UNIVERSITY OF MINNESOTA

HRMS BUSINESS PROCESS:

9 Month Appointments Paid Over 12 Months

Questions? Call the HRMS Call Center, 612-625-2016
HRMS Business Process:
9 Month Appointments Paid Over 12 Months

General Guidelines

1. “9 over 12” is defined as: an appointment term less than 12 months in length, but paid out over 12 months. Please note this distinction: As a general rule, the first day of the first pay period of the fiscal year is when payment begins for the 12 months (new and rehire employees are the exception - see New Employees Who Choose the 9 over 12 Payment Option). However, the first day of the appointment term is the actual date the employee starts work. This date distinction is critical when setting up the job data and distribution rows.

2. Eligible employees must satisfy the following criteria:
   • hold paid, primary appointments in the job code series 93XX, 94XX, 96XX, or 97XX
   • must be appointed for a full term
   • must be at least 50% time appointments
   • must begin 9 over 12 enrollment on or before the first paycheck is issued for the particular appointment term. If this deadline is missed, employee can request enrollment for 9 over 12 the following year.

3. Valid appointment term codes:
   - 9 months paid over 26 pay periods: BJ, LT, RV, BJC*
   - 9.5 months paid over 26 pay periods: GU, GUC*
   - 10 months paid over 26 pay periods: DF, EH, KW, MN, XY, KWC*
   *Use of these codes necessitates completing the Multi Year or Special Dates field on the Appointment UM panel.

4. Most effective dates should equal the actual dates of work, not the paid dates.

5. NEW 9 over 12 employees are in a state of earnings in which pay is earned, starting at the fiscal year, but not paid until the appointment term begins. As such, the first payment for NEW employees is delayed until the first day of the first pay period of the term. This first payment will then include a lump sum payment from the beginning of the fiscal year through the terms’ first pay period. (See New Employees Who Choose the 9 over 12 Payment Option.)

6. Employees who have GRANTS (sponsored accounts) need to be paid from non-sponsored accounts. To accomplish this, their distribution lines are set up on non-sponsored accounts and then HSAs should be processed each pay period to transfer salary and fringe charges from non-sponsored to sponsored accounts. (See Sponsored Accounts Funding, Historical Salary Adjustments. These sections are under review.)

7. “Salary Payment Schedule for Enrolling in 9 over 12 – Memorandum of Agreement” must be completed and returned to the department payroll person prior to the first pay period of the fiscal year (See Pg 31.) The department payroll person should fax, 612-626-1053, a copy of the MOA to Central Payroll. URL: http://www1.umn.edu/ohr/forms

8. For terminating Enrollment for 9 over 12, use “Salary Payment Schedule for Enrolling in 9 over 12 – Memorandum of Agreement”. This must be completed and returned to the department payroll person when the employee chooses to end the 9 over 12 enrollment. The department payroll person should fax, 612-626-1053, a copy of the MOA to Central Payroll. URL: http://www1.umn.edu/ohr/forms

9. Overpayment Notification must be completed and returned to Central Payroll when an overpayment situation occurs. Payroll will contact the department to discuss what action needs to be taken. URL: http://www1.umn.edu/ohr/payroll/forms
New Employees Who Choose the 9 over 12 option

Hiring NEW employees with no pre-existing job data or whose existing empl records are all in terminated status who choose the 9 over 12 payment option

**Job Data:**
1. When establishing a new Empl record the effective date of the initial hire row must equal the first day of the appointment term not the beginning of the fiscal year. (If building on a terminated record, insert a new row establishing the new appointment, then follow the above. Also check all fields and, when necessary, change the data according to the new appointment.)

2. The compensation rate is computed by using the appointment term’s annual base salary times appointment percentage (if less than 100%) divided by 26 pay periods:
   \[ \text{Appt Term Annual Base \$} \times \text{Appointment \%} \div 26 \text{ pay periods} = \text{Compensation Rate} \]

**NOTE:** The first payment is delayed until the first pay date of the term, and will include pay from the beginning of the fiscal year through the terms’ first normal pay period. The department should calculate and enter the pay for this previous pay into Pay Entry, using the Earning Code PPP (See Pay Entry below.)

3. The appointment term code must equal a “9 over 12” code. (See Appointment Term codes on Pg 3.)

4. The effective date on the Distribution panel is the date of the appointment, not the beginning of the fiscal year.

**Pay Entry:**
1. Department should calculate Amount Owed from the beginning of the fiscal year to the effective date of appointment term:
   \[ \text{Compensation Rate} \times \# \text{ of Previous Pay Periods} = \text{Amount Owed} \]

2. By Pay Entry deadline of the first pay period of appointment term, enter this information into Pay Entry.

*(NOTE: All examples listed use Twin Cities 2002-2003 appointment dates. These dates are subject to change when used for future fiscal years and appointments.)*

**Example:** A new employee with no pre-existing data who chooses the 9 over 12 payment option. She’ll be starting Fall semester with a base salary of $35,000.

**Job Data:**
- Work Location: 8/26/02 Hire/xx *(Insert appropriate action/reason w/ effective date of appt term)*
- Compensation: $35,000 \times 100\% \div 26 \text{ pay periods} = $1,346.15 Compensation Rate
- Appointment: The appointment term code must equal a “9 over 12” code (See Term codes on Pg 3.)
- Distribution: 8/26/02 *(Effective date is the date of the appointment term, not pay date)*

**Pay Entry:**
1. Calculate Amount Owed: $1,346.15 \times 5 \text{ pay periods} (6/17/02 – 8/25/02) = $6,730.75

2. By Pay Entry deadline of first pay period of appointment term (9/11/02), insert a row and enter this information into Pay Entry.
Current Employees Who Choose the 9 over 12 option

Current academic employees on appointment terms less than 12 months, employed for 9 months or greater choosing the 9 over 12 payment option

Job Data:
1. When building on an existing record, insert two new rows to establish this type of appointment. (Be sure to check all fields and, when necessary, change the data according to the new appointment.)
   - The effective date for a current academic employee moving to a 9 over 12 is the first day of the first pay period of the new fiscal year. The action/reason, effective sequence "0", will be Return from Short Work Break/Return From Break.

