RESEARCH FOUNDATION CUNY

RESEARCH FOUNDATION
of The City University of
New York
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New York, NY 10036-7207

Summer Salary System User Documentation

The Research Foundation's

SUMMER SALARY SYSTEM

version 3.0

Rev. 5.14.19

CONTENTS

Section 1: Overview

The Summer Salary System allows you to process your summer salary transactions electronically.

This new release is the third version of the Summer Salary System. While redesigning the system, we attempted to reengineer existing processes to make them both intuitive and streamlined. Special attention was given to reduce and simplify data entry.

The system has a number of benefits. The following are a few:

1) **Appointments**: The system streamlines appointment creation by allowing users to enter one appointment per employee and PRSY for the summer. This means fewer transactions to enter and fewer transactions to approve.
2) **Payment Authorization**: This system introduces a new Payment Authorization mechanism, which will replace existing paper certifications that employees must fill out and submit to their campus Payroll Office for payment. Now Payment Authorizations can be entered electronically via the system and, once approved, payment will be made by your campus – no additional action is required outside the system to ensure payment.
3) **New User Interface**: This system sports a new user interface which is not only clean and uncluttered, but also includes tools that give the user greater control over the process and provide a better user experience.
4) **Centralized Access**: The system allows users to access all summer salary transactions electronically. Appointments and Payment Authorizations no longer have to be done at the office – if you can access the Internet, you have access to process and review your transactions. Additionally, users can obtain status updates and other important information regarding their summer salary online, at any time – day or night.
5) **Reduction in Human Error**: This system reduces the need to perform manual checks (e.g. AVL availability) during data entry. This reduces processing errors, and in turn, contributes to faster transaction turnaround times.

Section 2: Users

The following users have access to the **Summer Salary System**. This manual focuses on the first two user groups: **Principle Investigators (P.I.s)** and **Grants Officers (G.O.)**

2.1 P.I.s

P.I.s: These users typically operate from a C.U.N.Y. campus and create summer salary transactions on behalf of a summer salary recipient/employee. In some cases, the P.I. and the summer salary recipient is the same person. These users perform the following actions within the system:

Appointments

- **Create** appointments.
- **Delete** appointments.
- **Edit** appointments that they created.
- **Recall** appointments that were submitted by them.
- **Save** appointments.
- **Submit** appointments to their G.O. for approval.

Payment Authorizations

- **Create** payment authorizations.
- **Delete** payment authorizations.
- **Edit** payment authorizations that they created.
- **Recall** payment authorizations that were submitted by them.
- **Save** payment authorizations.
- **Submit** payment authorizations to their G.O. for approval.

2.2 G.O.s

G.O.s: These users also typically operate from a C.U.N.Y. campus and are responsible for approving and submitting summer salary transactions to the **Research Foundation** (RF) for processing.

Please note that in order for any summer salary transaction (**Appointments** or **Payment Authorizations**) to be processed, they must be approved by a campus GO.

These users may perform the following actions within the system:

Appointments

- **Approve** appointments and submit them to the RF for approval.
- **Create** appointments.
- **Delete** appointments.
- **Edit** appointments that they created or that was submitted to them for approval[1].
- **Recall** appointments that were submitted to the RF.
- **Reject** appointments that were submitted by a P.I.
- **Save** appointments.

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Payment Authorizations

- **Approve** payment authorizations that were either created by them or a P.I. Once a payment authorization is approved by a G.O., it requires no additional approval by the RF.
- **Create** payment authorizations.
- **Save** payment authorizations.
- **Edit** payment authorizations that they created or that were created/submitted to them for approval[2].
- **Reject** payment authorizations that were submitted by a P.I.

2.3 **RF Processors**: These users are **Project Administrators** who work at the RF. They are responsible for reviewing and processing appointments that are sent to the RF by G.O.s.

2.4 **Summer Salary Administrator**: This user is responsible for managing the overall summer salary process, coordinating the actions of users, creating payment authorization reports for CUNY, and answering general questions.

Section 3: Understanding Workflow

[1] G.O.s may edit a summer salary if they have access to the project(s) used to pay that summer salary.
[2] G.O.s may edit a summer salary if they have access to the project(s) used to pay that summer salary.

The workflow used by the Summer Salary System is similar to the workflow used by most **RF E-Systems**. It's important to understand the system's workflow as it will allow you to monitor your transaction and gain a better understanding of the overall process.

3.1 The Appointment Workflow: Figure 1 illustrates how an appointment flows between users and how its status (shown in green) is changed by each user's action.

