base salary is not exceeded), using EPAFs identifying hourly rate, dates, and FTE.

Summer Sponsored Project Appointments: Please check NBAJOBS before selecting which category to use.

SSOAPT: Sponsored Project Original appointment at UI. (New to UI. First appointment with UI.)

SSRESP: Sponsored Project Reappointment, previous PCN and Suffix.

SSREDP: Sponsored Project Reappointment, new PCN and Suffix.

SSAAPP: Sponsored Project Additional appointment to previous PCN and suffix (Previously paid on PCN and Suffix) - Current UI Faculty

SSAAPT: Sponsored Project Additional appointment to new PCN and suffix (Not previously paid on PCN and Suffix) - Current UI Faculty

Summer session change categories:

GLBDST: To change labor distribution only.

STMJOB: Summer Session Termination of Job. Use to terminate a summer session appointment before the termination date in the system (earlier than what is originally planned.)

SCHPAY: Summer change of pay (hourly rate, annual salary, pays, factors and labor distribution.)

SMSCCH: Summer misc. change (FTE, hours per day and pay, rate, salary, pays, factors, and labor distribution.)

Salary calculations for research appointments:

- Dates should be inclusive of all work dates to ensure coverage and compliance with Workman’s Compensation Insurance.
- Use Institutional Base Rate, this **MUST** include base salary plus stipend. (E4105 & E4107.) Look in NBAJOBS.
- Stipends are likely on a **sperate PCN**. Please use the below Argos report to show JOBS primary and stipend PCN combined hourly rate. *Human Resources.Production.Departmental Reports.Faculty Institutional Base Salary.Faculty Institutional Base Salary Report*
- Divide salary by the AY contract hours for the summer maximum hourly rate. See the below chart for the most commonly used FTEs.
 - For deferred pay, the spread hourly rate is reflected in NBAJOBS. Take the salary and divide by the contract hours to get the **true earned hourly rate**.

NBAJOBS record:

Example of one FTE:

\$45,008.60 = \$28.851666. Use \$28.85/hr
1,560 hrs (1 FTE)

Example of one FTE on deferred pay:

\$99,652.80 = \$62.283 **\$99,652.80 = \$63.88**
1,600 (deferred pay) **1,560 (use if 1 fte)**

Example of less than one FTE: .875 fte

\$46,710.30 = \$34.22/hr
1,365 hrs (.875 FTE)

FTE	AY Contracted Hrs
1.00	1560
0.96	1498
0.875	1365
0.85	1326
0.75	1170
0.60	936
0.50	780
0.25	390
0.20	312
0.125	195

From OSP:

C-4. Institutional Base Salary (IBS): The annual compensation paid by the University to an employee, irrespective of the nature of the activities in which the employee is engaged while fulfilling the requisites of their appointment, e.g., research, instruction, service, and administration. IBS excludes any income that an individual may earn outside of the University or income earned as additional compensation for duties outside of their primary appointment. Note that administrative stipends for Chair, Dean, or other similar roles are included in the IBS definition. The IBS for each faculty member or employee is enumerated in the annual salary letter or as an amendment during the appointment period. Charges for work performed on sponsored projects are only allowable at the IBS rate. (See 2 CFR 200.430)

Human Resources.Production.Departmental Reports.Faculty Institutional Base Salary.Faculty Institutional Base Salary Report

EXAMPLE ONE: Sponsored Project Appointment

Jane Vandal, who is currently an Academic Year Faculty member for your department, will be conducting research on one of her grants during summer session (5/11/25 – 8/16/25). In her approved proposal, Jane indicated that her summer percentage of effort is 35% on this project, with pay coming from 895569 (the grant index established by OSP.) Jane's annual salary (Institutional Base Rate) is \$105,000. Below is a sample of the math used to calculate the pay at 35% effort for the summer period.

Maximum Summer Salary

$\$105,000 / 1560 = \$67.3076 = \$67.30$ per hour (**do not round up**)

$\$67.30 \times 14 \text{ wks} \times 40 \text{ hrs} = \underline{\$37,688}$ maximum for the entire summer

FTE Calculation – 35% effort for the entire summer (13 weeks)

$0.35 \times \$37,688 = \$13,190.80$

$\$13,190.80 / \$67.30 = 196$ hours

$196 \text{ hrs} / 560 \text{ hrs}^* = \underline{0.35}$ FTE *(14 wks x 40 hrs = 560 hrs)

$0.35 \text{ FTE} \times 80 \text{ hrs} = 28.00$ per pay and 2.80 per day

$\$67.30 \text{ hourly rate} \times 7 \text{ pay periods} \times 28.00 \text{ hrs} = \underline{\$13,190.80}$

IF her grant specifies she cannot make more than \$13,000. Make adjustments to the hours worked (if needed).

