

Office of the Provost and
Senior Vice Chancellor
for Academic and
Student Affairs

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MEMORANDUM

TO: Deans
EPA Personnel Clerks

FROM: Marilyn Sheerer
Provost and Sr. Vice Chancellor
for Academic Affairs

DATE: September 7, 2011

SUBJECT: Instructions for the 133% Form

To provide for better accounting of requests for additional pay for faculty and to ascertain compliance with the 133% maximum allowable pay as adopted by the Faculty Senate, attached is an updated form to be used effective immediately for all requests for fiscal year 2011-2012. Please add all prior overload approvals for each individual during this academic year. Also attached is a file which contains examples of different scenarios - requests that are 1) EXCEEDS ALLOWABLE; 2) OK to Process; 3) 12-Month Faculty Permission Required.

Guidelines for using this form are as follows:

1. The form is to be submitted prior to the effective date of any duties which would result in a request for additional pay.
2. Data entry is allowed in the light yellow cells only. The form is password protected to prohibit changes to the various formulas contained within.
3. Enter the date in numeric characters, i.e., 8/22/12. The cell (C6) is formatted to spell the date out as is customary in a memorandum.
4. **Fiscal Year** is a required field. This form is to be updated throughout the fiscal year and resubmitted as appropriate.
5. **Name, Banner ID, and Home Dept** are self-explanatory. Enter the nine digits of the Banner ID starting with "B".
6. Select the employee's current contract period from the drop down box in cell (M11) and enter their annual base salary on the appropriate line.
7. **Term** contains a drop down box for selecting the appropriate term - SS2 (second summer session), Fall, Spring, or SS1 (first summer session). A selection must be made for the formulas to work properly.

8. **Type of Pay** also contains a drop down box for selecting the appropriate request. The options are: one-time payment (1XPay), overload (OVLD), Distance Education Summer School (DE 1SS, DE 2SS, DE 3SS [11-week]), Summer School (1SS, 2SS, 3SS [11-week]), summer stipend, supplemental pay, and stipend. Again, a selection must be made for the formulas to work properly.
9. **Current SCH Course Load:** Please enter the faculty member's current workload indicating the number of credit hours for courses taught at the undergraduate or graduate level or reassigned for research and/or administrative duties. The semester total is calculated as the sum of undergraduate, graduate and reassigned credit hours.
10. **Dates of Service** is self-explanatory.
11. **Banner FOAP** is the funding source to be charged for the additional pay request.
12. **Amount Requested** is self-explanatory.
13. **Justification:** Please provide a brief explanation of and need for the duties to be performed.
14. **Date of Prior Provost Approval** is to be entered upon return receipt of the approved request. Entry of a date will result in a change of font from regular print to italic print. This formatting change will assist in the expeditious processing of future requests for this individual as this form is to be added to and resubmitted as appropriate throughout the fiscal year (second summer session, fall, spring, and first summer session).
15. The form is formatted to print on letterhead stationary and is to be submitted via hard copy with original signatures only. (NOTE: Printing on a color printer is fine although black and white works equally as well with the light yellow showing as pale gray shading.)
16. The Provost-approved form must accompany the EPAF when submitted for processing of the payment. Requests submitted without this form will be delayed.

The **Term Totals** are calculated based on the information keyed into the table which serves as a database. The amounts indicated in the **Max Allowable Above Contract per Fiscal Year** section are provided for your information only. Those amounts are calculated on the annual salary as indicated for the employee.

Thank you for your assistance and if there are questions or concerns, please contact Janice Bowen of my office at 328-1423.

MS/jsb

Attachments (4)

cc: Janice Bowen