2. The compensation rate for a 9 over 12 is computed by using the appointment term's annual base salary times appointment percentage (if less than 100%) divided by 26 pay periods.
   \[ \text{Compensation Rate} = \frac{\text{Appt Term Annual Base \$} \times \text{Appointment \%}}{26 \text{ pay periods}} \]

3. The appointment term code must equal a "9 over 12" code. (See Appointment Term codes on Pg 3.)

4. Insert a new row on the Distribution panel with an effective date of the first day of the first pay period of the new fiscal year.

      (NOTE: All examples listed use Twin Cities 2002-2003 appointment dates. These dates are subject to change when used for future fiscal years and appointments.)

Example: An existing academic employee chooses to move to the 9 over 12 payment option. Her base salary is $28,500.

Job Data:
- Work Location
  - 6/17/02 Return from SWB / Return From Break (Eff Seq "0")
  - 6/17/02 Data Change / Term Code Change (Eff Seq "1")
- Compensation
  - $28,500 x 100% / 26 pp = $1,096.15
- Appointment
  - Applicable Appointment Term code (Pg. 3)
- Distribution
  - 6/17/02 $1,096.15
Non-academic 12 month (A Term) employees employed for one year or greater moving to an academic classification choosing the 9 over 12 option

Job Data:
1. Insert a new row, Transfer/XX, as the action/reason. The new effective date will be the first day of the first pay period of the new fiscal year.

2. Be sure to check all fields and, when necessary, change the data according to the new appointment. NOTE: If the Department changes, the new Department field effective date will be the first day of the appointment term. The new Job Code field effective date will also be the first day of the appointment term.

3. The compensation rate is computed by using the appointment term’s annual base salary times appointment percentage (if less than 100%) divided by 26 pay periods:
   \[
   \text{Appt Term’s Annual Base} \times \text{Appointment \%} / 26 \text{ pay periods} = \text{Compensation Rate}
   \]

4. The appointment term code must equal a “9 over 12” code. (See Appointment Term codes on Pg 3.)

5. The effective date on the Distribution panel is the first day of the first pay period of the new fiscal year.

NOTE: For Less than 12 month employees (Non-A Term), all of the above is applicable. One additional step is also required:
- Prior to inserting the Transfer/XX row (as noted above), insert a new row, Eff Seq 0, with a Return from Short Work Break or Recall, as applicable. The new effective date will be the first day of the first pay period of the new fiscal year. The Transfer row will then have an Eff Seq of 1.

(NOTE: All examples listed use Twin Cities 2002-2003 appointment dates. These dates are subject to change when used for future fiscal years and appointments.)

Example 1(A Term): A Community Program Specialist (8315) has accepted the position of Coordinator (9354) at a new department, Disability Services (694A), beginning of Fall Semester, 2002-2003. His A Term appointment ends at the end of the fiscal year. He has chosen the 9 over 12 payment option with his new B Term appointment and his new B base will be $30,000.

Job Data:

Work Location
6/17/02 Transfer / XX

Dept. 694A Department Field Effective Date: 8/26/02

Job Information
Job Code 9354 Job Code Field Effective Date: 8/26/02

Compensation
$30,000 x 100% / 26 pp = $1,153.85

Appointment
Applicable Appointment Term code (Pg 3)

Distribution
6/17/02 $1,153.85
Non-academic less than 12 month (Non-A Term) employees employed for one year or greater moving to an academic classification choosing the 9 over 12 option

(See Non-Academic 12 month for Job Data instructions.)

**Example 2 (Non-A Term):** A Community Program Specialist (8315) holding a 10 month K term appointment (7/30/01 – 5/26/02) has accepted a 9 month position of Coordinator (9354) at a new department, School of Public Health (660A) beginning of Fall Semester, 2002-2003. She has chosen the 9 over 12 payment option and her new B base will be $30,000.

**Job Data:**

<table>
<thead>
<tr>
<th>Work Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/17/02</td>
</tr>
<tr>
<td>Return SWB (Eff Seq 0)</td>
</tr>
<tr>
<td>6/17/02</td>
</tr>
<tr>
<td>Transfer / XX (Eff Seq 1)</td>
</tr>
</tbody>
</table>

Department 660A  Department Field Effective Date: 8/26/02

**Job Information**

<table>
<thead>
<tr>
<th>Job Code</th>
<th>9354</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Code Field Effective Date: 8/26/02</td>
<td></td>
</tr>
</tbody>
</table>

**Compensation**

$30,000 x 100% / 26 pp = $1,153.85

**Appointment**

Applicable Appointment Term code (Pg. 3)

**Distribution**

| 6/17/02 | $1,153.85 |
**Change of Standard Hours or Percentage of Appointment**

**Job Data:**
1. Insert a new row with an action/reason of Data Change / Standard Hours. The effective date should be the actual date when this change occurs.

2. On the Job Information panel, change the Standard hours and FTE appropriately.

3. Change the compensation rate to the appropriate compensation amount after recalculating the 9 over 12 rate.

   \[ \text{Appt Term Annual Salary} \times \% \text{ of Appointment} \div 26 \text{ pay periods} = \text{New Comp rate} \]

4. Insert a new row on the Distribution panel with an effective date of the actual data change.

*(NOTE: All examples listed use Twin Cities 2002-2003 appointment dates. These dates are subject to change when used for future fiscal years and appointments.)*

**Example:** A 9 over 12 Assistant Professor will be reducing her appointment to 75% effective the beginning of Spring Semester, 2003. Her base salary is $31,650.00.

**Job Data:**

- **Work Location**
  - 1/9/03 Data Change / Standard Hours

- **Job Information**
  - Standard Hours: 30; FTE .75
  - Compensation
    - $31,650 \times .75 / 26pp = $912.99

- **Distribution**
  - 12/16/02 REG $912.99 *(pays 75% of salary per reduction in appointment on the first day of the 14th PP)*
  - TUP $304.32 *(stops payment of the 25% balance until beginning of Spring Semester)*
  - 1/9/03 REG $912.99 *(re-establishes the $912.99 as the 100% salary for the 75% appointment)*
Leaves of Absence (LOA)

When working with leaves of absence (LOA) for 9 over 12 employees, it is important to note that the leave dates in Job Data should reflect the actual days absent. The payment distribution dates, however, might be different. Therefore, two things need to be accomplished when setting up an LOA with or without pay. First, the dates of the actual leave must be set up on the Job Data panel and, second, the appropriate pay dates and earnings codes must be established on the Distribution panel.

