

Summer Sessions in the Budget Model

Processes and Timeline

Notes:

- Deans have authority over course offerings and resources similar to authority in regular academic year including authority to delegate to departments.
- Most Special Session timeframes differ from Summer Session 1 and Summer Session 2 timeframes because they are contingent on first instruction date of the specific course.
- The table below is for ongoing use so provides timeframes rather than specific dates.
 - Specific dates pertinent to students are posted on the Summer Sessions website https://summer-sessions.ucdavis.edu/local_resources/docs/calendar.pdf.
 - Specific dates pertinent to PPS data entry for DESII purposes (pay department is key for funding distribution based on pay department) are posted at <http://budget.ucdavis.edu/desii/index.html>.

Abbreviations and acronyms:

- AA - Academic Affairs
- A&FS – Accounting & Financial Services
- BIA - Budget and Institutional Analysis
- Deans – Dean’s Offices
- Depts - Academic Departments
- DESII – Data Editing System for Instructional Information
- ISS - International Summer Sessions
- OUR - Office of the Registrar
- SS1 – Summer Session 1
- SS2 – Summer Session 2
- SSO - Summer Sessions Office

	Action	Date or Timeframe	Description	Responsible Unit Starting 2014
1	Course Scheduling (SS1, SS2 and Special Session)	Mid- October through mid- November	OUR consults SSO and sends “call for courses” memo to deans and departmental course schedulers announcing opening of Banner access in late October and early November. Academic departments update past year data, indicate which courses and sections are to be offered, enter tentative instructors and maximum enrollments.	Deans/Depts/ OUR

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2	Course Scheduling (continued)	Mid- November through mid-June	OUR <ul style="list-style-type: none"> • closes Banner access to the departments in mid-November; therefore, to add or delete courses after mid-November, departments must submit requests to OUR at reservations@ucdavis.edu. • completes course time scheduling and room assignments 	Deans/Depts/ OUR
3	OUR releases classrooms	Early January	In January, OUR releases unassigned classrooms to Campus Events and Visitor Services; it may be more difficult to add course offerings after this release.	OUR
4	Summer Sessions Website opens for the coming year	Early/Mid- January	SSO opens the Summer Sessions website with tentative course offerings from Banner and preliminary fee and housing data. When data are official and final, BIA provides fee data, Student Housing provides housing data and other central campus offices may provide other data. SSO will update the website as soon as official final data are provided.	SSO/Student Housing/BIA
5	Summer Sessions Hiring Policy and Procedure review and Letter of Appointment Update	Early February	SSO consults with AA to learn changes in compensation, policies or procedures. SSO then sends sample Letters of Appointment to AA staff who manage labor relations (in 2013-14: Tracey Pereida, Spruce Metzger, and Barbara Aguirre): Article 23 , Article 24 , APM – 410 , APM 410 B , APM – 420 , APM 190 G , APM 600 , APM 660 , UCD-660 , APM 661 , APM 662 . SSO makes the approved sample Letters of Appointment available to departments.	SSO/AA Labor Relations
6	Summer Sessions student Application Available	March 1	SSO consults with OUR to update the student application (only visitors and non-continuing students complete the application). OUR processes all student applications. SSO: <ul style="list-style-type: none"> • hosts the student application on the Summer Sessions website • manages application content and approves verification for students who are still in high school • develops special versions of the application for 	SSO/OUR/ International Summer Session (ISS) / Summer Start

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			<p>International Summer Session (ISS) and Summer Start applicants</p> <p>OUR, ISS and Summer Start programs review and approve the submitted applications for these two special programs.</p>	
7	Instructional Appointment - Instructors & TAs & Readers	April 1	<p>SSO emails departments a “Call for Instructors” outlining procedures for using the SSO web-based business application to:</p> <ul style="list-style-type: none"> • compile data on instructional employees and other course costs • manage creation, distribution, and electronic signing of letters of appointment • generate course reports 	Deans/Depts/ Possible assistance from SSO
8	Special Session Refund Schedule	Early June	SSO provides OUR a Special Session Refund Schedule specifying a refund date for each Special Sessions course so that OUR can efficiently process student refunds.	SSO/OUR
9	Course Registration Begins	Late April/Early May	OUR opens registration for UC Davis students for SS1, SS2, and Special Session courses on a Monday in late April or early May and opens registration for other students the following Saturday.	OUR
10	Instructional Appointment - Review/PPS Entry/Onboarding	May-July; (see DESII website for specific DESII deadlines)	<p>Departments enter instructional appointments in the SSO web-based business application, which feeds into a database. The application generates letters of appointment and various reports to assist in the management of the hiring and payment process.</p> <p>Other department activities include:</p> <ul style="list-style-type: none"> • calculating compensation • recalling retired instructors • obtaining COCI approval for associate instructors to teach upper division courses • entering appointments into PPS • work-permit updates • document processing for international instructors and student employees • onboarding of summer-only employees 	Deans/Depts/ / possible assistance from SSO
11	Notify instructors and student employees of Possible Course Cancellations	Early May	Deans/departments monitor enrollments in their courses so they can notify instructors and student employees of a possible SSI or Special Session course cancellation for low enrollment classes or sections.	Deans/Depts

