

The University of Wisconsin System

Administrative Policy:



SUBJECT: Overload Payments and Temporary Base Adjustments for Faculty, Academic Staff, and Limited Appointees

Original Issuance Date: July 1, 2014

Last Revision Date: April 25, 2014 (Approved By Chancellors)

1. POLICY PURPOSE:

The purpose of this policy is to provide for consistent and coherent application of overload payments and temporary base adjustments for faculty, academic staff, and limited appointees among all UW System institutions.

2. POLICY BACKGROUND/HISTORY:

Effective July 1, 2013, [Wis. Stat. § 16.417\(2\)\(f\)](#) states that the \$12,000 overload cap does not apply to individuals employed by the UW System *but only with respect to compensation received within the system*. The \$12,000 cap continues to apply for compensation earned by a UW System employee at any other state agency, although it does not apply to compensation earned at private organizations.

3. POLICY:

The salary received by full-time faculty, academic staff, and limited appointees is considered to be full compensation for all work during the period of appointment. Faculty, Academic Staff and Limited Appointees exempt from the provisions of the Fair Labor Standards Act are expected to expend the total effort necessary to complete their assignments without additional compensation. The chancellor or designee may approve increased compensation in the form of an overload payment in cases where a temporary assignment is undertaken at another UW System institution, or an individual is asked to assume additional short-term responsibilities.

In general, options such as adjustments in the employee's other duties in order to release time to meet new responsibilities; a temporary base adjustment; or a purchase-of-load arrangement in which funds are transferred into an employee's department or unit as a purchase of institutional time from the department or unit should be considered before overload payments are granted.

However, there are instances in which asking an employee to do more than his/her appointment requires is the only viable alternative and overload compensation is appropriate. There may also be other situations in which the individual is asked to assume, on a temporary basis, different duties and responsibilities within the full time appointment period such that the base salary for performing those functions needs to be examined. (See below for temporary base salary adjustments.) **Note:** An overload is not permissible for an employee who is paid in some part on

a federal grant unless it is agreed upon in the grant proposal document approved by the granting agency, or unless the granting agency approves the specific overload circumstance in writing. ([OMB circular A-21 J.10.d\(1\).](#))

Institutions are encouraged to develop institution specific overload policies within this UW System policy.

A. Overloads

- (1) Overload payments may be made where with the consent of the employee, substantial additional work requirements are added to the existing duties of a full-time employee creating a workload in excess of 100% of the employee's time and the performance of these additional duties is unusual, short-time or nonrecurring in nature
- (2) Overload payments may also be made where a full-time employee of one UW System institution accepts an institution-approved part-time appointment to perform duties at another UW System institution in addition to his/her full-time position (Financial Administration: [Inter-institutional Financial Transactions \(F-18\)](#) details the procedures for payment between institutions).
- (3) If a staff member is not full-time, additional compensation is not considered an overload.
- (4) Overload payments must be approved, in advance, by the chancellor or designee.
- (5) Overload compensation may not exceed the higher of either 20 percent of the employee's academic (c-basis/9 month) or annual (a-basis/12 month) or \$18,000 unless the chancellor or designee determines that good cause exists to exceed this threshold and issues an exception in writing.
- (6) Overload maxima are calculated on a fiscal year basis.
- (7) Summer compensation (see [Financial Policy F19](#) for the calculation of summer salary) for academic year (c-basis/9-month) employees is not considered an overload for the purposes of this policy.

B. Temporary Base Salary Adjustments:

Temporary base salary adjustments should be utilized in cases where an employee is appointed in an acting or interim capacity, or to assume temporary responsibilities that are significantly different from those of the employee's current position. These adjustments do not constitute overload payments. The level of the base salary adjustment appropriate for the new assignment is determined pursuant to [UPG 4.08](#).

C. RELATED DOCUMENTS:

Unclassified Personnel Guidelines 4.08
Inter-institutional Financial Transactions F-18