Per OSP: We are required to calculate salary on the institutional base salary for sponsored project, therefore the number of hours should be reduced. Not the hourly rate. We cannot adjust the hourly rate down or up.

$\$67.30 \times 7 \times 27.5 \text{ hours per pay} = \underline{\$12,955.25}$

EPAF information

Approval Category = SSAAPP or SSAAPT (previously paid on pcn/suffix) (Look in NBAJOBS before choosing a category.)

PCN = 009965 Suffix = 03

Hourly Rate = \$67.30

Annual Salary = \$13,190.80

FTE = .35

Hours per Day = 2.80

Hours per Pay = 28.00

Begin Dates = 05/11/25

End Dates = 08/16/25

Pays = 7

Factors = 7

Default Earnings Date = 5/11/2025

Default Earnings Code = RSP

Default Hours/Units = 28.00

Make sure to enter EPAF comments.

EXAMPLE TWO: Sponsored Project Appointment

Johnny Depp is an Academic Faculty who would like to be paid from one of his grants over five weeks of the summer at 25% effort for those 5 weeks. He would like to work the maximum hours and at the maximum pay rate he can get during the five weeks. Johnny's annual salary (Institutional Base Salary) is \$45,000.

Maximum Summer Salary

$\$45,000 / 1560 = \$28.846 = \$28.84$ per hour (**do not round up**)

$\$28.84 \times 14 \text{ wks} \times 40 \text{ hrs} = \$16,150.40$ maximum for the entire summer

FTE Calculation: (wants max hours and max pay for 5 weeks)

25% effort over the summer 5 weeks – Index # 895569.

$0.25 \times \$16,150.4 = \$4,037.60$ for 5 weeks

FTE = $\$4,037.60 / \$28.84 = 140$ hours

$140 \text{ hrs} / 200 \text{ hrs}^* = 0.70$ FTE $*(5 \text{ wks} \times 40 \text{ hrs} = 200 \text{ hrs})$

0.70 FTE $\times 80 \text{ hrs} = 56.00$ per pay and 5.60 per day

$\$28.84$ hourly rate $\times 2.5$ Pays Factor $\times 56 \text{ hrs} = \$4,037.60$

If his grant specifies he cannot make more than \$4,000. Make adjustments to the hours if needed.

****Adjusted Hours per pay, not the hourly rate**** = $\$28.84 \times 2.5 \times 55.4 \text{ hours} = \$3,994.34$

EPAF information

Approval Category = SSAAPP or SSAAPT

(Look in NBAJOBS before choosing a category.)

PCN = 009965 Suffix = 03

Hourly Rate = \$28.84

Annual Salary = 4,037.60

FTE = 0.70

Hours per Day = 5.6

Hours per Pay = 56.00

Begin Dates = 05/11/25

End Dates = 06/14/25

Pays = 2.5

Factors = 2.5

Default Earnings Date = 05/11/25

Default Earnings Code = RSP

Default Hours/Units = 56.00. Make sure to enter comments.

Calculation when working only ONE week: Sponsored Project

One week hourly: Used for **Sponsored Projects**

- Use dates for one week BUT double annual salary, FTE, hours per day, hours per pay and default earnings.
- This will ensure they will be paid half of what your EPAF states.
- Please make sure to state in your comments the exact amount they should be paid.

Example:

Joe Vandal will be working 20 hours May 11 - May 17 and will be receiving \$700. They make \$35/hr.

Use the dates: 5/11/25 - 5/17/25 (*one week*)

Hourly rate: \$35.00

Annual salary: \$1,400 (*will be paid half of this due to the dates entered.*)

FTE: .5 (*true FTE is .25, but we must double it*)

Hours per day: 4 (*true hours are 2, but we must double it*)

Hours per pay: 40 (*true hours are 20, but we must double it*)

Factors: 1

Pay: 1

Default earnings: 40 (*true hours are 20, but we must double it*)

Comments:

Use specific comments including:

Joe Vandal is working 20 hours a week the dates of 5/11/25 - 5/17/25. His hourly rate is \$35, and he should be paid \$700.00.

Calculation when working 7 days: Sponsored Project

Working 7 days, hourly: Used for **Sponsored Project**

- Please make sure to state in your comments the dates and exact amount they should be paid.

