# UC San Diego Academic Recall Guidelines

| Policy |
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| The below procedures outline the requirements for requesting an academic recall appointment and are in alignment and reflective of local and systemwide policy.<br><br>• [UC San Diego Policy and Procedure Manual (PPM) Section 230-205, Appointment Promotion, Recall for Academic Appointees](#)<br><br>• [University of California Academic Policy Manual (APM) Section 205, Recall for Academic Appointees](#)<br><br>Academics may be recalled to perform teaching, research, and/or administrative service duties if there is a departmental need and adequate funding.  A minimum 30-day break in service after the date of retirement is required before a recall appointment begins.<br><br>Recall appointments are approved for one year at a time and are self-terminating.  In cases where an academic is engaged in a long-term research project with secure funding, sequential appointments may be proposed. Recalls of up to three years may be submitted if in conjunction with the Pathways to Retirement Program.<br><br>The maximum compensation limit is 43% per month of the individual's salary at the time of retirement (range adjusted to current dollars).  This limit applies to appointments at any UC campus during a rolling twelve-month period.<br><br>Recall appointments are not an entitlement and are contingent upon funding and programmatic considerations. Recalled appointees are not eligible for merit or promotion increases.<br><br>Departments may enter into pre-retirement recall agreements under the Pathways to Retirement Program with faculty who are age 60 or older and have at least five years of UCRP service credit Pathways to retirement plans that include supplemental funding from the Executive Vice Chancellor and/or space allocations must be approved by the Executive Vice Chancellor–Academic Affairs (route via the Associate Vice Chancellor–Resource Administration). |

| Authority |
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| Per UC San Diego Delegation of Authority 3045, the Executive Vice Chancellor–Academic Affairs has approval authority for standard academic recall requests provided such appointments are not in conflict with the terms of the University of California Retirement Plan and/or University Policy.<br><br>Though exceptional requests are discouraged, such requests will be considered in appropriate circumstances.<br><br>Per US San Diego Delegation of Authority 2684, non-standard (exceptional) requests will be elevated to the Chancellor for review and may include, but are not limited to:<br><br>• Proposals for an academic recall appointment greater than 43% time,<br><br>Exceptional requests must be accompanied by a memo addressed to the Chancellor. |

| Types of Appointments | |
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| **Teaching** | Recall rates for teaching may be negotiated between the department and the faculty member.  Most often, the compensation is established as a negotiated rate but it can be established on a percentage basis. |
| **Research** | Recalls for research must be established on a percentage basis to ensure appropriate effort reporting.  The pay rate should match the salary and step at the time of retirement, range adjusted to the current scale.<br><br>*The NIH salary cap will apply if the base salary is greater than the cap.* |
| **Administration** | Administrative recalls are generally established on a percentage basis. |

| Benefits | |
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| Recalls must sign and submit the UCRP Retired Employee Election form to the UCSD Benefits Office prior to service (not required for retirees who elected the lump sum cash out option).   The form is available at the UCSD Benefits Office (Phone: 858-534-2816 or Email: benefits@ucsd.edu)<br><br>The following online publications related to retirement and return to work may be found on the UCNet website:<br><br>▪   Returning to UC Employment After Retirement Factsheet<br><br>▪   Retirement Handbook | |

| Responsibility and Oversight | |
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| **Recalled Employee** | • Disclose all UC recall appointments to home department and any other appointing departments/campuses to ensure 43% monthly recall limit is not exceeded<br><br>• Review recall-related publications on UCnet and At Your Service<br><br>• Contact the Benefits Office if there is any question regarding the effect of the recall on retirement benefits<br><br>• Acknowledge and sign UCSD Academic Recall Appointment form via Kuali |
| **Home Department** | • Advise employee regarding recall process and assist with benefits issues<br><br>• Verify employee's recall status (check for other appointments)<br><br>• Complete and submit UCSD Academic Recall Appointment form to cognizant dean's office via Kuali<br><br>• Enter approved recall in UCPath |
| **Appointment Department (if not Home Department)** | • Inform employee's home department of your intention to recall the employee<br><br>• Complete and submit UCSD Academic Recall Appointment form to the employee's home department via Kuali<br><br>• Enter approved recall in UCPath |
| **Division/School Dean's Office** | • Provide policy and procedure guidance to departments<br><br>• Obtain dean's signature on the UCSD Academic Recall Appointment form via Kuali form<br><br>• Advance completed form via Kuali for your AP Analyst |
| **Academic Advancement Unit at APS** | • Manage approval, exception, and notification process via Kuali<br><br>• Ensure appointment is entered in AP Data<br><br>• Advise divisional deans offices as necessary |

| Summer Session Recall Appointments | |
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| The Associate Vice Chancellor of Undergraduate Education will approve Summer Session teaching recalls in lieu of the school deans. | |

| Intercampus Academic Recall Appointments | |
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| If a department proposes to recall an academic who retired from another UC campus, the department should notify the home campus of the proposed appointment and obtain the necessary information to complete the *Employee Information* and *Status at Time of Retirement* sections of the Academic Recall Form.  Coordination between campuses is imperative to ensure that the maximum annual compensation limit is not exceeded.<br><br>A Temporary Intercampus Appointment form must accompany the Academic Recall Form to facilitate payment. More information on intercampus payments is available. | |

| Completing an Academic Recall Form |
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| **Employee Information** |