(Note: All examples listed use Twin Cities 2002-2003 appointment dates. These dates are subject to change when used for future fiscal years and appointments.)

LOA Without Pay

A. Full Year LOA without Pay

A full year leave of absence is one in which the employee is gone 100% with 100% no salary. To establish a full year LOA for a 9 over 12 employee, the actual leave dates will be Fall and Spring semesters (8/26/02 – 5/25/03), but the distribution dates will be the fiscal year, (6/17/02 – 6/15/03).

Job Data:
1. Insert the action/reason “LOA/xxx” effective the first day of the actual leave (first day of Fall semester.)
2. Insert action/reason “RFL/xxx” effective the first day returning from leave (day after end of Spring semester.)

Distribution:
3. Insert earnings code TUP effective on the first day not to be paid.
4. Insert earnings code REG to coincide with the LOA action date.
5. Insert earnings code TUP to coincide with the Return LOA action date.
6. Insert earnings code REG effective the date to be paid.

Example: A 9 over 12 employee on a full year LOA without pay.

Job Data:
08/26/02 LOA/xxx (LOA action puts the employee on leave and stops pay)
05/26/03 RFL/xxx (returns employee on actual return date-day after end of Spring semester)

Distribution:
06/17/02 TUP (while not on actual leave yet, TUP will stop pay)
08/26/02 REG (used w/LOA action, because the action stops the pay)
05/26/03 TUP (back from leave, but still should not receive pay)
06/16/03 REG (re-establishes pay the first day of the new fiscal year)
B. Single Semester LOA (Fall) without Pay

A single semester LOA is one in which the employee is gone 100% for one semester without pay. For a 9 over 12 employee on a single semester Fall LOA, the actual leave dates are (8/26/02 – 1/8/03). However, the distribution dates will be different because the employee will be off payroll for 13 pay periods (6/17/02 – 12/15/02). Additionally, because the ending of Fall semester (8/26/02 – 1/8/03) affects pay periods 14 and 15, use of Pay Entry is needed to ensure the employee receives appropriate pay when returning from leave.

Job Data:
1. Insert the action/reason “LOA/ xxx ” effective the first day of the actual leave (first day of Fall semester.)
2. Insert action/reason “RFL/xxx” effective the first day returning from leave (first day of Spring semester.)

Distribution:
3. Insert earnings code TUP effective on the first day not to be paid.
4. Insert earnings code REG to coincide with the LOA action date.

Pay Entry:
5. For pay periods 14 & 15, go to Pay Entry and SAVE. No entry is required. (Hitting SAVE in Pay entry overrides the Employee Status on Job Data. So even though employee is LOA until the beginning of Spring semester, 1/9/03, they will receive payment for pay periods 14 & 15, 12/16/02 – 12/29/02 and 12/30/02 – 1/12/03).

Example: A 9 over 12 employee on a Fall Semester LOA without pay.

Job Data:
08/26/02  LOA/xxx  (LOA action puts the employee on leave and stops pay)
01/09/03  RFL/xxx  (returns employee on actual return date- first day of Spring semester)

Distribution:
06/17/02  TUP    (while not on actual leave yet, TUP will stop pay)
12/16/02  REG    (used w/LOA action, because the action stops the pay)

Pay will be reactivated by the Pay Entry step below.

Pay Entry:
PP 14    Pay Entry- Go to Pay Entry when open during pay period 14 and hit SAVE.
PP 15    Pay Entry- Go to Pay Entry when open during pay period 15 and hit SAVE.
C. Single Semester LOA (Spring) without Pay

For a 9 over 12 employee on a single semester Spring LOA, the actual leave dates are (1/9/03 – 5/25/03). However, the distribution dates will be different because the employee will be off payroll for 13 pay periods (12/16/02 – 6/15/03). So, when establishing a Spring LOA, payment should be stopped effective the first day of pay period 14.

Job Data:
1. Insert the action/reason “LOA/xxx” effective the first day of the actual leave (first day of Spring semester.)
2. Insert action/reason “RFL/xxx” effective the first day returning from leave (day after end of Spring semester.)

Distribution:
3. Insert earnings code TUP effective on the first day not to be paid.
4. Insert earnings code REG to coincide with the LOA action date.
5. Insert earnings code TUP to coincide with the Return LOA date.
6. Insert earnings code REG effective the date to be paid.

Example: A 9 over 12 employee on a Spring Semester LOA without pay.

Job Data:

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/09/03</td>
<td>LOA/xxx</td>
<td>(LOA action puts the employee on leave and stops pay)</td>
</tr>
<tr>
<td>05/26/03</td>
<td>RFL/xxx</td>
<td>(returns employee on actual return date-day after end of Spring semester)</td>
</tr>
</tbody>
</table>

Distribution:

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/16/02</td>
<td>TUP</td>
<td>(stops payment effective the first day of pay period 14)</td>
</tr>
<tr>
<td>01/09/03</td>
<td>REG</td>
<td>(used w/LOA action, because the action stops the pay)</td>
</tr>
<tr>
<td>05/26/03</td>
<td>TUP</td>
<td>(return from leave, but still should not receive pay)</td>
</tr>
<tr>
<td>06/16/03</td>
<td>REG</td>
<td>(re-establishes pay the first day of the new fiscal year)</td>
</tr>
</tbody>
</table>
**LOA with Full Pay**

A fully paid leave of absence is one in which the employee is gone 100% and paid 100%. Even though pay is not affected on a fully paid LOA, the earnings codes will change to indicate the leave and record the history of the leave.

**Job Data:**
1. Insert the action/reason “PLA/xxx” effective the first day of the actual leave.
2. Insert action/reason “RFL/xxx” effective the date returning from leave.

**Distribution:**
3. Insert earnings code LVP effective the first day to be paid (i.e. full year = first day of fiscal year; Fall semester = first day of fiscal year; Spring semester = first day of pay period 14.)
4. Insert earnings code REG effective the date returning to regular pay.

**Example:** A 9 over 12 employee on a full year 100% paid LOA.

**Job Data:**
- 08/26/02 PLA/xxx (paid leave effective the beginning of the academic year)
- 05/26/03 RFL/xxx (return from paid leave the first day after Spring semester)

**Distribution:**
- 06/17/02 LVP (while not on actual leave yet, LVP indicates the paid leave for a 9 over 12 should begin at the fiscal year)
- 06/16/03 REG (returns employee to regular pay at the start of the new fiscal year)

**Example:** A 9 over 12 employee on a Fall Semester 100% paid LOA.

**Job Data:**
- 08/26/02 PLA/xxx (paid leave effective at the beginning of Fall semester)
- 01/09/03 RFL/xxx (return from leave first day of Spring semeste.)

