

ONE TIME PAYMENTS

SCHOOL OF MEDICINE
ACADEMIC AFFAIRS

FEBRUARY 2024

AGENDA

- Types of One Time Payments
 - Honoraria
 - Faculty Consultant
 - Award or Prize
- Approvals
- SOM Procedures
- Job Title/Job Desc/Earn Code
- Resources
- Let's Review

ONE TIME PAYMENTS

A One-Time Payment (OTP) is additional compensation provided to an academic appointee for occasional service or activities that fall outside of the appointee's normal responsibilities. These payments are governed by specific policies and not all additional services/activities are eligible for additional compensation.

Specific circumstances are outlined in the salary administration section of the [Academic Personnel Manual](#).

Eligible one-time payments are listed in [APP 9-10](#). Activities or services that do not fall under the outlined categories will require exceptional approval.

ONE TIME PAYMENTS

HONORARIA (*most common)

Description A payment by the University to an academic appointee for lectures or similar public appearances that fall outside the appointee's normal academic responsibilities to the University ([APM 666](#))

Types of Honoraria

1. Lectures and seminars (performed at a UC campus other than the appointee's home campus)
2. Concerts, creative activities or University sponsored panels/conferences (performed at any UC campus)

Eligibility: All Academic appointees

Restriction: Cannot be paid using state general funds

Final Authority: Vice Provost, Academic Personnel, or UCOP (depending on amount)

ONE TIME PAYMENTS

Awards or Prizes

Description A payment to an academic appointee for winning an award or prize. The award or prize must be the result of a competitive process. Established award programs only, not ad hoc.

Eligibility: All Academic appointees

Restriction: No State General Funds

Final Authority: Vice Provost, Academic Personnel

Examples: Best Teaching or Poster Presentation Awards

ONE TIME PAYMENTS

Faculty Consultant (*not very common)

Description A payment to a faculty member for occasional consultant services on projects, conducted under the auspices of the University, that fall outside the appointee's normal academic responsibility (see [APM-664](#)). This allows the University to engage a faculty member for their expertise instead of hiring an outside entity

Eligibility: Faculty titles as defined in [APM 110-4-15](#) from any UC Campus

Final Authority: Vice Provost, Academic Personnel

APPROVALS

- **ALL** One-Time Payments must be approved by (1) the SOM Dean's Office (Finance), and (2) the Office of Academic Personnel* **prior to the activity taking place** (*for payments to UC appointees only)
- Exceptional requests are reviewed on a case-by-case basis, taking into consideration academic personnel policy
- For all inter-campus one-time payments, the host campus must notify the home campus of the activity in advance of the activity being performed

Any request received after the activity has taken place will be reviewed on a case-by-case basis **and may be denied**

SOM PROCEDURES

- Overview of SOM Procedures: Honoraria and Awards
- SOM Recommended Honoraria Amounts
- Procedures: Honoraria for Non-UC Speakers
- Procedures: Honoraria for Non-UC Appointees
- Procedures: Award or Prize

OVERVIEW OF PROCEDURES: HONORARIA AND AWARDS

(1) Each honorarium request must be pre-approved by the Dean of the School of Medicine and requires a memo to be signed prior to offering an honorarium to a guest.

(2) Honorarium requests for faculty from another UC campus must also then be pre-approved by Academic Personnel via UPAY form U560/644

(3) Awards do not require pre-approval from either the Dean of School of Medicine, or the Vice Provost but do require signature by the Assoc. Dean and VP on the AP-70 form

SOM RECOMMENDED HONORARIA AMOUNTS

Up to \$500 per activity when hosted virtually.

If there are multiple activities in one day, the fee paid for each activity after the 1st will be \$250.00

Up to \$1,000 per activity when hosted in-person.

If there are multiple activities in one day, the fee paid for each session after the 1st will be \$500.00

If the amounts being offered to the guest are within the SOM recommended levels, the department(s) can assume the Dean and the Vice Provost will approve, and as such, they can provide the amount to the guest ahead of approval. An invitation to take part in the activity and honoraria may be extended by the department and is appropriate to communicate prior to approval. **Note: You must stipulate that the anticipated amount to be awarded is \$XXX and can be subject to change upon approval from SOM or Academic Personnel.**

If the department will offer more than the SOM recommended amount, you need exceptional approval, and the amount should not be confirmed with the guest until approval has been received.