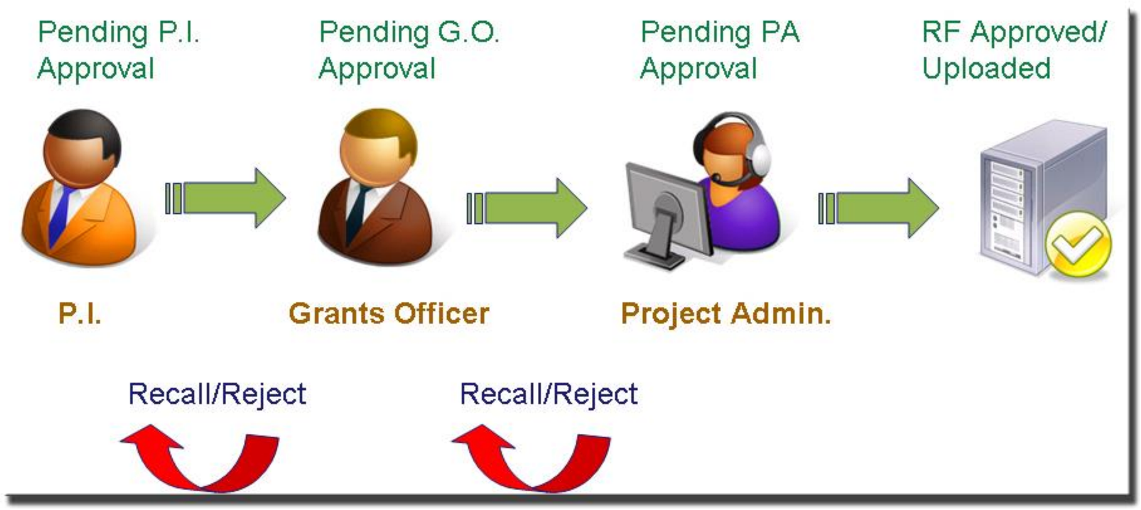


Figure 1: The Appointment Workflow

3.2 **The Payment Authorization Workflow**: Figure 2 illustrates how a payment authorization flows between users and how its status (shown in green) is changed by each user's action.

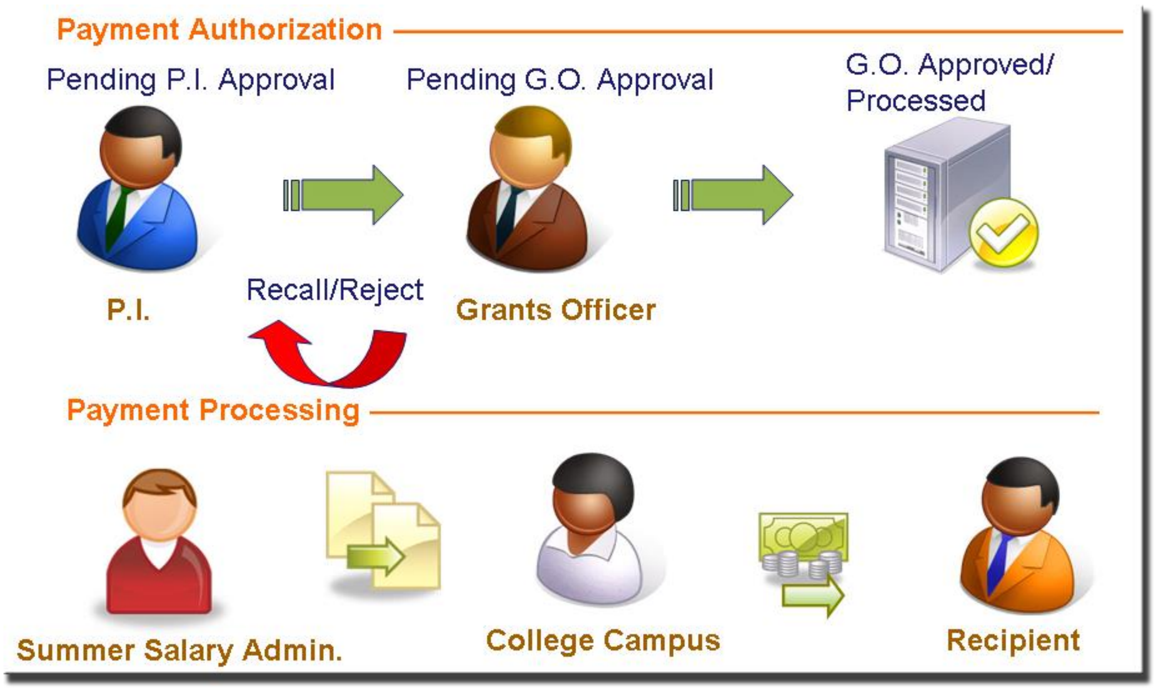


Figure 2: Payment Authorization Workflow

Section 4: Accessing the System

The **Summer Salary System** is available via the **RF Website**. From the **RF Website**, go to the **Electronic Tools** menu and select **Summer Salary** (see figure 3). This will bring you to the system's **Dashboard.**