**Distribution:**
- 06/17/02 LVP (while not on actual leave yet, LVP indicates the paid leave for a 9 over 12 should begin at the fiscal year.)
- 12/16/02 REG (returns to regular pay first day of pay period 14)

**Example:** A 9 over 12 employee on a Spring Semester 100% paid LOA.

**Job Data:**
- 01/09/03 PLA/xxx (actual leave effective first day of Spring semester)
- 05/26/03 RFL/xxx (return from actual leave day after Spring semester)

**Distribution:**
- 12/16/02 LVP (while not on actual leave yet, LVP indicates payment for leave begins the first day of pay period 14)
- 06/16/03 REG (returns to regular pay first day of new fiscal year)
LOA with Partial Pay

A partial pay leave of absence is one in which the employee is gone 100% of the actual leave time and receives a portion of his/her salary while on leave. When establishing a "partial pay" LOA for a 9 over 12 employee, there will be two earnings codes on separate distribution lines making the total hours or percent correspond to the job record (i.e. a 75% paid leave may use earnings codes TUP 25% unpaid and LVP 75% paid.)

For partial pay LOA’s, several calculations must be made to determine the correct amount of salary to be paid over the leave time.

(NOTE: Do not change Standard Hours and/or Compensation Rate as this will affect Benefits.)

A. Full Year LOA with Partial Pay

1. Bbase salary ($) divided by 26 pay periods (PP) = $ per PP.
2. $ per PP x % of paid leave = $ per PP to be paid
3. $ per PP - $ per PP to be paid = $ per PP not to be paid

Example: A 9 over 12 employee with a Bbase of $25,000 taking a full year LOA with 75% pay.

1. $25,000 / 26 pp = $961.54
2. $961.54 x 75% = $721.16 (amount to be paid each PP)
3. $961.54 - $721.16 = $240.38 (amount not to be paid each PP)

Job Data:
8/26/02 PLA/xxx (begins actual 100% leave while at 75% pay)
5/26/03 RFL/xxx (returns from leave while at 75% pay)

Distribution:
6/17/02 LVP $721.16 (not on actual leave yet, but receives 75% paid leave)
6/16/03 REG $961.54 (day after leave ends, returns to100% pay)
6/16/03 TUP $240.38 (not on actual leave yet, but stops 25% of pay)
B. Single Semester (Fall) LOA with Partial Pay

1. Base salary ($) divided by 26 pay periods (PP) = $ per PP.
2. $ per PP × % of paid leave = $ per PP to be paid
3. $ per PP - $ per PP to be paid = $ per PP not to be paid

Example: A 9 over 12 employee with a base of $25,000 taking a single semester Fall LOA (Sabbatical) with 50% pay.

1. $25,000 / 26 pp = $961.54
2. $961.54 × 50% = $480.77 (amount to be paid each PP)
3. $961.54 - $480.77 = $480.77 (amount not to be paid each PP)

Job Data:

08/26/02 PLA/SBS (begins actual 100% leave while at 50% pay)
01/09/03 RFL/SBS (returns from leave at 100% pay)

Distribution:

6/17/02 SLB $480.77 (not on actual leave yet, but receives 50% pay)
SLU $480.77 (not on actual leave yet, but stops 50% of payment)
12/16/02 REG $961.54 (start of pay period 14, returns to 100% pay)

Pay will be reactivated by the Pay Entry step below.

Pay Entry:

PP 14 Pay Entry: Go to Pay Entry when open during pay period 14 and hit SAVE.
PP 15 Pay Entry: Go to Pay Entry when open during pay period 15 and hit SAVE.
C. Single Semester (Spring) LOA with Partial Pay

1. Base salary ($) divided by 26 pay periods (PP) = $ per PP.
2. $ per PP \times \% \ of \ paid \ leave = $ per PP \ to \ be \ paid
3. $ per PP - $ per PP to be paid = $ per PP not to be paid

Example: A 9 over 12 employee with a Base of $25,000 taking a single semester Spring LOA (Sabbatical) with 50% pay.

1. $25,000 / 26 pp = $961.54
2. $961.54 \times \ 50\% = $480.77 \ (amount \ to \ be \ paid \ each \ PP)
3. $961.54 - $480.77 = $480.77 \ (amount \ not \ to \ be \ paid \ each \ PP)

Job Data:
01/09/03 PLA/SBS (begins actual 100% leave while at 50% pay)
05/26/03 RFL/SBS (returns from leave while at 50% pay)

Distribution:
12/16/02 SLB $480.77 (not on actual leave yet, but receives 50% pay at start of PP 14)
SLU $480.77 (not on actual leave yet, but stops 50% of pay at PP 14)
6/16/03 REG $961.54 (start of the new fiscal year returns to 100% pay)
D. Partial Pay LOA other than Full Year or Single Semester

This type of partial pay LOA is one in which an employee is gone 100% during leave, the leave itself is a portion of a full year or portion of one semester (i.e. 3 pay periods) and the employee is receiving partial pay during the leave. An LOA of this kind requires a few more calculations.

The essential calculation for putting a 9 over 12 employee on this type of leave is to determine the amount of salary to be paid during the leave time by comparing the difference in the 9 over 9 to the 9 over 12 appointment (see instructions below.)

As with other LOA’s for 9 over 12 employees, the dates of the actual leave must be set up on the Job Data panel and the appropriate pay dates and earnings codes must be established on the Distribution panel. Again, there will be two earnings codes on separate distribution lines making the total hours or percent correspond to the job record.

Example 1: A 9 over 12 employee with a base salary of $78,000 is taking an educational leave for 3 PP (11/4/02 – 12/15/02) and receiving 30% pay while on leave.