PROCEDURES: HONORARIA FOR NON-UC SPEAKERS

1. **Well in advance of the event:** Department prepares a memo on letterhead addressed to the Dean, signed by the Chair which requests an honorarium and explains the following: *Date and details of event, name, title, and professional location of the honorarium recipient, as well as the honorarium amount requested.* Include signature block for Dean to sign:

I approve:

Michael J. Stamos, MD
Dean, UCI School of Medicine

NOTE: Memo must ask for exception if (1) amount paid is over SOM thresholds, and/or (2) the event has already occurred

2. **Attach a flyer, advertisement or marketing materials for the event**
3. **.PDF bundle all of the above items with the [Routing Slip](#) as a cover page and route to somadministration@uci.edu**
4. **Once the Dean has signed the memo, Rachel Pearlman will return the signed memo to the department.** The department should follow established SOM Finance procedures to proceed with payment to the guest.

PROCEDURES: HONORARIA FOR UC APPOINTEES

1. **Well in advance of the event:** The Host Campus prepares a memo on letterhead addressed to the Dean, signed by the Chair which requests an honorarium explains the following: *Date and details of event, name, title, and professional location of the honorarium recipient as well as the honorarium amount requested.* Include signature block for Dean to sign:

I approve:

Michael J. Stamos, MD
Dean, UCI School of Medicine

NOTE: Memo must ask for exception if (1) amount paid is over SOM thresholds, and/or (2) the event has already occurred

2. **Prepare the UPAY 560/644 form.** This form must be filled out completely and accurately. Contact other UC location for information (Dept. Acad. Affairs analyst or Campus AP Analyst). **NO NEED TO OBTAIN SIGNATURES FROM THE OTHER CAMPUS.**
3. **Attach a flyer, advertisement or marketing materials for the event**
4. **.PDF bundle all of the above items with the Routing Slip as a cover page and route to somadministration@uci.edu;**
5. **The Dean's Analyst reviews and works with the department analyst to make any corrections, and then route all items to the Associate Dean and then the Vice Provost.** The Vice Provost's office works with the other campus to obtain review/signature. Once the Honoraria is approved and signed by the Vice Provost, the Dean's Analyst will route the signed form back to the department, and the department should follow established SOM Finance procedures to proceed with payment.

NOTE: Honoraria for faculty at another UC campus requires that all forms are routed to the other UC campus for their review/signature prior to the final authority signature. This can take a significant amount of time; please plan accordingly. You may check in with your Dean's analyst if you do not have a signature within 2 weeks of the submission date.

PROCEDURES: AWARD OR PRIZE

1. **NO MEMO REQUIRED**
2. **The Host department prepares the AP-70 (UCI appointee) or UPAY 560/644 (other UC appointee) forms and attach them to the supporting documents.** The forms must be filled out completely and accurately. NO NEED TO OBTAIN SIGNATURES FROM THE OTHER CAMPUS.
2. **The Host department locates an Email, announcement or other materials which support the Award/Prize**
3. **.PDF bundle all of the above items with the [Routing Slip](#) as a cover page and route to somadministration@uci.edu; Rachel Pearlman will route to Dean's Analyst**
4. **The Dean's Analyst reviews and works with department to make any corrections, and then routes all items to the Associate Dean and then the Vice Provost.** Once the Award/Prize is approved and the UPAY or AP form is signed, the Dean's Analyst will route everything back to the department, and the department should follow established SOM Finance procedures to proceed with payment.

NOTE: Awards/Prizes for faculty at another UC campus requires that all forms are routed to the other UC campus for their review/signature prior to the final authority signature. This takes a significant amount of time; you may check in with your Dean's analyst if you do not have a signature within 2 weeks of the submission date.

JOB TITLE
JOB DESCRIPTION
EARN CODE

USE THIS INFORMATION TO COMPLETE SECTION 3 OF THE UPAY 560/644 FORM AND
JOB CODE/DESCRIPTION ON THE AP-70

Activity	Job Title	Job Description	Earn Code
Honoraria: Lecturers and Seminar	001650	Lecturer-Misc/Part-Time	HON
Honoraria: Creative Works, University sponsored panels/conferences	003999	Misc. Academic Activity	HON
Faculty Consultant	003700	Faculty Consultant	ACF
Award/Prize	003999	Miscellaneous	AAP*

RESOURCES: [APP 9-10](#), [APP 9-11](#)

Home > Policies & Procedures > Academic Personnel Procedures > APP 9-10: Additional Compensation – One-Time Payments

APP 9-10: Additional Compensation – One-Time Payments

Only in specific circumstances is additional compensation allowed for academic appointees, these circumstances are outlined in the salary administration section of the *Academic Personnel Manual*. A one-time payment is additional compensation provided to an academic appointee for occasional service or activities that fall outside of the appointee's normal responsibilities. These payments are governed by specific policies and not all additional services/activities are eligible for additional compensation.

