

## APPENDIX A:

### UOEAP Financial Arrangements and Procedures Matrix for Study Center Directors

*Procedures reviewed regularly and subject to change.*

Description of Payment or Benefit (1)	Taxable Yes/No (2)	Procedures and Documentation Required	Type of Payment/ Timing of Payment	Contact at UOEAP
<b>Salary Items</b>				
<b>Regular salary</b>	Yes	<p>SC Directors remain on their home department's payroll for the duration of their appointment and receive their regular salary.</p> <p><i>Benefits continue to be administered by each campus Human Resources and Benefits Offices.</i></p> <p>No action needed by SC Director.</p>	<p>EAP transfers replacement salary to the home department (equal to Assoc. Prof. I).</p> <p>Payments begin after start of appointment.</p> <p>Regular payroll cycle</p>	<p>Dennis Dent <a href="mailto:ddent@eap.ucop.edu">ddent@eap.ucop.edu</a></p>
<b>Fiscal Year Salary Differential</b>	Yes	<p>Stipend compensation is calculated based on the difference between the appointee's academic year salary and corresponding fiscal year salary. The stipend amount for partial-year appointments is prorated according to the number of service months in residence.</p> <p>No action needed by SC Director.</p>	<p>Payment is through home department payroll (EAP transfers funds to the home department).</p> <p>Reimbursement for the fiscal year is made lump sum after start of appointment .</p>	<p>Dennis Dent <a href="mailto:ddent@eap.ucop.edu">ddent@eap.ucop.edu</a></p>
<b>Relocation Expenses</b>				
<b>Relocation Costs</b>	No	<p>Eligible Expenses for Reimbursement: airfare at lowest economy rate per UCLA Travel quote according to appointment letter departure and arrival destinations; transportation to/from airport; Visa, Work Permit and Inoculation costs; and shipping/moving/storage expenses, including excess baggage charges up to limit established by UOEAP policy.</p> <p>For airfare: SC Accountant is first contact. Tickets can be purchased by UCLA Travel. If SC Director purchases own airfare, to ensure reimbursement, a quote from UCLA Travel must be obtained in writing <u>prior</u> to any purchase, and reimbursement from UOEAP will be up to the amount of the UCLA Travel quote for the lowest economy fare according to appointment letter departure and arrival destinations.</p> <p>Actual receipts from licensed/bonded vendors are required and must be submitted to the UOEAP Study Center Accountant. Use <b>Relocation Reimbursement Request form</b> <a href="http://eap.ucop.edu/common/Forms/relocation_reimbursement_request.xls">http://eap.ucop.edu/common/Forms/relocation_reimbursement_request.xls</a></p>	<p>Reimbursement is made to SC Director by check after start of appointment, lump sum, after submission of all receipts.</p> <p>If SC Director purchases own tickets, reimbursement will be by check after completion of travel.</p>	<p>UOEAP Study Center Accountant <b>(3)</b></p>

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<b>Housing and POST Allowance</b>				
<b>Temporary Housing</b> (more than 30 days but less than 12 months) – Faculty on short term teaching assignments	Yes	May only be offered to employees with assignments of less than one year on travel status. By agreement only. Reimbursement is based on actual expenses up to limit indicated in appointment agreement.  Actual receipts are required and must be submitted to UOEAP Study Center Accountant.	Reimbursement is made to EAP instructor by check, lump sum, after completion of appointment and submission of all receipts.	UOEAP Study Center Accountant <b>(3)</b>
<b>Housing Allowance:</b> – SC Directors	Yes	Reimbursement is based on Housing & Post Allowance rates.  Actual receipts are required and must be submitted to UOEAP Study Center Accountant. Use <b>Housing Allowance Request form</b> <a href="http://eap.ucop.edu/common/Forms/Housing_allowance.pdf">http://eap.ucop.edu/common/Forms/Housing_allowance.pdf</a>	Payment is through home department payroll (EAP transfers funds to the home department).  Reimbursement for the fiscal year is made lump sum after start of appointment and after submission of all receipts.	UOEAP Study Center Accountant <b>(3)</b>
<b>POST Allowance</b> – SC Directors	Yes	Reimbursement is based on Housing & Post Allowance rates.  No action needed by SC Director.	Payment is through home department payroll (EAP transfers funds to the home department).  Reimbursement for the fiscal year is made lump sum after start of appointment and typically included with the housing allowance.	UOEAP Study Center Accountant <b>(3)</b>
<b>Education Allowance</b>				
Education Allowance of \$3,000 per child per year for SC Director's minor (under 18 years of age)	Yes	Proof of enrollment is required and must be submitted to UOEAP Study Center Accountant.	Payment is through home department payroll (EAP transfers funds to the home department).	UOEAP Study Center Accountant <b>(3)</b>

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child(ren).			Reimbursement for the fiscal year is made lump sum after start of appointment and submission of proof of enrollment.	

#### **Footnotes:**

**Unless otherwise noted, the authoritative source for policy information is provided in the EAP Faculty Handbook Section Two: Compensation.**

- (1) Information on employee health, welfare, and retirement benefits is not included in this summary.
- (2) "Taxable" means UC is required to withhold federal and state income tax and deductions for employment taxes from payment. In addition, certain payments may be subject to departmental assessments for worker's compensation insurance and unemployment insurance. Payment amount and withholdings are reported on employee's Form W-2 in the year benefits received. Amounts paid to non-resident alien employees claiming treaty benefits are reported on a Form 1042-S instead of a Form W-2. Source: [www.tax.ucla.edu/ucla](http://www.tax.ucla.edu/ucla) recruiting incentives summary.

#### **(3) UOEAP Study Center Accountants:**

Diana Abrams	<b>Chile, Hungary, Spain, Thailand</b>	<a href="mailto:dabrams@eap.ucop.edu">dabrams@eap.ucop.edu</a>
Janet Brown	<b>Costa Rica, Hong Kong, Italy, Russia</b>	<a href="mailto:jabrown@eap.ucop.edu">jabrown@eap.ucop.edu</a>
Pearl Chou	<b>Canada, China, India, South Africa, Taiwan</b>	<a href="mailto:pchou@eap.ucop.edu">pchou@eap.ucop.edu</a>
Antonette Escarsega	<b>Brazil, Japan, Mexico, Turkey, Vietnam</b>	<a href="mailto:aescarsega@eap.ucop.edu">aescarsega@eap.ucop.edu</a>
Justine Meyr	<b>Barbados, France, Ghana, Scandinavia (Sweden/Denmark)</b>	<a href="mailto:jmeyr@eap.ucop.edu">jmeyr@eap.ucop.edu</a>
Gunn Toms	<b>Egypt, Korea, Netherlands, New Zealand, Singapore</b>	<a href="mailto:gtoms@eap.ucop.edu">gtoms@eap.ucop.edu</a>
Rachel Wilson	<b>Australia, Germany, Israel, United Kingdom</b>	<a href="mailto:rwilson@eap.ucop.edu">rwilson@eap.ucop.edu</a>