1. Calculate the 9 over 9 bi-weekly pay rate:
   
   \[ \text{Base} \div 19.5\text{ PP} = \text{9 over 9 biweekly rate} \]
   
   \[ \frac{\$78,000}{19.5\text{PP}} = \$4,000 \text{ (9 over 9 biweekly rate)} \]

2. Calculate the amount of paid leave per PP for the 9 over 9 appointment:
   
   \[ \text{9 over 9 bi-weekly $} \times \% \text{ of paid leave} = \text{Paid leave per PP} \]
   
   \[ \$4,000 \times 30\% = \$1,200 \text{ (9 over 9 amount per PP)} \]

3. Calculate total amount of paid leave:
   
   \[ \$ \text{per PP of 9 over 9 appt} \times \# \text{ of PP of actual leave} = \text{Total paid leave} \]
   
   \[ \$1,200 \times 3\text{PP} = \$3,600 \text{ (9 over 9 total amount for paid leave)} \]

4. Calculate 9 over 12 biweekly pay rate:
   
   \[ \text{Base} \div 26\text{ PP} = \text{9 over 12 biweekly rate} \]
   
   \[ \frac{\$78,000}{26} = \$3,000 \text{ (9 over 12 biweekly pay rate)} \]

5. Calculate the amount of paid leave per PP on the 9 over 12 appointment:
   
   \[ \text{9 over 12 biweekly rate} \times \% \text{ of paid leave} = \text{9 over 12 paid leave per PP} \]
   
   \[ \$3,000 \times 30\% = \$900 \text{ (9 over 12 paid leave per PP)} \]

6. Calculate the amount of UNPAID leave per PP on the 9 over 12 appointment:
   
   \[ \text{9 over 12 biweekly rate} \times \% \text{ of unpaid leave} = \text{Unpaid leave per PP} \]
   
   \[ \$3,000 \times 70\% = \$2,100 \text{ (9 over 12 unpaid leave per PP)} \]
7. Calculate the number of PP to actually reduce Payroll (this will determine the Effective Date of leave for Distribution):

Total paid leave for 9 over 9 appt / Paid leave per PP of 9 over 12 appt = # of PP to actually reduce payroll

\[
\text{Total paid leave for 9 over 9 appt} \div \text{Paid leave per PP of 9 over 12 appt} = \# \text{ of PP to actually reduce payroll}
\]

\[
\$3,600 \div \$900 = 4\text{PP (}\# \text{ of PP to actually reduce payroll)}
\]

**IMPORTANT NOTE:** This example produced whole numbers. However, if the number of PP's produced decimals, several more calculations would need to be done (see Example 2, # 9 – #13.)

8. Set your Job Panel and Distribution dates accordingly.

**Job Data:**

11/04/02 PLA/EEE  
*(begins actual 100% leave while at 30% pay)*

12/16/02 RFL/RFL  
*(returns employee on actual return date at regular pay)*

**Distribution:**

10/21/02 LVP $900  
*(not on actual leave yet, but receives 30% paid leave. See #7 above for explanation of this 10/21/02 date)*

12/16/02 REG $3,000  
*(day after leave ends, returns employee to 100% pay)*

TUP $2,100  
*(not on actual leave yet, but stops 70% of pay)*
Example 2: A 9 over 12 employee with an base salary of $78,000 is taking an educational leave for 13 days (11/4/02 – 11/20/02) and receiving 30% pay while on leave.

1. Calculate the 9 over 9 bi-weekly rate:
   
   Bbase salary / 19.5 pay periods = 9 over 9 biweekly rate
   
   $78,000 / 19.5PP = $4,000 (9 over 9 biweekly rate)

2. Calculate the 9 over 9 Daily pay rate:
   
   9 over 9 Biweekly rate / # of days per full PP = 9 over 9 daily rate
   
   $4,000 / 10 = $400 (9 over 9 daily rate)

3. Calculate the amount of paid leave daily rate:
   
   9 over 9 daily rate x % of paid leave = $ paid leave daily rate
   
   $400 x 30% = $120 (paid leave daily rate)

4. Calculate total amount of paid leave:
   
   Paid leave daily rate x # of days of leave = Total Paid Leave
   
   $120 x 13 days = $1,560 (total paid leave)

5. Calculate 9 over 12 biweekly pay rate:
   
   Bbase $ / 26 PP = 9 over 12 biweekly rate
   
   $78,000 / 26 = $3,000 (9 over 12 biweekly rate)

6. Calculate the 9 over 12 Daily rate:
   
   9 over 12 biweekly rate / # of days per full PP = 9 over 12 daily rate
   
   $3,000 x 10 = $300 (9 over 12 daily rate)

7. Calculate the 9 over 12 paid leave daily rate:
   
   9 over 12 daily rate x % of paid leave
   
   $300 x 30% = $90 (9 over 12 paid leave daily rate)

8. Calculate the number of days to actually reduce Payroll (this will determine the Effective Date of leave for Distribution):
   
   Total $ of paid leave / 9 over 12 paid leave daily rate = # of days to actually reduce payroll (determines the Effective Date for Distribution.)
   
   $1,560 / $90 = 17.33 days (# of days to actually reduce payroll)

IMPORTANT NOTE: Since Distribution cannot process partial days, drop off any decimal numbers created. (Rounding up will result in underpayment.)
9. Calculate the daily amount for the paid leave:
   Total $ of paid leave / # of days to actually reduce payroll = Daily amount of paid leave
   \[
   \frac{1,560}{17} = \$91.77 \text{ (daily amount of paid leave)}
   \]

10. Calculate the biweekly amount of paid leave:
    Daily $ of paid leave x # of days in a full pay period = Biweekly amount of paid leave
    \[
    \$91.77 \times 10 = \$917.70 \text{ (biweekly amount of paid leave)}
    \]

11. Calculate the daily amount for the unpaid leave:
    9 over 12 Daily rate - daily amount of paid leave = Daily amount of unpaid leave
    \[
    \$300 - \$91.77 = \$208.23 \text{ (daily amount of unpaid leave)}
    \]

12. Calculate biweekly amount of unpaid leave:
    Daily amount of unpaid leave x # of days in a full pay period = Total $ of unpaid leave
    \[
    \$208.23 \times 10 = \$2,082.30 \text{ (total amount of unpaid leave)}
    \]

13. Set your Job Panel and Distribution dates accordingly.

**Job Data:**
- 11/04/02 PLA/EEE (begins actual 100% leave while at 30% pay)
- 11/21/02 RFL/RFL (returns employee on actual return date at regular pay)

**Distribution:**
- 10/29/02 LVP \$917.70 (not on actual leave yet, but receives 30% paid leave.
  To get the 10/29/02 date, count back 17 days from, and including, the last day of the actual leave.)
- 10/29/02 TUP \$2,082.30 (not on actual leave yet, but stops 70% of pay)
- 12/16/02 REG \$3,000 (day after leave ends, returns employee to 100% pay)
Partial LOA - Paid or Unpaid

The difference between a “Partial LOA” and a “Partial Pay LOA” has to do with time verses pay. That is, on a Partial LOA, the employee is NOT gone 100%, but rather works, getting paid for a percentage of time during the leave. On the other hand, an employee on a Partial Pay LOA is gone 100% of the leave, but gets paid for part of it (See Pg. 13.)