Eligible one-time payments are listed below, activities or services that do not fall under the outlined categories will require exceptional approval.

All one-time payment requests must be approved by the Office of Academic Personnel prior to the activity or service and before payments can be processed and paid to the academic appointee.

Open All | Close All

▼ A. Honoraria

1. Policy and Eligible Titles

An honorarium is a payment by the University to an academic appointee for lectures and similar services that fall outside of the appointee's normal academic responsibilities to the University (*APM 666*).

All requests for payment of honoraria to University academic appointees should be forwarded to the Vice Provost through the Office of Academic Personnel.

Vice Chancellors, Academic Deans, and the Director, UCI Medical Center are delegated the authority to approve payment of honoraria of up to \$2,500 to individuals who are not University employees. This authority may not be redelegated further.

All academic appointees are eligible to receive an honorarium payment.

2. Service Activities

A UC academic appointee may receive honoraria for one of the following activities:

- A special lecture or a short series of such lectures at a campus other than the faculty member's home campus.
- A campus sponsored program review for a campus other than the faculty member's home campus.
- A concert or other creative work on any UC campus including where the appointee serves.
- University-sponsored conferences and panels when these activities occur on any UC campus including where the appointee serves.

Home > Policies & Procedures > Academic Personnel Procedures > APP 9-11: Processing One-Time Payments

APP 9-11: Processing One-Time Payments

All one-time payments must be approved by the Office of Academic Personnel **prior** to the activity/service taking place and **before** these payments are offered to the academic appointee.

For all intercampus one-time payments, the host campus must notify the home campus of the activity in advance of the activity being performed. The home campus must confirm that the academic appointee is eligible to receive the payment.

Job Codes and Earn Codes for UCPath Entry:

- Lect-Miscellaneous/Part Time: 001650 / HON for Honorarium
- Faculty Consultant: 003700 / ACF for Additional Compensation – Consulting
- Award/Prize: 003999 / AAP for Academic Award or Prize
- Misc. Academic Activity: 003999 / HON for Regular Pay

Home/Host	Form to Use	Process
Home: UCI Host: UCI	UCI-AP-70	Host department prepares and completes AP-70 form. Host department sends AP-70 form to the Office of Academic Personnel (acadpers@uci.edu). Office of Academic Personnel will review and sends form back to host department. Host department processes transaction in UCPath.
Home: Other UC Host: UCI	US60/644 Form	UCI department completes the US60/644 Form for inter-location one-time payment form. UCI department sends US60/644 Form to the UCI Office of Academic Personnel (acadpers@uci.edu). UCI Office of Academic Personnel will review form; if approved, will send to home campus. Home campus completes their section/approval and sends form back to the UCI Office of Academic Personnel. UCI Office of Academic Personnel will send completed form to UCI department. UCI department will enter transaction in UCPath.
Home: UCI Host: Other UC	US60/644 Form	Host campus completes the US60/644 Form for inter-location one-time payment form. Host campus sends the form to UCI's Office of Academic Personnel for review and approval. UCI Academic Personnel will send completed form to host campus. Host campus will enter transaction in UCPath.

LET'S REVIEW:

AP-70

Make sure this is correct; the AP-70 will auto-populate the 'Job Code and Description' and 'Earn Code' depending on your selection here

Notice the Job Code and Earn Code: use your Resources! (APP 9-11)

UCI Office of Academic Personnel

USE FOR UCI APPOINTEES

Form must be filled out with complete and accurate information
Host must reach out to the Home to obtain accurate information

ONE-TIME PAYMENT AUTHORIZATION FORM (UCI-AP-70)