Example:

Jane Vandal will be working 7 days, 8 hours a day to total 56 hours, May 25 - June 03 and will be receiving \$1,960. They make \$35/hr. $\$1,960 / 7 \text{ days} / 8 \text{ hours} = \35.00

Use the exact dates: 5/25/25 - 6/03/25 (7 days)

Hourly rate: \$35.00

Annual salary: \$2,800 ($\$35.00 * 80$, what a full pay period would be (8 hours per day * 10 business days). Banner will calculate salary by your dates)

FTE: 1.0

Hours per day: 8

Hours per pay: 80

Factors: 1

Pay: 1

Default earnings: 80

Comments:

Use specific comments including:

Jane Vandal is working 8 hours for 7 days 5/25/25 - 6/03/25. His hourly rate is \$35.00, and he should be paid \$1,960.00.

Reminders

- **Dean / Director Level approvers will ensure:**
 - Annual summer salary does not exceed the maximum summer salary. (Same calculations as previous years.)
 - FTE does not exceed 1.0 at any time.
 - Sponsored project indexes are active and have available funds.
 - Coordination of appointments with all other departments. **This is required within the EPAF routing queue. Please enter the fiscal officer or DGA of the other college/department. Enter a new DNDIR level, choose the individual, pick 'approve' or 'FYI.'**
 - Calculations are correct.
 - Work with DGA for percent of effort.
- Include all calculations and dates in the comments of the EPAF.
- **Hourly rates for sponsored projects:** Per federal regulations, we are required to calculate salary on the institutional base salary (IBS) for sponsored project, we cannot adjust the hourly rate up or down to make the salary come out evenly for EPAF purposes. If the overall salary needs to be adjusted, the number of hours/FTE should be reduced. **Not the hourly rate.** Do not round the hourly rate up. If it comes to \$74.2398, please use \$74.23 to ensure IBS is not exceeded.
- For ALL appointments, the Institutional Base Rate must be used; this **MUST** include base salary plus stipend. (E4105 & E4107.) If they have a stipend (E4107) it's likely on a separate PCN. Please add base and stipend together. See Argos report. *Human Resources.Production.Departmental Reports.Faculty Institutional Base Salary.Faculty Institutional Base Salary Report*
- Fiscal Year Faculty are ineligible for summer session and must be paid as Additional Compensation. **This is rare on OSP sponsored activities. Please work with OSP if you have any questions.
- Coordination of appointments with all other departments. This is required within the EPAF routing queue. Please enter the fiscal officer or DGA of the other college/department. Enter a new DNDIR level, choose the individual, pick 'approve' or 'FYI.' See page 14.
- Do not use next FY promotions or pay increases when calculating summer salary, even if the appointment starts after July 1. The new salary is not effective until the next academic year.
- Only use an FTE of 1.0 if you are paying the maximum rate and hours for the time period.
- **The lowest FTE is .125**, 1 hour a day, 10 per pay. If you need to process an EPAF for lower than this, it needs to be a unit pay EPAF. ****The faculty needs to submit a timesheet for unit pay to be paid out.
- FTE should be rounded to 3 decimals (Ex: .51875 is .519) after calculated to an even 5 decimals.
- Hours per pay must be rounded to one decimal so hours per day can round to two. Cannot round to three!
 - EX: 55.60 hours per pay = 5.56 per day. ☺
 - 55.65 hours per pay= 5.565 per day. ☹ It will not work for our system.

- All dollar figures must be rounded to 2 even decimals (Ex. \$35.15/hr not \$35.154/hr) **Do not round up for any appointments.**
- Do not change the Pays/Factors when you change the rate or hours per day/pay in the middle of the appointment, please just recalculate the annual salary based on new rate or new hours per day/pay. If you have to change the rate or FTE after an appointment has already started, keep the pays/factors the same as they were in the original appointment and calculate the new annual salary as if the employee had been working at that rate from the beginning. Banner will know not to overpay.
- If you put on multiple EPAFs for the same person in the same pay period, please use different suffixes (.13, .23, .33)
- **Default Earnings** = Hours per pay. Must be filled in **with current hours per pay**. Last summer's information (dates and hours) will flood into the earnings section and labor distribution section. **PLEASE** make sure to change these (Dates should = Jobs Effective Date). **RSP** is the earnings code to use.
- Account code for summer session: **E4108**
- Please use summer session categories: STMJOB = Summer Session Termination of Job to terminate a summer session early. Use instead of GTMJB1. Use SCHPAY AND SMSCCH instead of FCHPAY / FMSCCH.
- If Faculty is leaving the University and a primary job is terminated as of 5/11/2025, use additional appointment EPAF instead of reappointment to avoid running into **"Employee already has primary job"** errors.
- **NBAJOBS**: Set the query date to **January 1, 2009**, so that any previous Summer Session appointments on PCN 9965 will be viewable, alongside any current appointments.
- **Holidays**: May 25, June 19 and July 4. You **do not need to worry** about these. Example: faculty working June 23 – July 20...Do not use 1.9 pays and factors, use 2.0 The faculty member will just need to work their hours within the four days of that week. They will not receive holiday pay.
- **PERSI** - use **PCN 009965**, not 006595. **Please use a summer session Additional Appointment Category for Retirees. Additional guidance for PERSI retirees:
 - Early retiree (retired prior to age 65): must have a 90-day break in service before returning to employment with a PERSI employer.
 - Retirees under a service retirement (retired on or after age 65) may return to work in an ineligible position with any PERSI employer without a 90-day break in service.
 - It is always recommended to have individuals contact PERSI to confirm any restrictions before returning to work!
- **ORP**: Retirees who plan to begin fund withdrawals at the time of retirement should have a minimum of 2 pay period break in service.
- **Make sure you have an EPAF proxy set up!** Please also make sure they are aware they are your proxy