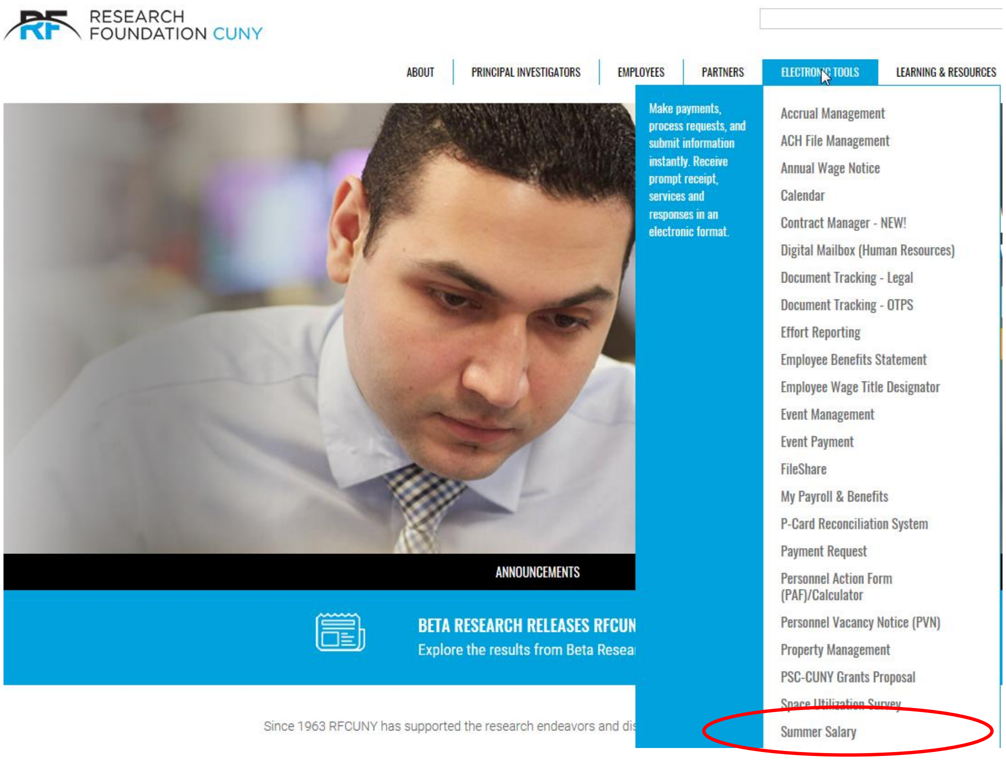


Figure 3: Accessing the system

Note: You must log on to the **RF Website** with either a P.I. or grants officer's **User ID**. You cannot access this system with a **Preparer** or **Employee ID**.

If you do not have a valid **User ID** or if you do not see the **Summer Salary** option listed under your **E-Service** menu please call the **summer salary administrator** at 212-417-8402

The **Summer Salary System** is divided into four modules: **Appointment**, **Payment Authorization**, **View Pending, and Reports**. The remainder of this manual will discuss how to use each of these modules.

Section 5: Appointments

This module allows you to create new appointments and modify existing ones.

5.1 Creating a New Appointment

From your **Dashboard**, click on the **Appointment** icon or click on the **Appointment** tab from the **Main Navigation Bar** (see figure 4).

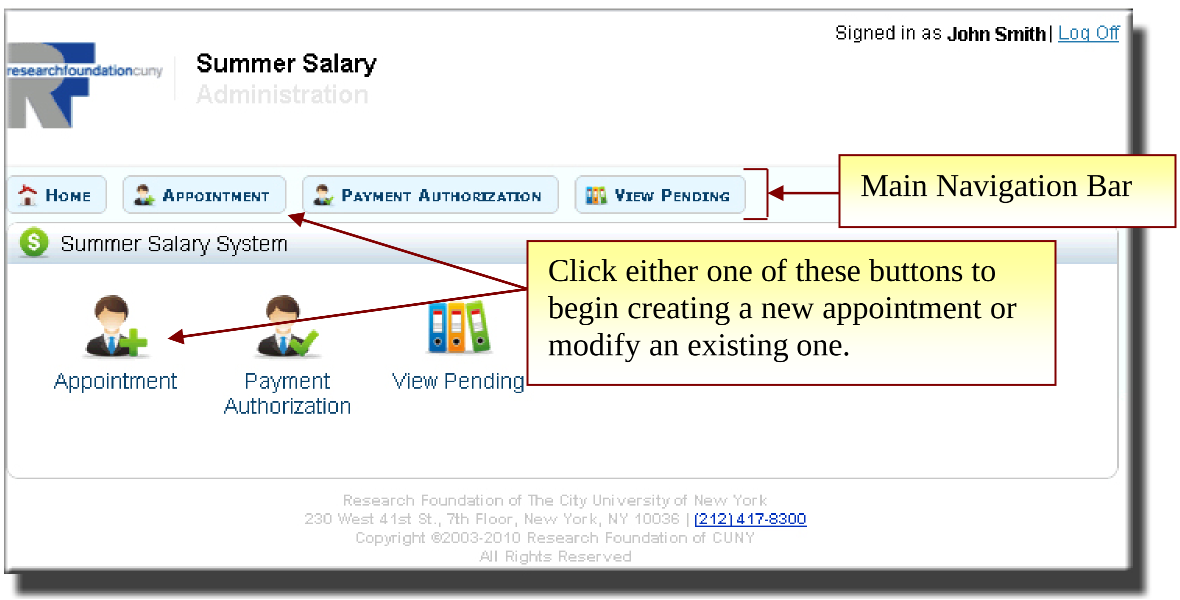


Figure 4: Your system's **Dashboard**

This will bring you to the main **Appointment** page. On this page, verify that the **Year** is correct. The system will always default to the current year. If you wish to process a retroactive appointment (i.e. for a previous year), click **Change Year** and select the appropriate year. Next, click **OK** to complete your selection (see figure 5).