Academic Appointees - Irvine Campus


HOME DEPARTMENT INFORMATION				
EMPLOYEE NAME: Lisa Gibbs	EMPLOYEE ID: 10284159	JOB CODE: 1734	JOB CODE DESCRIPTION (TITLE): HS CLIN PROF-HCOMP	STEP: V
DEPARTMENT/UNIT: Family Medicine; Div. of Geriatric Medicine	DEPT CODE: IR6095	APPOINTMENT PERCENT: 100	The salary rate should be (X) rate \$271,000	
SCHOOL NAME: SCHOOL OF MEDICINE	BASIS/PAID OVER: 11/12	BEGIN DATE: 7/17/2002	END DATE: 6/30/2023	
HOME DEPARTMENT CONTACT NAME AND EMAIL/PHONE NUMBER: Cam Azarakhsh cazarakh@hs.uci.edu/714-456-3730				
HOST DEPARTMENT INFORMATION				
SCHOOL NAME: SCHOOL OF MEDICINE	DEPARTMENT/UNIT: SOM - Office of Research	DEPT CODE: IR5021		
SELECT THE APPROPRIATE ONE-TIME PAYMENT CATEGORY: AWARDS OR PRIZES	JOB CODE AND DESCRIPTION: 003999 - MISCELLANEOUS	EARN CODE: AAP		
EVENT/SERVICE START DATE: April 13, 2022	EVENT/SERVICE END DATE: April 13, 2022	ONE-TIME PAYMENT AMOUNT: 1000.00		
ACCOUNT NUMBER/KFS NUMBER TO BE CHARGED: PR58660		Please Note: State funds cannot be used for one-time payments.		
HOST DEPARTMENT CONTACT NAME AND EMAIL/PHONE NUMBER: Emily Dawidoff edawidof@hs.uci.edu/949-824-1309				

Refer to any limits set by SOM Finance

LET'S REVIEW:

AP-70

Describe the Award in detail, and how the Award was decided. Note: cannot be ad-hoc; must be an established award and proof must accompany this form

EVENT/SERVICE DESCRIPTION		
Please describe the competitive process of the award/prize being presented.		
On February 17, 2022, a call for nominations was issued to all School of Medicine faculty, staff, students, trainees, for the 2022 School of Medicine Annual Research Awards. This is the second annual call for these awards which are given in six categories. It was announced that awardees are acknowledged with an individual plaque, their name added to a perpetual plaque, and a monetary prize. After a competitive review by committee and approved by Dean Stamos, winners of the awards were announced on April 13, 2022. Lisa Gibbs, MD, was awarded the SOM Outstanding Mid-Career Faculty Research Award for her consistent excellence in Clinical Research. The recognition comes with a monetary prize of \$1,000.		
APPROVALS		
	5/31/2022	Patrick Rodela, SOM-Dean's Office, Finance Operations
Host Department Fund Source Authorization Signature	Date	Printed Name
Host Dean/Vice Chancellor's Signature	Date	Kyoki Yokomori, PhD Printed Name
Vice Provost's Signature	Date	Diane K. O'Dowd Printed Name
Send Original to Host Department. Copies of the signed form should be sent to: Home Department and Dean's Office.		

5/21

UCI-AP-70

Do not send forward without this signature, date, and name

LET'S REVIEW:

AP-70

EVIDENCE OF
THE AWARD

Evidence must come forward along with the AP-70 form

Can be an Email, letter, announcement, or other type of evidence which describes the award and/or the announces the winner of the award (or both)

From: Geoff Abbott, PhD, Vice Dean for Basic Research, and Daniela Bota, MD, PhD, Vice Dean for Clinical Research, UCI School of Medicine
To: tkennedi@uci.edu
Subject: 2021-2022 School of Medicine Annual Research Awards
Date: Monday, September 27, 2021 5:07:02 PM

[View in Browser](#)

2021-2022 School of Medicine Annual Research Awards

The School of Medicine Office of Research is pleased to announce the launch of our annual research awards to recognize research excellence and outstanding academic achievement in the UCI School of Medicine. Each awardee will receive a monetary award and an individual plaque of recognition, and their name will be added to an enduring plaque on display in the School of Medicine.

1. **SOM Outstanding Graduate Student Research Award:** Aimed at graduate students (one clinical/translational and one basic science) who show outstanding scientific promise in biomedical research (two awardees will receive \$500 each)
2. **SOM Outstanding Fellow/Resident Research Award:** Aimed at residents, clinical fellows and postdoctoral fellows (one clinical and one basic science) who show outstanding scientific promise in biomedical research (two awardees will receive \$500 each)
3. **SOM Outstanding Career Scientist Research Award:** Recognizing the scientific impact of career scientists (non-faculty; includes Research Scientist and Research Specialist series; one awardee will receive \$500 award)
4. **SOM Outstanding Early-Career Faculty Research Award:** Recognizing the scientific impact and novel contribution of early-career faculty (includes assistant professors in the HS Clinical, Clinical X, In-Residence, In-Line and Adjunct series; two awardees: one focused on basic research and one focused on clinical research; each will receive \$1000)

USE FOR APPOINTEES FROM OTHER UC's

Form must be filled out with complete and accurate information
Host must reach out to the Home to obtain accurate information

LET'S REVIEW:
UPAY 560/644

Use TNS rate (X+X'+Y) here and indicate accurate pay schedule (Monthly or Bi-Weekly)

The reasoning here must be complete and must match what is on the Dean's Memo (e.g. date of event, description, purpose of the event, etc

Event Date, Name of Symposium, Title/Name of Talk (if any), OR brief description of the Talk.

