

UCSF HR Billing Procedures

Billing Contacts

For all questions, please email UCSF-HR-Billing@ucsf.edu.

Fiscal Year 17-18 Funding Model Changes

1. Population category rates will increase by 3% for FY18
2. New population category of MSP Clinicians with concomitant WOS appointments added (in prior years this group had been captured under the Staff population category) – see subcommittee recommendations for details on why this population was added.

FY 17-18 Population Pricing

Population	Headcount Weight	Price for FY 17-18
Faculty, Paid	1.0	\$1,374
Faculty, Other WOS	1.0	\$1,374
Faculty, WOS Emeritus without Recall	0.0	-
Faculty, Volunteer Clinical	0.2	\$276
Faculty, Volunteer Research	0.2	\$276
Non-Faculty Academics	0.8	\$1,099
Post Docs	0.8	\$1,099
Staff	0.8	\$1,099
Graduate Students	0.1	\$138
NEW: MSP Clinicians with concomitant WOS appt.	1.0	\$1,374

Billing Procedure for FY 17-18

1. Preliminary headcounts were sent to departments in November. Departments were asked to send in their expected headcount changes by December 1, 2016
2. UCSF HR sends departments' headcount and billing charges (in spreadsheets) for FY 17-18 in February.
 - a. Bills will be based on the headcount of each department identified by the Home DeptID of the employee.
 - b. **Exception:** Organized Research Units – the alternate DeptID will override home DeptID.
3. **UCSF HR will send departments an Excel spreadsheet by May 1 to collect the chartstring information for the FY18 bill, including collecting a default chartstring to use should any chartstrings fail during the year. The sheet will be due back to HR Billing by May 31.**
4. UCSF HR commences FY17-18 monthly billing starting Fiscal Month July. After June close UCSF HR will publish the departments' headcount and billing charges in the SRS billing module in July and will enter the funding information collected in May.
5. Departments are responsible for entering any funding changes into that SRS billing module that are needed after the July bill has been entered into the SRS billing module by HR Business Services.

Headcount Population Definitions: Headcount population is determined by a variety of codes.

- **Personnel Program Codes** determine Academic vs. Staff.
- **CTO Codes** determine Faculty vs. Non-Faculty Academics vs. Post Docs.
- **Paid status** (an employee with a paid appointment or not) determines the Paid Faculty vs. WOS Faculty.

- **Title Codes** determine the WOS status:
Volunteer Clinical Faculty vs. WOS Emeritus Faculty without Recall and All other WOS faculty.
- The Paid Faculty population is determined by the paid status of the faculty.
If a faculty member has any paid appointment, the faculty will be considered paid faculty.
- The Without-Salary (WOS) Faculty population
(Volunteer Clinical Faculty, WOS Emeritus Faculty without Recall and All other WOS Faculty)
is determined by title codes. The specific title codes are shown in the table below.

References

Personnel Program Codes: <http://www.ucop.edu/payroll/DD/EDB/EDB2007.HTML>

Class Title Outline (CTO): <http://www.ucop.edu/payroll/DD/TCT/TCT1070.HTML>

CTO and Title Code table: <http://ucop.edu/academic-personnel-programs/files/acad-title-codes/academic-titles-tc-sorted-cto.pdf>

	Personnel Program Code	CTO Codes (First Digit)	Paid Status	Title Codes
Paid Faculty	A	0, 1, 2, 3	Paid	
Without Salary (WOS) Faculty	A	0, 1, 2, 3	Unpaid	
Volunteer Clinical Faculty	A	0, 1, 2, 3	Unpaid	2017, 2037, 2057, 2077, 1676
*Volunteer Research Faculty (Manually determined by departments and Service Centers)	A	0, 1, 2, 3	Unpaid	3289, 3279, 3269, 3259
WOS Emeritus Faculty without Recall	A	0, 1, 2, 3	Unpaid	1132, 3249, 3800
All other WOS Faculty	A	0, 1, 2, 3	Unpaid	All other title codes
Non Faculty Academics	A	5, 6, 9, S	n/a	
Post Docs	A	CTO = 575	n/a	3252, 3253, 3254
Staff	1, 2	n/a	n/a	
Graduate Students	A	426, 436, 456	n/a	2312, 2313, 2863, 3266, 3282, 9189
MSP Clinicians	1,2	n/a	n/a	0768, 0769, 0770, 0771, 0772, 0773, 0774, 0775, 0776, 0777, 0778, 9187

Budget Office Guidance

- The UCSF HR Billing charges are reapportionments because they are mandatory charges.
- Departments may not opt out of the charge.
- **UCSF HR Billing charges are *not* appropriate for federal contracts.**
- UCSF HR Billing charges are appropriate for state contracts.
- UCSF HR Billing charges' appropriateness for other grants and contracts are determined case-by-case.
Please contact the Budget Office for specific guidance.

Billing Departments

- Departments are defined as DeptIDs no lower than level 4, or 2 levels below control points.
- Departments may submit as many chartstrings as desired for each of the Level 2 to Level 4 DeptIDs.

Billing NCAs

Fiscal Year 17-18:

Debit 435125 Recharge UCSF HR Billing

Credit 495125 Recharge UCSF HR Billing