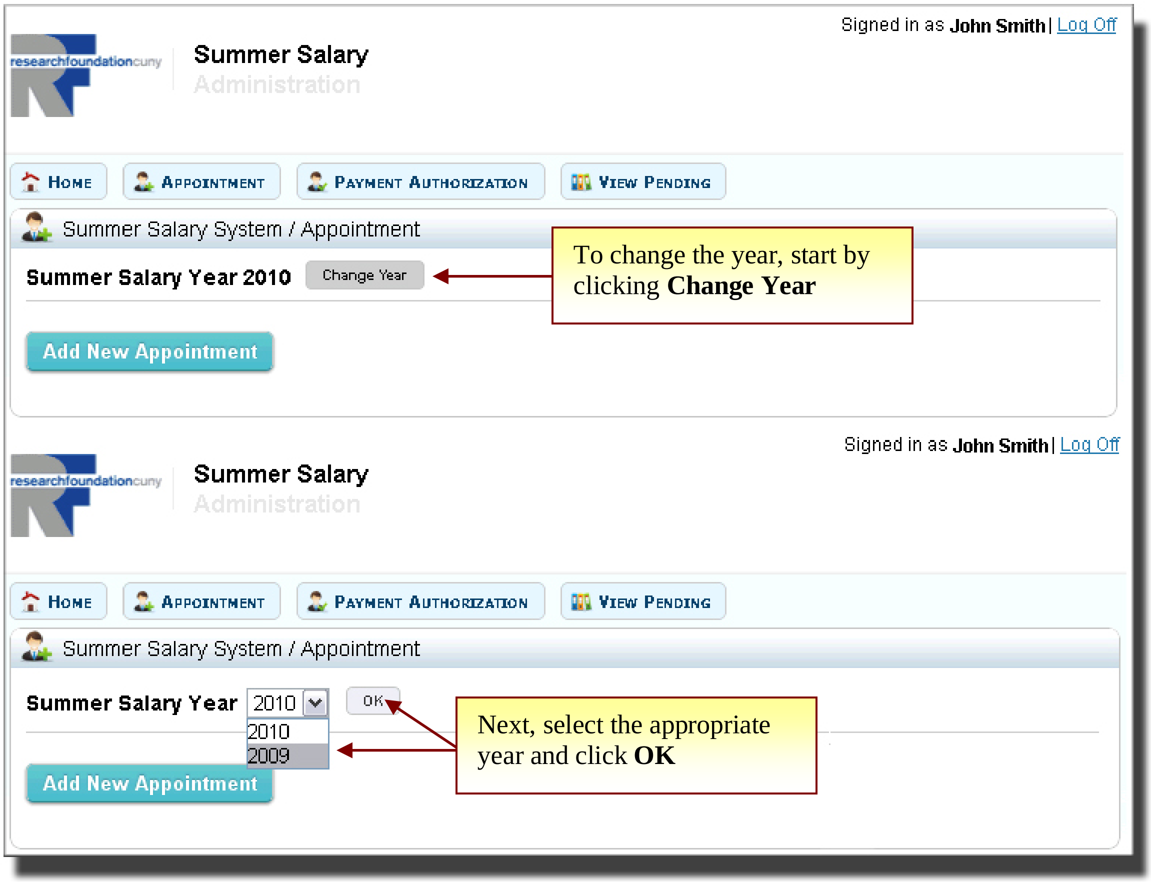


Figure 5: Changing the **Summer Salary Year**

With the correct year selected, click **Add New Appointment** to begin creating a new appointment. This will bring up an **Add New Appointment** screen (see figure 6).

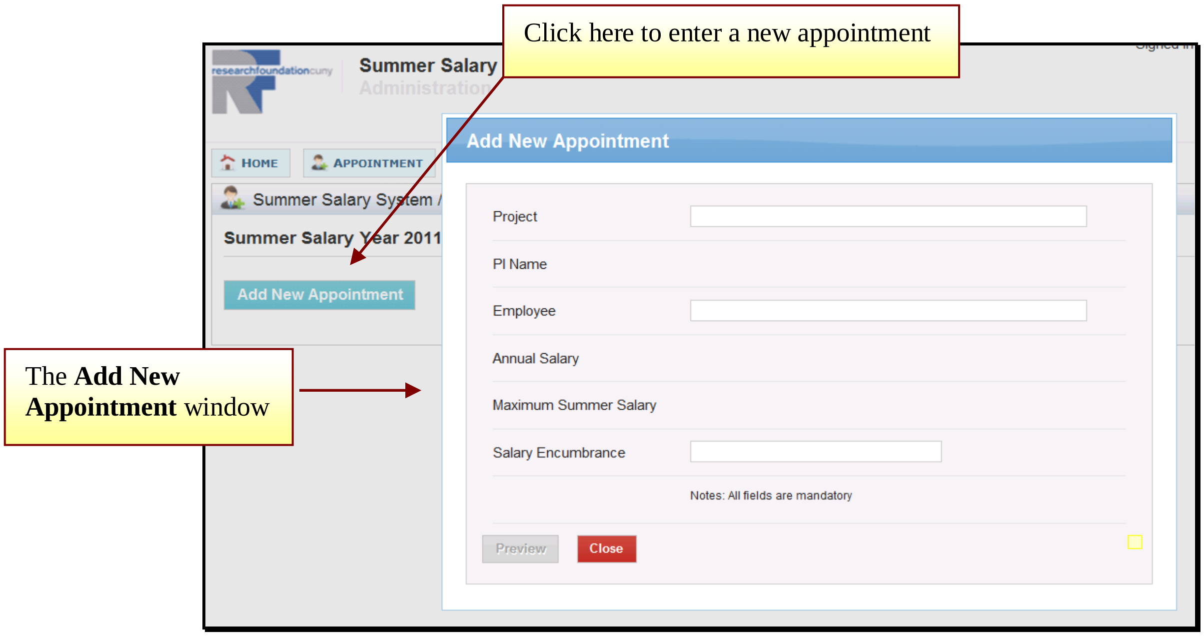


Figure 6: Adding a New Appointment

Enter your **Project Number**, **Employee Name** (*you may search for an employee by entering their last name, first name, or their 8 digit CUNYFirst ID*), and **Encumbrance Amount** in the **Add New Appointment** screen.