MULTI-LOCATION APPOINTMENT/INTERLOCATION ONE-TIME PAYMENT FORM ¹

Select: MLA (ongoing; complete sections 1, 2, 4 & 5) OTP (single payment; complete sections 1, 3, 4 & 5)

Section 1: HOME LOCATION INFORMATION (complete for both MLA and OTP)

Home Location	UCLA	Job Code and Title: use <u>full title</u> including '-HCOMP' (if applicable)	Home Department(s)	Medicine
Employee Name	Jenny Sauk		Employee ID	10053459
Job Title(s)	HS. Associate Professor	Job Code(s)	1733	Step 2
Salary	\$ 300,000.00	<input checked="" type="checkbox"/> Annually <input type="checkbox"/> Hourly	Total Job FTE	1.00
Primary Pay Schedule	<input checked="" type="checkbox"/> MO <input type="checkbox"/> BW	* FLSA Status: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	Frequency	<input type="checkbox"/> UC_9M <input type="checkbox"/> UC_10 <input type="checkbox"/> UC912 <input checked="" type="checkbox"/> UC_FY

* Note: For MLAs, pay schedule and FLSA status must match across appointments. Please consult with your AP Office or Staff HR Office, as appropriate.

Section 2: MLA HOST LOCATION INFORMATION (complete only for an ongoing Multi-Location Appointment)

Host Location		Host Department	
Job Title		Job Code	
Salary	<input type="checkbox"/> Annually <input type="checkbox"/> Hourly	Job FTE	
Primary Pay Schedule	<input type="checkbox"/> MO <input type="checkbox"/> BW		
Job Title/Code, Earn Code, Service Dates, Fund Source, etc. must be accurate; use your Resources APP 9-11		Fund Source (COA or FAU)	

SOM faculty are paid on a Fiscal Year (FY) schedule; Faculty from other schools at other UC's may be on a different schedule (e.g. 9/12)

Should be: Lecturer-Misc/**Part Time**

Section 3: OTP HOST LOCATION INFORMATION (complete only for an Interlocation One-Time Payment)

Host Location	UCI	Host Department	Medicine
Job Code & Job Title	001650 - Lecturer-Misc	One-Time Payment Amount	\$ 1,000.00
Earn Code	HON	Fund Source (COA or FAU)	SS11016
Service Dates	2/24/24 to 2/24/24		

Section 4: REASON FOR APPOINTMENT (complete for both MLA and OTP)

Speaker in the CME activity, 16th Annual DHI Symposium, Feb 23-25, 2024. Dr. Sauk will speak on February 24, 2024 for a lecture and Q&A.

LET'S REVIEW: UPAY 560/644

Since the Host campus initiates the form, the Host Campus will complete the 'Host Location' area; make sure all boxes are completed with accurate information, signatures, and dates.
Please do not contact the Home Location for signatures

Section 4: APPOINTMENT (complete for both MLA and OTP)

Dr. Alexander Nguyen will speak on February 24, 2024 for a lecture and Q&A.

Section 5: APPROVALS (complete for both MLA and OTP)

Host Location			
Location Contact Name: Amal Khalil Phone/ Email: akhalil@hs.uci.edu	Department Fund Source Authorization (Name) Alexander Nguyen	DocuSigned by: Alexander Nguyen E08E38483264AF Authorization (Signature)	Date 2/6/2024
	Dean's Office/Academic Personnel or Staff HR (Name) NJS signed	Dean's Office/Academic Personnel or Staff HR (Signature)	Date
Home Location			
Location Contact Name: Thuy An Lu Phone/ Email: 310-339-6195/ tnl@mednet.ucla.edu	Dean's Office/Academic Personnel or Staff HR (Name) Cynthia Guzman / CynthiaGuzman@mednet.ucla.edu	Dean's Office/Academic Personnel or Staff HR (Signature)	Date