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12	Convey proof of employment for summer-only SS1 and Special Session employees to TAPS, Library, OUR, IET	Early June	Departments verify employment in PPS so that first time or summer-only employees can access campus facilities and services. If this is not possible, departments may be able to use a temporary affiliate access form to provide computing account and Smartsite access; the form is hosted by the campus IET office.	Deans/Depts
13	SSO provide list of Associate Instructors (AIs) to the CETL AI Training Coords	Early June	The Center for Excellence in Teaching & Learning (CETL) provides training for all summer graduate student Associate Instructors. Many times summer is the first time these instructors serve as the instructor of record. SSO identifies these instructors using the SSO web-based business application; departments that do not use the application, will be responsible for conveying list of AIs to CETL.	CETL/SSO/Depts that don't use SSO we-based ap
14	1 st Drop for Non-Payment of Fees for SS1	Mid-June	OUR drops students for non-payment of fees and places a registration "freeze" of two (2) days on ALL students to allow student to pay fees and re-register.	OUR
15	Cancel Low-Enrollment Courses for SS1	Mid-June	Deans/departments cancel courses that have not reached the minimum enrollment in accord with deadlines, minimum enrollment, and exception guidelines set by the dean. This usually occurs on the same day as 1 st Drop for Non-payment.	Deans/Depts
16	Deadline for PPS Entry for SS1	Mid-June (see DESII website for exact date)	Deans/departments enter instructor and instructional support appointments into PPS to ensure timely processing of paychecks and to meet BIA's DESII deadlines.	Deans/Depts
17	SS1 instruction begins	Mid/late-June	--	--
18	SS1 Payday # 1	July 1	First pay date for SS1. Instructional employees are paid for days worked in June based on PPS data.	A&FS Payroll
19	Last day for SS1 students to cancel/withdraw class with full refund	Late June/Early July (see Summer Session website for exact date)	After this date, students must submit appeal to OUR to drop a class and receive a full refund.	Students/OUR
20	2 nd Drop for Non-Payment of Fees for SS1	Early July	OUR drops students for non-payment of fees and withdraws them from the term.	OUR

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	Action	Date or Timeframe	Description	Responsible Unit Starting 2014
21	SS1 Census Date	End of second week of instruction → Mid-July	After close of business, BIA takes a snapshot of Banner census data to capture enrollment (total number of registered and paid students). BIA will use this data to calculate funding distribution.	BIA
22	Reconcile PPS with SSO web-based business application for SS1	Mid-July	Departments should reconcile PPS data (PPS decision report 6) with SSO web-based business application data to ensure accuracy of the SSO ap data. Only active appointments show up on the PPS 6.	Depts
23	Notify instructors and student employees of Possible Course Cancellations for SS2	Early July	Deans/departments monitor enrollments in their courses so they can notify instructors and student employees of a possible SS2 or Special Session course cancellation for low enrollment classes or sections.	Deans/Depts
24	1 st Drop for Non-Payment of Fees for SS2	Mid-July	OUR drops students for non-payment of fees and places a registration “freeze” of two (2) days on ALL students to allow student to pay fees and re-register. (Note: This action occurs earlier in the timeline for SS2 due to Banner financial deadlines always occurring mid-month.)	OUR
25	Convey proof of employment for summer-only SS2 employees to TAPS, Library, OUR, IET	Mid-July	Departments verify employment in PPS so that first time or summer-only employees can access campus facilities and services. If this is not possible, departments may be able to use a temporary affiliate access form to provide computing account and Smartsite access; the form is hosted by the campus IET office.	Deans/Depts
26	Cancel Low-Enrollment Courses for SS2	Late July	Deans/departments cancel courses that have not reached the minimum enrollment in accord with deadlines, minimum enrollment, and exception guidelines set by the dean. This usually occurs the Tuesday before the first day of class for SS2.	Deans/Depts
27	Deadline for PPS Entry for SS2	Late July (see DESII website for exact date)	Deans/departments enter instructor and instructional support appointments into PPS to ensure timely processing of paychecks and to meet BIA's DESII deadlines.	Deans/Depts
28	SS1 Payday # 2	August 1	Second pay date for SS1. Instructional employees are paid for days worked in July based on PPS data.	A&FS Payroll
29	SS2 instruction begins	Early August	--	--

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	Action	Date or Timeframe	Description	Responsible Unit Starting 2014
30	Reconcile PPS with web-based business application for SS2	Mid-August	Departments should reconcile PPS data (PPS decision report 6) with SSO web-based business application data to ensure accuracy of the SSO ap data. Only active appointments are included in PPS 6.	Depts
31	Last day for SS2 students to cancel or withdraw class with full refund	Mid-August (see Summer Session website for exact date)	After this date, students must submit appeal to OUR to drop a class and receive a full refund.	Students/OUR
32	2 nd Drop for Non-Payment of Fees for SS2	Mid-August	OUR drops students for non-payment of fees and withdraws them from the term.	OUR
33	SS2 Census Date	End of second week of instruction →Mid-August	After close of business, BIA takes a snapshot of Banner census data to capture enrollment (total number of registered and paid students). BIA will use this data to calculate funding distribution.	BIA
34	SS1 Payday #3 / SS2 Payday # 1	September 1	First pay date for SS2; third pay date for SS1. . Instructional employees are paid for days worked in August based on PPS data.	A&FS Payroll
35	SS2 Payday #2	October 1	Last pay date for SS 2. Instructional employees are paid for days worked in September based on PPS data. Typical last Summer Sessions pay date with few exceptions (i.e. some recalls)	A&FS Payroll
36	Separate Summer-only Employees from PPS	October 1	Departments separate any summer employees with no future appointments in PPS rather than wait for the I-4 process, which automatically separates employees after four (4) months of no PPS activity).	Depts