A partial leave of absence, then, is one in which the employee is working part of the time they are on leave and in doing so, they get paid for that percentage of the time they work. This can play itself out in several ways:

Partial LOA – Partial Paid
   Employee works percentage of LOA & paid (REG)
   Employee does not work other percentage (TUP)

Partial LOA – Paid
   Employee works percentage of LOA & paid (REG)
   Employee does not work, but gets paid (LVP)

Combination Partial LOA – Partial Paid & Unpaid
   Employee works percentage of LOA & paid (REG)
   Employee does not work, but gets paid for a percentage (LVP)
   Employee does not work (TUP)

As with other LOA’s for 9 over 12 employees, the dates of the actual leave must be set up on the Job Data panel and the appropriate pay dates and earnings codes must be established on the Distribution panel.

A. Partial LOA – Partial Paid

Example: A 9 over 12 employee with a Bbase of $35,000 is taking a full year LOA, but will be working 30% of the time while on leave.

1. Bbase salary ($) divided by 26 pay periods(PP) = $ per PP.
   
   $35,000 / 26 = $1,346.15

2. $ per PP x % of paid leave = $ per PP to be paid
   
   $1,346.15 x 30% = $403.85

3. $ per PP - $ per PP to be paid = $ per PP NOT to be paid
   
   $1,346.15 - $403.85 = $942.31

Job Data:

8/26/02 PLA/xxx (begins actual leave while at 30% pay)
5/26/03 RFL/xxx (returns from leave while at 30% pay)

Distribution:

6/17/02 REG $ 403.85 (not on actual leave yet, but receives 30% regular pay)
   TUP $ 942.31 (not on actual leave yet, but will stop 70% of pay)
6/16/03 REG $1,346.15 (day after leave ends, returns employee to 100% pay)
**B. Partial LOA – Paid**

**Example:** A 9 over 12 employee with a Base of $40,000 is taking a Fall semester LOA. He will be working 25% of his regular appointment and although he is not working the other 75% of his leave, he will receive funding for it.

1. Base salary ($) divided by 26 pay periods (PP) = $ per PP
   
   \[
   \frac{40,000}{26} = 1,538.46
   \]

2. $ per PP x % of paid leave = $ per PP to be paid
   
   \[
   1,538.46 \times 25\% = 384.62
   \]
   
   \[
   1,538.46 \times 75\% = 1,153.84
   \]

**Job Data:**

- 08/26/02 PLA/xxx (begins actual leave while at 25% pay)
- 01/09/03 RFL/xxx (returns from leave at 100% pay)

**Distribution:**

- 6/17/02 REG $384.62 (not on actual leave yet, but receives 25% regular pay)
- LVP $1,152.84 (not on actual leave yet, but receives 75% paid leave)
- 12/16/02 REG $1,538.46 (start of pay period 14, returns to 100% pay)

**C. Combination Partial LOA – Partial Paid & Unpaid**

**Example:** A 9 over 12 employee with Base of $51,500 is taking a full year partial paid and unpaid LOA. She will be working 30% of leave (REG). She will also be receiving 25% payment for part of the leave she isn’t working (LVP). The remainder of the time (45%) she will not be working (TUP).

1. Base salary ($) divided by 26 pay periods (PP) = $ per PP.
   
   \[
   \frac{51,500}{26} = 1,980.77
   \]

2. $ per PP x % of paid leave = $ per PP to be paid
   
   \[
   1,980.77 \times 30\% = 594.23
   \]
   
   \[
   1,980.77 \times 25\% = 495.19
   \]

3. $ per PP - $ per PP to be paid = $ per PP NOT to be paid
   
   \[
   1,980.77 - 1,089.42 = 891.35
   \]

**Job Data:**

- 8/26/02 PLA/xxx (begins actual leave while at 30% plus 25% pay)
- 5/26/03 RFL/xxx (returns from leave while at 30% plus 25% pay)

**Distribution:**

- 6/17/02 REG $403.85 (not on actual leave yet, but receives 30% regular pay)
- LVP $495.19 (not on actual leave yet, but receives 25% paid leave)
- TUP $891.35 (not on actual leave yet, but stops 45% of pay)
- 6/16/03 REG $1,980.77 (day after leave ends, returns employee to 100% pay)
**Sabbatical with Partial or Full Pay**

Sabbatical leaves are typically 100% leaves and are typically for the full term of the appointment. They can be with partial or full pay. The earnings codes used are SBL and SLU. SBL is used for the paid portion of the leave while SLU is used for the unpaid portion of the leave. As with any 9 over 12 leave, the action reason dates are set based on the actual term dates (i.e. 8/26/02 - 5/26/03). The distribution dates are set in accordance with 26 pay periods or a 12 month appointment.

**NOTE:** when establishing a leave, changes should only be made to the Action/Reason and Distribution fields.

**A. Sabbatical with Partial Pay**

For calculation method, see page 14, Full Year LOA with Partial Pay

**Example:** A 9 over 12 employee with a Bbase of $25,000 taking a full year Sabbatical with 50% pay.

1. $25,000 / 26 pp = $961.54
2. $961.54 x 50% = $480.77 (amount to be paid each PP)
3. $961.54 - $480.77 - $480.77 (amount not to be paid each PP)

**Job Data:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/26/02</td>
<td>PLA/SLB</td>
<td>(begins actual 100% leave while at 50% pay)</td>
</tr>
<tr>
<td>5/26/03</td>
<td>RFL/RFL</td>
<td>(returns from leave)</td>
</tr>
</tbody>
</table>

**Distribution:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/17/02</td>
<td>SLB</td>
<td>$480.77 (not on actual leave yet, but receives 50% paid leave)</td>
</tr>
<tr>
<td></td>
<td>SLU</td>
<td>$480.77 (not on actual leave yet, but stops 50% of pay)</td>
</tr>
<tr>
<td>6/16/03</td>
<td>REG</td>
<td>$961.54 (day after leave ends, returns to 100% pay)</td>
</tr>
</tbody>
</table>

**B. Sabbatical with Full Pay**

**Example:** A 9 over 12 receiving 100% Bbase salary or 50% of Bbase salary and 50% additional funding (supplemental funding) to total 100% of salary.