RETN ACCOUNTING: 5 YEARS AFTER SEPARATION, EXCEPT IN CASES OF DISABILITY, RETIREMENT, OR DISCIPLINARY ACTION. IN SUCH CASE RETAIN UNTIL AGE 70. OTHER COPIES: 0-5 YEARS AFTER SEPARATION.
1. Replaces UPAY 560-T and UPAY 644C-T (revised 01/18/2023)
CC: EMPLOYEE'S HOME DEPARTMENT

The 'Dean's Office/Academic Personnel or Staff HR (Name) boxes are completed by the Dean's Office or AP Office at either campus; department does not complete these areas

LET'S REVIEW: UPAY 560/644

DocuSign Envelope ID: 229EC172-FB06-4630-BE8B-68D8D6BE8708

MULTI-LOCATION APPOINTMENT/INTERLOCATION

Home Location/Department: Location/Department where currently employed.
Host Location: Location/Department where activity is being performed

FOR BOTH MLA AND OTP, COMPLETE SECTION 1:

Home Location Information: (to be obtained from Home Department/Campus)

Employee Name: Name as entered in Person Org Summary.

Employee ID#: UCPath Employee ID number

Job Code: Job code(s) for home campus's appointment(s)

Home Location Job Title: Employee's title(s) at Home Campus

Step: Step of home appointment (if applicable)

Annual or Hourly Rate: Enter the full-time equivalent salary of home department's primary appointment

Total Job FTE: If employee has multiple jobs, add up all the FTEs of each job and provide the total combined FTE

Primary Pay Schedule: Check MO or BW

FLSA Status: Check Exempt or Non-Exempt. NOTE: if there are questions/conflicts about FLSA status for employees with concurrent jobs, please consult with your **AP Office** or **Staff HR Office**, as appropriate.

Frequency: Check appropriate box (**UC_9M, UC_10, UC912, or UCFY**)

FOR MLA (SELECT IF PAYING ON MORE THAN ONE PAYMENT) SELECT MLA CHECK BOX AND COMPLETE SECTION 2:

Host Location Information: (to be provided by Host Department)

Host Location Temporary or Multi-location appointment title: Enter a valid UCPath title which relates to the job at the host campus

Job Code: Enter a valid UCPath job code which relates to the appointment at the host campus

Step: Enter correct Step (if applicable) for host campus appointment

Annual or Hourly Rate: Enter the full-time equivalent salary of host department appointment

(If paid hourly, time sheets must be submitted in order for pay to be issued)

Job FTE%: Indicate Job percentage of appointment. NOTE: if the combined total FTE for home and host campus appointments exceeds 100%, please coordinate with appropriate home campus contacts to adjust the FTE, as needed.

Primary Pay Schedule: Check MO or BW

Frequency: Check appropriate box (**UC_9M, UC_10, UC912, or UCFY**)

Earn Code: Enter valid UCPath earn code

Pay Period Dates: List complete dates of appointment. Must contain both start and end date

Host Location Fund Source to be Charged: Enter full accounting unit, must be an appropriate FAU/COA for Payroll Expense

FOR OTP (SELECT IF PAYING A ONE-TIME PAYMENT) SELECT OTP CHECK BOX AND COMPLETE SECTION 3:

Host Location Information: (to be provided by Host Department)

Host Location Temporary or Multi-location appointment title: Enter a valid UCPath title which relates to the job at the host campus

Job Code: Enter a valid UCPath job code which relates to the appointment at the host campus

Event Service Dates: Enter start and end date of service for the one-time payment

Payment Amount: Enter amount for one-time payment

Earn Code: Enter valid UCPath earn code

Host Location Fund Source to be Charged: Enter full accounting unit, must be an appropriate FAU/COA for Payroll Expense

FOR BOTH MLA AND OTP, COMPLETE SECTION 4 AND OBTAIN HOME AND HOST LOCATION APPROVALS.

Routing Instructions

1. Host location selects check box for MLA and/or OTP, fills out employee information, and very basic home job information using Person Org Summary that host location has access to. Host location may coordinate with home location to fill out additional details for the Home Location section.
2. Host location fills out Host job information, obtains appropriate approvals, and sends form to Home location's **AP Office** or **Staff HR Office**, as appropriate.
3. Home location reviews form, adds approvals to the form and returns to Host location, cc'ing Home Department.
4. Host location initiates a Template Based Hire for concurrent hire, attaching approved form.