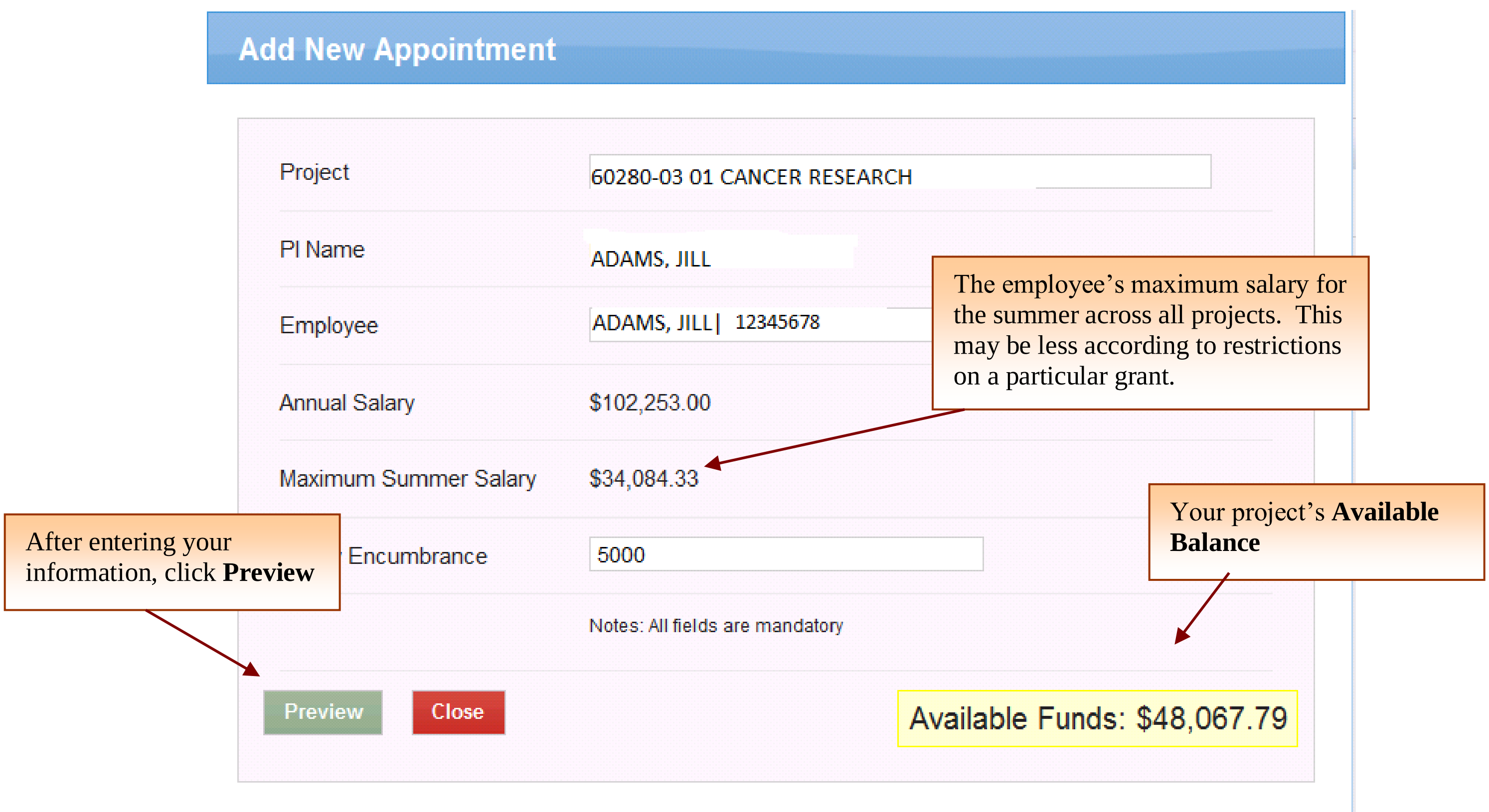


Figure 7: Entering information in the **Add New Appointment** screen

Next, click **Preview** to view data generated by the system (see figure 7).

> ***Note***: In an attempt to make important information readily available, the system will display the available funds for your project at the point of appointment creation. Your project's available balance will appear after you enter your project number and begin entering an employee name (see figure 7)

> ***Note***: The **Project** and **Employee** text-boxes feature an **auto-complete** function that will attempt to display relevant results as you type. For example, you may enter only the first few numbers of your project or the first few letters of the employee's last name, and the system will display results that match your input. This saves you time while entering data.

The system generates the following data based on your input (see figure 8).

1. **Fringe**: This is the fringe amount that will be charged to your appointment. It's a percentage of the salary encumbrance entered.
2. **College**: This is the recipient's **Payroll College**. This college will receive payment authorizations and issue payment to the recipient.
3. **Allowable Salary**: This indicates the percentage of the recipient's allowable salary used by this appointment. This does take into account restrictions, such as the NSF 2 month restriction. You may place your cursor on for an explanation of this in nation.
4. **Total Allowable Salary**: This indicates the cumulative percentage of the recipient's allowable salary used by all appointments for the summer. This number will differ from the **Allowable Salary** figure if the recipient has two or more appointment for the summer. If the recipient has multiple appointments, you can view a breakdown of his/her cumulative salary by placing your cursor over