**Job Data:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/26/02</td>
<td>PLA/SLB</td>
<td>(begins actual 100% leave with full pay)</td>
</tr>
<tr>
<td>5/26/03</td>
<td>RFL/RFL</td>
<td>(returns from leave)</td>
</tr>
</tbody>
</table>

**Distribution:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/17/02</td>
<td>SLB</td>
<td>$961.54 (not on actual leave yet, but leave pay begins)</td>
</tr>
<tr>
<td>6/16/03</td>
<td>REG</td>
<td>$961.54 (day after leave ends, earnings no longer designated as leave)</td>
</tr>
</tbody>
</table>
**Multi Year Contracts (formerly Contract Pay)**

Appointments that are designated Fixed Term, Multiple Year or Special Contract (Those that are more than one year but less than 5 years - F, J, or C) are tracked on the Appointment UM panel under Administer Workforce/Use/Job Data/.

The begin date is the first day of the appointment term or the first day worked (DO NOT use pay dates). The end date is the last date of the appointment term or the last day worked.

**NOTE:** Failure to enter this information may result in incorrect information on the NOA

**NOTE:** These fields DO NOT have the functionality to start or stop pay.

**Example:** A new 9-month employee hired on a 3-year contract has chosen the 9 over 12 pay option

**Job Data:**

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Hire/EXT (new hire)</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/26/02</td>
<td></td>
</tr>
</tbody>
</table>

**Appointment UM**

<table>
<thead>
<tr>
<th>Appointment Type:</th>
<th>X (fixed term, multi-year contract – F or J)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Term:</td>
<td>BJ (9 mos/26pp – B appointment)</td>
</tr>
<tr>
<td>Multi Year Beg/End:</td>
<td>8/26/02 5/29/05</td>
</tr>
</tbody>
</table>

**Example:** A 9 over 12 employee’s Multi Year Contract has been renewed for an additional 2 years.

**Job Data:**

<table>
<thead>
<tr>
<th>Work Location</th>
<th>Data Change/Contract Renewal</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/26/02</td>
<td></td>
</tr>
</tbody>
</table>

**Appointment UM**

<table>
<thead>
<tr>
<th>Multi Year Beg/End:</th>
<th>8/26/02 05/23/04</th>
</tr>
</thead>
</table>
Special Contracts (formerly Contract Pay – Continued)

Appointments that are 9 over 12 with dates outside the appointment term date, and are coded BJC, GUC, or KWC. The begin date is the first day of actual work and the end date is the last day of the 9, 9 ½ or 10 month appointment.

**NOTE:** There should not be a break during the 9, 9 ½ or 10 months of work.

If an employee is on an A Term appointment with dates other than the payroll fiscal year dates, capture those dates in the Special Dates Beg/End fields.

**NOTE:** Failure to enter this information may result in incorrect information on the NOA

**NOTE:** These fields DO NOT have the functionality to start or stop pay.

**Example:** A 9 month employee will be working from 6/17/02 – 03/31/03 and paid over 12 months

**Job Data:**

Work Location

<table>
<thead>
<tr>
<th>06/17/02</th>
<th>Data Chg</th>
<th>Term Code Change</th>
</tr>
</thead>
</table>

Appointment UM

<table>
<thead>
<tr>
<th>Term Code</th>
<th>xxx (special dates paid over 26 pay periods – BJC, GUC, or KWC)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Multi Year Beg/End</th>
<th>06/17/02 - 03/31/03</th>
</tr>
</thead>
</table>
Pay Rate Changes & Promotions

Pay Rate changes are effective the first day of the first pay period of the new fiscal year, this includes compensation attached to Promotions. However, the Promotion’s new Job Code is effective the first day of the new appointment term. (This results in the employee being paid at the new rate of pay in the old classification, as required by Regent’s policies.) To give an employee both a pay rate change and a promotion, two separate rows should be created.

Pay Rate Changes

Job Data:
1. Insert a new row with a new effective date (the first day of the first pay period of the new fiscal year.)
2. Choose the action/reason of Pay Rate Change/Merit.
3. Insert the new pay rate on the Compensation panel.
4. Insert a new row on the Distribution panel with an effective date of the first day of the first pay period of the new fiscal year and fill in the new compensation amount.

Promotions

Job Data:
1. Insert a new row with a new effective date (the first day of the new appointment term.)
2. Choose the appropriate action/reason. If this is a promotion, Job Reclass/Promotion should be used.
3. Insert new job code on the Job Information panel.
4. Insert a new row on the Distribution panel with an effective date of the first day of the new appointment term.

Example: A 9 over 12 Assistant Professor, 9403, with a Bbase of $36,000 receives a 3.5% increase and also a promotion to an Associate Professor, 9402. His appointment term is effective Fall Semester:

Pay Rate Change - Job Data

Work Location
6/17/02 Pay Rate Change / Merit
Compensation
$36,000 x 3.5% = $1,260
$36,000 + $1,260 = $37,260
$37,260 + $1,500 (Promotion) = $38,760
$38,760 / 26 pay periods = $1,490.77 New Comp Rate

Distribution
6/17/02 $1,490.77

Promotion - Job Data

Work Location
8/26/02 Job Reclass/Promotion
Job Information
Job Code 9402
Distribution
8/26/02
Sponsored Accounts Funding & Historical Salary Adjustments

This section is under review. For questions and assistance, please call the HRMS Call Center, 612-625-2016.
**Termination Process**

9 over 12 employees who terminate employment prior to the end of the fiscal year

When a department is aware in advance of the termination of a 9 over 12 employee, care should be taken to not overpay the individual. However, in some circumstances, overpayment is unavoidable. To determine the status of payment, if the employee has been overpaid or if they are still owed compensation, the following formula should be used:

\[
\text{Amount Paid} - \text{Amount Owed (either to or from the employee)} = (9 \text{ over } 12 \text{ Comp Rate } \times \# \text{ PP already paid}) - (9 \text{ over } 9 \text{ Comp Rate } \times \# \text{ PP of 9 over 9 appt to term date})
\]

(Remember to complete the normal termination process as for any other employee filling in all the appropriate fields on all necessary panels.)