PAGE 2 HAS HELPFUL INFORMATION, BUT PLEASE KEEP IN MIND WE HAVE OUR OWN CAMPUS AND SCHOOL PROCEDURES

Letter is on letterhead, dated, signed by Chair and includes a line for Dean Stamos' signature

The letter is descriptive and includes information pertinent to the request: Name of Faculty receiving Honoraria, Event dates and details, amount requested to pay, justification for payment, and dated in advance of the event

If you must request payment of Honoraria *after* the event, then the letter must request an *exception*

LET'S REVIEW: MEMO TO DEAN STAMOS

UC IRVINE HEALTH

School of Medicine
University of California, Irvine
Department of Medicine

Alpesh N. Amin, MD, MBA, MACP,
SFHM, FACC, FHSA, FRCP (Lond)
Thomas & Mary Cesario Endowed Chairman
101 The City Drive South
City Tower, Ste 400 – ZOT 4076
Orange, CA 92868-3217
714.456.3224 fax 714.456.3871

February 8, 2024

Dean Michael J. Stamos, MD
School of Medicine
Irvine Hall, Ste. 240

RE: Request for Approval to Offer Honorarium for 16th Annual Digestive Health Symposium

Dear Dean Stamos,

The Department of Medicine would like to request approval to offer an honorarium to Jennifer Kolb, MD, who has been invited by the Division of Gastroenterology and Hepatology to present at their 16th Annual Digestive Health Symposium, scheduled to take place February 23-25, 2024. This conference is a CME-accredited event, which attracted more than 800 attendees last year.

Dr. Kolb received her undergraduate degree from the University of Pennsylvania and her medical degree from the Icahn School of Medicine at Mount Sinai where she graduated with distinction in research and was a member of the Gold Humanism Honor Society. She also completed her internal medicine residency at Mount Sinai. She completed her gastroenterology and hepatology fellowship at the University of Colorado where she was on the NIH T32 research training grant and earned a master's degree in clinical science. She completed an advanced endoscopy fellowship at UC Irvine prior to joining UCLA. Dr. Kolb is currently an assistant professor of medicine at the David Geffen School of Medicine at UCLA and a staff gastroenterologist at the West Los Angeles VA Medical Center.

Her clinical work encompasses a broad set of interventional endoscopy procedures including EUS, ERCP, advanced resection, luminal stenting, endobariatrics and third space endoscopy. She has a particular interest in interventions for foregut disease including esophageal motility disorders, Barrett's esophagus, GERD, and obesity. Dr. Kolb's main research interest is Barrett's esophagus and esophageal cancer. Her work focuses on strategies for early detection through novel testing modalities and refining screening algorithms. She is also interested in improving endoscopy quality in Barrett's esophagus related to lesion identification and resection techniques to decrease the rates of missed cancers.

Dr. Kolb will give a special presentation titled "Is EUS Guided Biliary Access Better Than ERCP?" and participate in a panel Q&A session. To adequately recognize their distinguished reputation and topic content, as well as the enrichment their presentation will provide to our educational program, we are requesting approval to offer them a \$3000 honorarium.

A draft flyer and agenda for the event has been attached. Please let us know if you have any further questions. Thank you for your consideration of this request.

Sincerely,



Alpesh Amin, MD, MBA, MACP, SFHM, FACC, FHSA, FRCP (Lond)
Thomas and Mary Cesario Endowed Chair, Department of Medicine
Executive Director, Hospitalist Program
Professor of Medicine, Business, Public Health,
Nursing Science & Biomedical Engineering

I Approve:



Michael J. Stamos, MD, FACS, FASCRS
Dean, UCI School of Medicine

Letter is on letterhead, dated, signed by Chair and includes a line for Dean Stamos' signature

The letter does not have to be long, however it must include the required elements: Name of Faculty receiving Honoraria, Event dates and details, amount requested to pay, justification for payment, and dated in advance of the event

UC Irvine School of Medicine
Office of Continuing Medical Education
5141 California Ave., Suite 200 B
Irvine, California 92617

07/31/2023

Michael J. Stamos, MD
Dean, School of Medicine
University of California, Irvine

RE: Honoraria Request

Dear Dr. Stamos:

The Office of Medical Education, in the School of Medicine, requests approval to pay an honorarium to Mark Henderson, MD, in the amount of \$300 per lecture with a maximum of \$500 per day for participating in the 2023 TNT PCP Fellows & CAP Track August Conference on 08/11/23-08/12/23. Faculty will be providing a lecture called *How to Train Others* as well as speaking on the *Stump the Experts* panel. This event will take place at the Sheraton San Diego.