1. Enter Employee ID

2. Enter Name [format: John W. Smith]

3. Enter Home Campus from drop down menu (default is UC San Diego)

4. Enter Home Department (abbreviate if necessary)

5. Enter Retirement Date (MM/DD/YYYY)

| **Pre-Retirement Information** | |
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| **GC/SIO Pre-Retirement Information** | 1. Enter title, rank, and step pre-retirement<br><br>2. Enter annual salary pre-retirement<br><br>3. Enter Scale Date for pre-retirement annual salary<br><br>4. Enter pre-retirement appointment basis (AY or FY)<br><br>5. Enter pre-retirement scale type (Choose Standard if individual was not on an individualized scale) |
| **HS Pre-Retirement Information** | 1. Enter title, rank, and step pre-retirement<br><br>2. Enter Total Negotiated Salary pre-retirement<br><br>3. Enter Scale/APU pre-retirement |

**Proposed Recall Appointment**

1. Enter recall appointment school

2. Enter recall appointment department

3. Enter recall appointment begin and end date

4. Select the recall appointment purpose (select all that apply)

5. Enter a description of the recall duties:

   *Departments and schools should use this section of the form to state the full purpose and duties of the proposed appointment and how they support the University's priorities and goals. Additionally, if the proposed academic recall appointment is for the renewal or continuation of a recall appointment, departments and schools should provide the reason for proposing a sequential appointment.*

6. Enter the funding source for the academic recall appointment

7. Specify whether the funding sources is core or non-core funds

8. Enter funding source details

9. Answer the following questions. Please note, incomplete answers may result in a delay to the processing of the RTAD.

   - *How much external funding does the candidate already have in place?*

   - *There is sufficient non-core funding to support this RTAD appointment (yes/no)*

   - *How much indirect cost recovery will the individual generate during the RTAD period? (If not applicable, please write N/A)*

   - *What space, if any, is being allocated to support the individual's research and by what process/criteria such allocations were determined.*

- *How many graduate students and/or postdocs, if any, are being supported by the individual's external research funding.*

- *If there are administrative and/or teaching duties, what are the department's long-term plans for the role(s)?*

10. Enter course information for academic recall appointments with teaching duties

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| **GC/SIO Proposed Recall Appointment** | 1. Enter the proposed annual salary [Generally the annual salary at the time of retirement range adjusted to the current scale; this is the figure used to determine the annual 43% recall limit. If a non-salaried appointment, enter "0" or "non-salaried"]<br><br>2. Enter the proposed annual salary scale date<br><br>3. Enter the proposed recall appointment percentage of time [0% for non-salaried appointments; may be variable, leave blank for teaching recalls based on per course rate]<br><br>4. Enter the total annual compensation [total cost of the proposed recall]<br><br>5. Select the proposed appointment title |
| **HS Proposed Recall Appointment** | 1. Enter Covered compensation [Minimum salary range adjusted to the current HSCP Scale]<br><br>2. Enter Requested Annual Salary [Salary rate not to exceed exiting total negotiated salary]<br><br>3. Select the proposed appointment title |

## Retiree Acknowledgements

1. The retiree must read all boxes in this section.

2. The retiree must declare any other recall appointments held on a UC campus within the past twelve months. The 43% monthly compensation limit includes earnings at all UC campuses. It is the department's responsibility to confirm the individual's recall dates and earnings at the other department or campus.

3. The retiree's signature is an acknowledgement that he/she accepts the recall appointment as proposed and understands the limitations noted on the form.

## Recommendation and Approval

1. Hiring Unit (Applies to Primary and Secondary Departments for Joint Appointments)

   - Department **=** Department Chair

   - College Program **=** Provost

   - Other Program (Not Within a Department) **=** Director

   - ORU/MRU **=** Director

2. Dean, Associate VC, VC-ORU, VCHS, VCMS

   - Hiring unit is department/program **=** cognizant dean (VCHS for Health Sciences or VCMS for SIO)

   - Hiring unit is a college **=** Associate VC-UG Education

   - Hiring unit is ORU/MRU **=** VC-Research

The UC San Diego Academic Recall Form should be submitted via Kuali to expedite processing.

Approval notifications will be sent to schools or units via email through Kuali to applicable department head(s) and Dean/Assoc VC/VC(s).