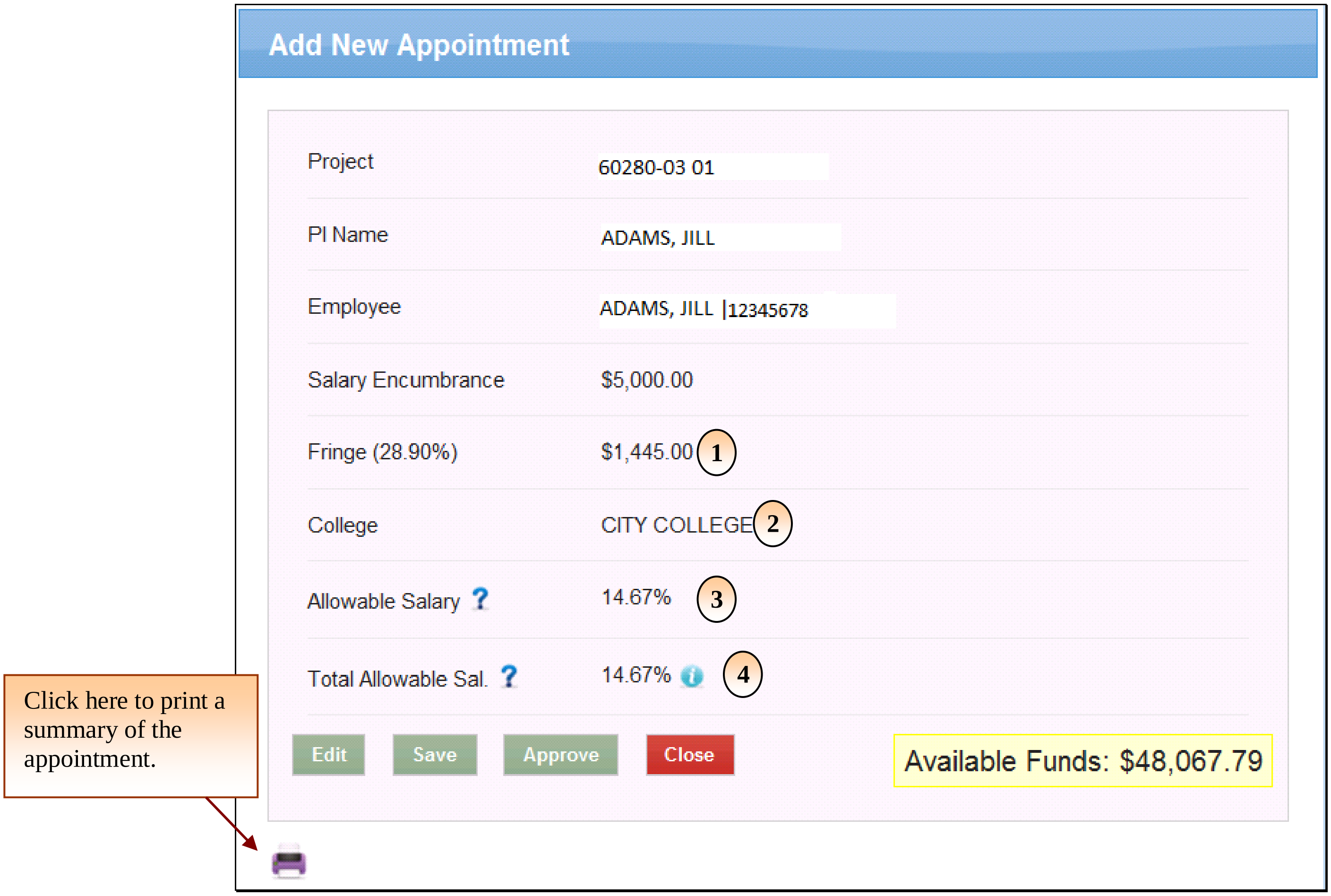


Figure 8: Reviewing System Generated Data

After you have reviewed the information generated by the system, you may choose to:

(i) Edit the information you entered by clicking Edit

(ii) Save the appointment for submission at a later time by clicking Save

(iii) Submit the appointment to the next stage of the workflow by clicking . Approve

If you are a P.I., by choosing this option you will be sending the appointment to your campus grants officer for approval. If you are a grants officer, you will be sending the appointment to the RF for approval. Once your appointment has been approved by the RF, you will receive a notification email.

(iv) Close the window and return to the previous screen by clicking **Close** Please note that you must **Save** or **Submit** your changes before choosing this action or your information will be lost.

5.2 Modifying An Existing Appointment

After your appointment has been approved by the RF, you may choose to modify the appointment's current **Encumbrance**. You may increase the encumbrance up to the maximum allowable salary for the recipient (encumbrances from other appointments will be taken into account), or reduce the encumbrance up to the amount of outstanding **Payment Authorizations** submitted for the appointment. All approved appointments will be displayed below the **Add New Appointment** button (see figure 9).

Note: If your appointment does not appear in the section below the **Add New Appointment** button, it means that it has not been approved by the RF. Please contact your Campus Grants Office or the RF summer salary administrator at 212-417-8402 for more information.