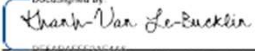
Lecture Schedule:

Faculty Name	Academic Institution	Aug. 11, 2023	Aug. 12, 2023	Conference Topics
Mark Henderson, MD	UC Davis	\$300	\$300	Fri. 8/11 at 12:45 PM – How to Train Others Sat. 8/12 at 1:15 PM – Stump the Experts Panel

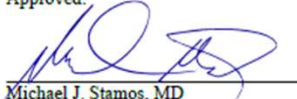
The honoraria will be paid by the Office of Medical Education, in the School of Medicine, using State funds.

Your consideration of this request is most appreciated.

Sincerely,

DocuSigned by:

Khanh-Van Le-Bucklin, MD, MEd
Vice Dean, Medical Education
University of California, Irvine School of Medicine

Approved:


Michael J. Stamos, MD
Dean, School of Medicine
University of California, Irvine

LET'S REVIEW:

MEMO TO
DEAN STAMOS

LET'S REVIEW: EXCEPTIONAL MEMO

Letter is on letterhead, dated, signed by Chair and includes a line for Dean Stamos' signature

The letter is descriptive and includes relevant information pertinent to the request: Name of Faculty receiving Honoraria, Event dates and details, amount requested to pay, etc.

Includes the word 'exception', and the reasoning/justification for the exception

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SANTA BARBARA • SANTA CRUZ

Department of Medicine
Division of Gastroenterology & Hepatology

University of California, Irvine
UCI Medical Center
101 The City Drive South
City Tower, Suite 400
Orange, CA 92868

January 9, 2023

Michael J. Stamos, MD, FACS, FASCRS
Dean, UC Irvine School of Medicine

RE: Exceptional After-the-Fact Approval for Honorarium

I am requesting exceptional, after-the-fact approval to offer an honorarium to David C. Kunkel, MD, UCSD, who presented as an external speaker at the 14th Annual Gastroenterology and Hepatology Symposium, which took place in hybrid virtual/in-person format April 20-22, 2022. The conference was a CME-accredited event which attracted more than 1000 attendees.

Dr. Kunkel presented on the topic "Gastroparesis and the pylorus: concepts, controversies, and challenges" and served as a panel member for a Q&A session. Like the other invited speakers, Dr. Kunkel is an expert and well-respected authority in his field. As we requested and received exceptional approval to offer each of the other external speakers an honorarium of \$500, we are making the same request in regards to Dr. Kunkel.

We understand that this request is being made after-the-fact by quite some time. Unfortunately, Dr. Kunkel was not able to accept our invitation until just prior to the event, and due to administrative oversight, as well as communication delays between the Division and Dr. Kunkel, the necessary paperwork required for interlocation honoraria was not completed in a timely manner. The Department has reiterated the need for timely submission of honorarium requests to the Division, and we will work to ensure that these requirements are followed moving forward.

It is our hope that given the benefit this symposium offers both to our faculty and the community at large, you will grant this exceptional after-the-fact approval.

The agenda for the symposium has been attached. If you have any further questions, or require any further details, please let us know. Thank you for your consideration of this request.

Sincerely,

Michael J. Stamos, MD, FACS, FASCRS
UCI Digestive Health Institute
H.H. Chao Comprehensive Digestive Disease Center
Division of Gastroenterology & Hepatology

Michael J. Stamos, MD, MBA, MACP, SFHM, FACC, FHSA, FRCP (Lond)
Sario Endowed Chairman of Medicine
Line, Business, Public Health, Nursing
ical Engineering
Director, Hospitalist Program

Approved:

Michael J. Stamos, MD, FACS, FASCRS
Dean, UC Irvine School of Medicine

LET'S REVIEW: EVIDENCE OF THE EVENT

Jobe, Danelle

From: Kenneth J. Chang, MD, Executive Director, UCI Health Digestive Health Institute
<hsmarcom@uci.edu>
Sent: Tuesday, January 23, 2024 5:02 PM
To: Jobe, Danelle
Subject: 2024 Digestive Health Symposium is one month away

**This is evidence that the event will take place
(event flyer or advertisement)**

Host must attach this document to the UPAY Form
along with the memo for Dean Stamos



The 2024 Digestive Health Symposium is one month away – have you registered yet?

Don't miss out on this in-person CME event Feb. 23-25, 2024. World-class guest speakers and renowned faculty of the UCI Health Digestive Health Institute will share their specialized digestive disease expertise and leading-edge procedures using advanced technology and techniques.

For more information visit www.ucihealth.org/GIsymposium

Dates & Locations:

- Educational symposium: Friday, Feb. 23 and Saturday, Feb. 24, 2024, at The Westin Anaheim Resort



QUESTIONS?