- **Putting on a late summer EPAF?** We need to use accurate dates! If someone worked UI 15 during the summer but didn't tell you until UI16, please do not put on an EPAF with the effective dates for UI16 and then request a retro pay. This is not accurate reporting. You will need to request a special check if the job is done. Please do not tweak dates on EPAFs to avoid special checks. ***Please communicate this to your faculty so we can try our hardest to have EPAFs in on time.**

Graduate Assistant Information

We often receive questions regarding Graduate Assistants who work in the summer:

- **Teaching Assistants:**
 - If enrolled in at least one credit, can be appointed as a Teaching Assistant using the Graduate Assistant EPAF categories.
 - If there is no break-in-service, you can use the EPAF Category TACASP (TA Continued Appt.)
 - If not enrolled in courses, must fill out a summer contract, please receive Provost Office approval and use the faculty summer session EPAF categories.
- **Research Assistants:**
 - If enrolled in at least one credit, can be appointed as a Research Assistant using the Graduate Assistant EPAF categories.
 - If there is no break-in-service, you can use the EPAF Category TPCASP (RA Continued Appt.)
 - If not enrolled in courses, must be appointed as Temporary Help using Temporary Help EPAF categories (TH-Research-Lab or TH-Research-Non-Lab)
- **Support assistants:**
 - Must be appointed using Temporary Help EPAF categories (TH-Clerical/Tutor, etc.)

Graduate Assistants can be on the system as follows:

- For the entire Fiscal Year: For FY26 dates= 6/22/25 – 6/20/26 (not common for TA's though.)
- For summer appointment= 5/11/25 – 8/16/25
- For each semester or entire academic year.
- They **cannot** be on the system May to May, August to August, December to December.

- Graduate Assistant account code = **E4109**

What the College of Graduate Studies will be looking for within TA EPAFs:

- The FTE: ex: .50 (40 hours / pay) or .25 (20 hours / pay)
- Comments: it would be helpful for you to provide this information if known:
 - a) What course are they assisting with.
 - b) If the TA is a non-resident, this will help her check their residency status to see if they need an out-of-state waiver. She will contact departments when she has questions regarding this.

Information from the College of Graduate Studies website: <http://www.uidaho.edu/cogs/faculty-resources/ta-support-faqs>

EPAF Approvals (Creating A Proxy)

You will go to Employee Dashboard and Login to create the Proxy for EPAF Approvals.

- In the Employee Main Menu, select “Electronic Personnel Action Form (EPAF)” menu.
- Select “EPAF Proxy Records”
- Drop down and choose the correct approval level and click ‘add proxy’

[Home](#) > [Personnel Actions](#) > [EPAF Proxy Records](#)

EPAF Proxy Records

Proxies

Please select an approval level to start.

Remove Selected **Add Proxy...**

Approval Level

Select Approval Level

- Dean/Director (DNDIR)**
- Department Head/Chairman (DPCHR)
- System Administrators (SYSADM)

EPAF Proxy Records

Proxies

- Bower, Trina R. (TMAHONEY)
- Gray, Travis (TGGRAY)
- Johnson, Derek (DEREK)
- Smith-Sarkkinen, Cheyenne K. (CHEYENNE)

Remove Selected **Add Proxy...**

Add Proxy for Dean/Director

bunn

- Bunney, Cretia (CRETIAB)
- Bunney, Stephanie H. (STEPHANIE)
- Bunney-Trainer, Cretia V. (CRETIABTRNG)

CANCEL **SUBMIT**

Call us with questions!

We are happy to help you!

Jill (Budget Office): 885-7122 budget@uidaho.edu

HR Team: hrepaf@uidaho.edu

Sponsored Program questions:

Heather Clark: osp@uidaho.edu