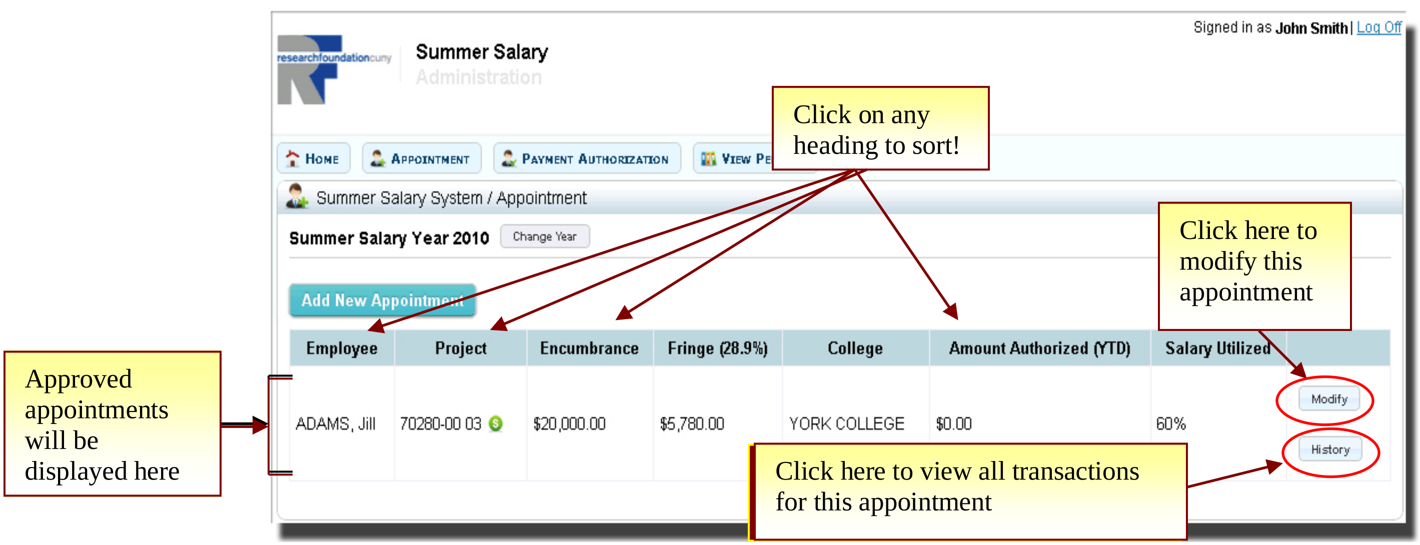


Figure 9: Modifying an existing appointment

Note: To view all actions taken on an appointment (i.e. the original **Add** and subsequent **Modifications**), click on the **History** button beside the appointment. See figure 9.

To begin modifying an appointment, click Modify (see figure 9). This will bring up a **Modify Appointment** window (see figure 10).

To modify the appointment's current **Encumbrance Amount**, you can enter a positive or negative adjustment in the **Encumbrance Adjustment (+/-)** text-box. For example, to add $500 to the existing appointment, enter 500 in the **Encumbrance Adjustment (+/-)** text-box (see figure 10).

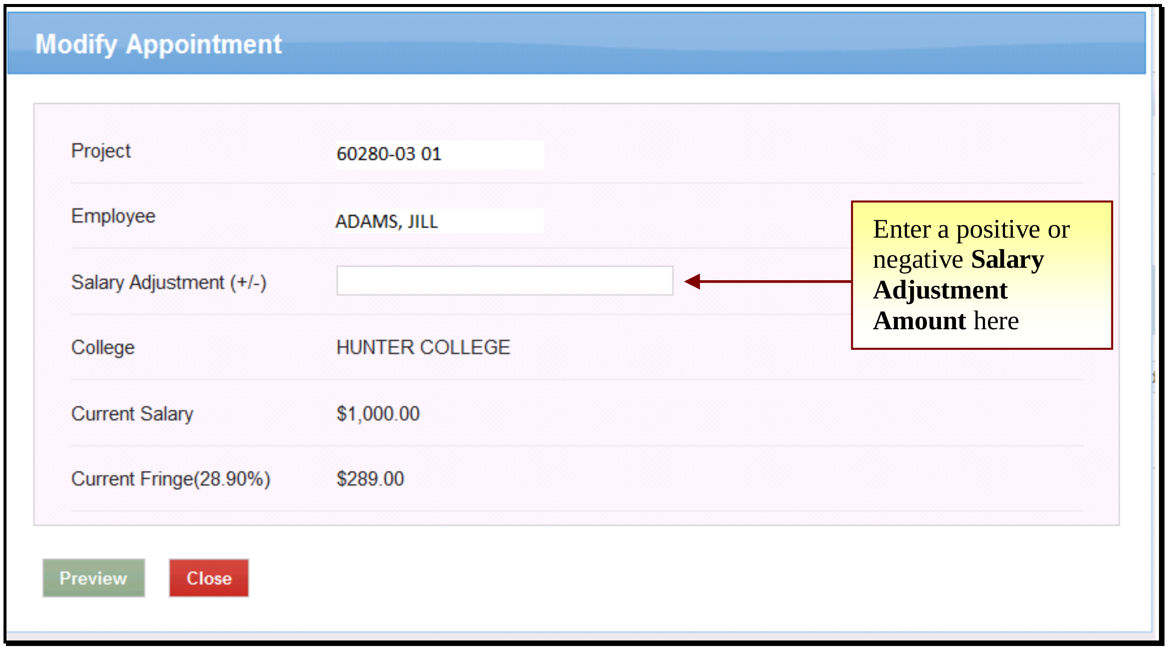


Figure 10: Modifying an Appointment.

Next, click **Preview** to review the information generated by the system. For an explanation of the information generated by the system, please see Figure 8 in the previous section.

After you have reviewed the information, you may choose to:

(v) Edit the information you entered by clicking **Edit**

(vi) Save the appointment for submission at a later time by clicking **Save**

(vii) Submit the appointment to the next stage of the workflow by clicking

If you ar **Approve** choosing this option you will be sending the appointment to your campus grants officer for approval. If you are a grants officer, you will be sending the appointment to the RF for approval. Once your appointment has been approved by the RF, you will receive an email notification.

(viii) Close the window and return to the previous screen by clicking b

note that you must **Save** or **Submit** your changes before choosing this action or your information will be lost.

Section 6: Payment Authorizations

Payment Authorizations _must_ be submitted in order for recipients to get paid. Once payment authorizations have been approved, they will be submitted by the RF to the recipient's **Payroll Campus** for payment.

6.1 Creating a New Payment Authorization

Payment Authorizations can only be created after an appointment has been approved by the RF. To begin creating a payment authorization, click on the **Payment Authorization** icon or tab from your **Main Dashboard** (see figure 11).

Figure 11: The System's **Dashboard**.

This will bring you to the **Payment Authorization** screen. This screen displays the following information (see figure 12).

1) **Employee**: These are the recipients of summer salary payments. They are the individuals for whom you have created **Appointments** and on whose behalf you can now create **Payment Authorizations**.

2) **Project No**: The project that was used to create the **Appointment** (encumbrance). This project will also be used to reimburse the college, after payment is made.