**If the Amount Paid is less than the Amount Owed:**

The University still owes compensation to the employee. The remaining payment is calculated:

\[
\text{Amount Owed} - \text{Amount Paid} / \text{remaining pay periods until termination} = \$ per \text{ PP still owed}
\]

Once the amount per pay period has been determined:

1. Insert this amount into the Distribution with a new effective date.
2. Calculate and insert the "not to be paid" portion with a TUP earnings code. This will reduce the employee’s salary by the appropriate amount.
3. Insert a new row with effective date of termination and appropriate action/reason on the Work Location panel.

**Example:** On 2/10/03, you found out that 4/4/03 will be the last day of employment for one of your 9 over 12 employees. They have a Bbase of $42,500.

a) Calculate Amount Paid

9 over 12 comp rate: $42,500 / 26 pp = $1,634.62

6/17/02 – 4/6/03 equals 21 pay periods

$1,634.62 x 21 = $34,327.02 (was paid)

b) Calculate Amount Owed

9 over 9 comp rate: $42,500 / 19.5 pp = $2,179.49

8/26/02 – 4/6/03 equals 16 pay periods

$2,179.49 x 16 = $34,871.84 (should have been paid)

c) Calculate Amount per pay period still owed until termination

$34,871.84 - $34,327.02 = $544.82 (owed beyond Regular pay. $544.82 can be inputted as a lump sum in Pay Entry during the last pay period worked OR see next step.)

2/10/03 – 4/6/03 equals 4 pay periods left to be paid

$544.82 / 4 = $136.21 (amount owed per pay period for the remaining time worked.)
Pay Entry

One lump sum of $544.82 by the Pay Entry date of 4/9/03 for pay period 3/24/03 – 4/6/03

OR

Lump sum of $136.21 by Pay Entry date of each of the last 4 pay periods, 2/10/03 – 4/6/03

Job Data

Work Location

4/5/03   Termination/XX

If the Amount Paid is greater than the Amount Owed:

The employee has been overpaid. Termination of funds should be immediate, written notice of the overpayment given to the employee as well as directions for returning the overpayment. Department should complete the “Overpayment Notification” (See below for URL) and send to Central Payroll.

The overpayment is calculated:

$ Paid - $ Owed = Overpayment

Once the overpayment amount has been determined:

1. Insert a new effective date in the Distribution with an earnings code of TUP. This will stop the full amount of the employee’s pay until the termination date.

2. Insert a new row with effective date of termination and appropriate action/reason on the Work Location panel.

Example: On 11/18/02, you are told that 12/13/02 will be the last day of employment for a 9 over 12 employee. They have a Bbase of $35,000.

a) Calculate Amount Paid

9 over 12 comp rate: $35,000 / 26pp = $1,346.15
6/17/02 – 11/18/02 equals 11 pay periods
$1,346.15 x 11 = $14,807.65 (was paid)

b) Calculate Amount Owed

9 over 9 comp rate: $35,000 / 19.5 pay periods = $1,794.87
8/26/02 – 11/18/02 equals 6 pay periods
$1,794.87 x 6 = $10,769.22 (should have been paid)

c) Calculate Overpayment

$14,807.65 - $10,769.22 = $4,038.43

Job Data:

Distribution

11/18/02   TUP earnings code

Work Location

12/14/02   Termination/XX

(Complete “Overpayment Notification” form and return to Central Payroll. Payroll will contact the department to discuss what action needs to be taken.)

URL:  http://www1.umn.edu/ohr/payroll/forms
9 over 12 employees who terminate employment at the end of the academic year

When an employee terminates at the end of the academic year in May, they will only have been paid for 24.5 pay periods (6/17/02 – 5/25/03). As a 9 over 12 employee, they should be paid for 26 pay periods and so, in this case, they will be underpaid.

Use this formula to determine the amount of salary still owed to the employee:

\[
\text{Base Salary} \times \text{(9 over 12 comp rate x 26 pp)} - \text{Amount Paid} \times \text{(9 over 12 comp rate x 24.5pp)} = \frac{\text{Total Amount Owed to the employee}}{\text{Total Amount owed to employee}}
\]

This amount should be entered on Pay Entry by the department. The Total Amount Owed will be paid out to the employee on the final check after the last pay period the employee actually worked.

Example: During the middle of Spring semester, you were informed that one of the 9 over 12 employees in your department would be terminating at the end of the semester. Their Base salary is $37,500, comp rate of $1,442.31.

a) Calculate Amount Paid
   
   \[\$1,442.31 \times 24.5pp = \$35,336.60\]

b) Base Salary - Amount Paid = Total Amount Owed
   
   \[\$37,500 - \$35,336.60 = \$2,163.40\]

Job Data:

Work Location

5/26/03 Termination/XX

Pay Entry:

Go into Pay Entry by the Job Data Entry Deadline of 6/04/03 (Spr semester ends 5/25/03, so 6/4/03 is the deadline within the last PP the employee actually worked) and enter $2,163.40 as a lump sum payment.
9 over 12 employees who choose to terminate the 9 over 12 enrollment

Once an employee chooses the 9 over 12 enrollment, they are committed to that payment option for that complete fiscal year. So while an employee may choose to terminate their 9 over 12 enrollment at some point during the year, they will have to wait until the start of their appointment during the next fiscal year to return to being paid over their appointment term. (See “Salary Payment Schedule for Enrolling/Terminating 9 Over 12- Memorandum of Agreement” http://www1.umn.edu/ohr/forms)

Example:  After being employed for 2 years, a Research Fellow chose the 9 over 12 payment option for FY 2002, 6/18/01 – 6/16/02. After 8 months, he decided he didn’t care for being paid that way and on 1/25/02 asked to be moved off 9 over 12 and back to his 9 over 9. His base salary is $31,500.

Job Data:

Work Location
   6/17/02  Data Chg / Term Code Chg (Eff Seq 0)
   6/17/02  SWB / BBA (Eff Seq 1)
   8/25/03  Return SWB / BBA
   5/23/04  SWB / BBA

Compensation
   8/25/03  $1,615.38 (returns to 9 over 9 comp rate beginning of B Term)

Appointment
   6/17/02  B Term (code previous to the 9 over 12 option)

Distribution
   8/25/03  $1,615.38