3) **College:** This is the **Payroll College** of the recipient. This is the college which will receive the payment authorization after it's processed and will issue payment to the recipient.

4) **Encumbrance**: This is the sum total of the **Original Encumbrance** and any **Adjustments** that were processed for this appointment. The sum total of all payment authorizations submitted for the summer on a project cannot exceed this amount.

5) **Amount Authorized (YTD)**: This is the sum total of all payment authorizations processed for this appointment.

6) Note that you can search for appointments by either a project number or employee name. Click the **radio button** and then enter the (partial) **value** you are looking for. The dark bar will display possible items. Click on the item, then click 'Select'.

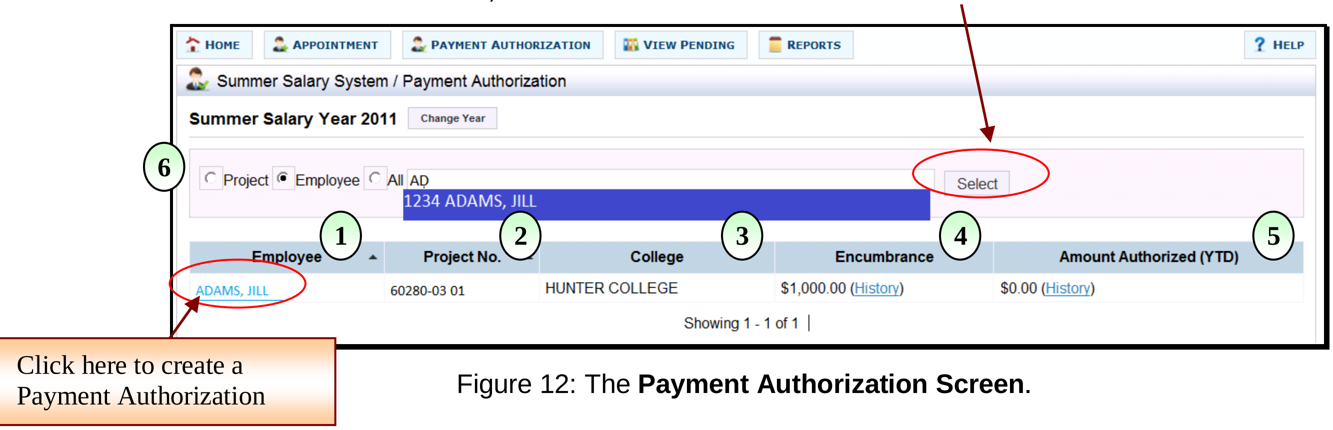


Figure 12: The **Payment Authorization Screen**.

To begin creating a payment authorization, click the recipient's name (see figure 12).

This will bring up the **Payment Authorization** screen (see figure 14).

For your convenience, the **Header** portion of this screen displays the following information (see figure 13):

1) **Total Amount Encumbered (YTD)**: This is the sum total of the original encumbrance and any adjustments that were processed for this appointment.

2) **Annual Salary**: This is the recipient's annual salary. If this number is incorrect, please contact CUNY's Payroll Manager, Shakira Smith, at 646-313-8260, or via email Shakira.Smith@cuny.edu .
3) **Maximum Allowable Salary (Summer)**: This is the maximum allowable salary for the recipient for the entire summer. Most projects allow **Three-Ninths** of the recipient's **Annual Salary**; however, **NSF** projects only allow **Two-Ninths** of the **Annual Salary**. Please note that this number is for your reference only.
4) **Maximum Allowable Salary (Monthly)**: This is the monthly limit that the recipient can receive. In most cases it's **One-Ninth** of the recipient's **Annual Salary**.
5) **Maximum Allowable Salary (Pay Period)**: This is the pay period limit that the recipient can receive. Please note that the sum total of all payment authorizations submitted for a pay period in the summer on a project cannot exceed this amount.

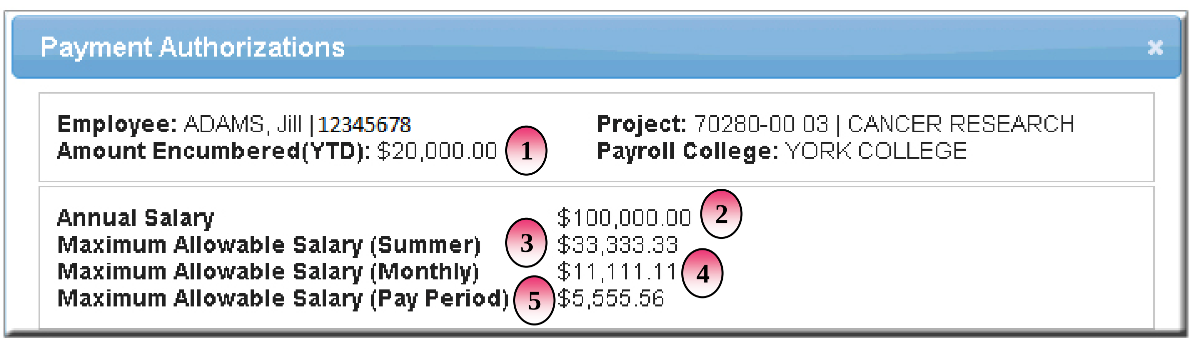


Figure 13: Payment Authorization Header.

To begin creating a payment authorization, check the check-box next to the **Pay Period** that you wish to process (see figure 14).If you wish to allocate the entire encumbrance across all pay periods, select all pay periods
Next, enter the appropriate payment amount in the **Pending (+/-)** column against each selected **Pay Period** (see figure 14).

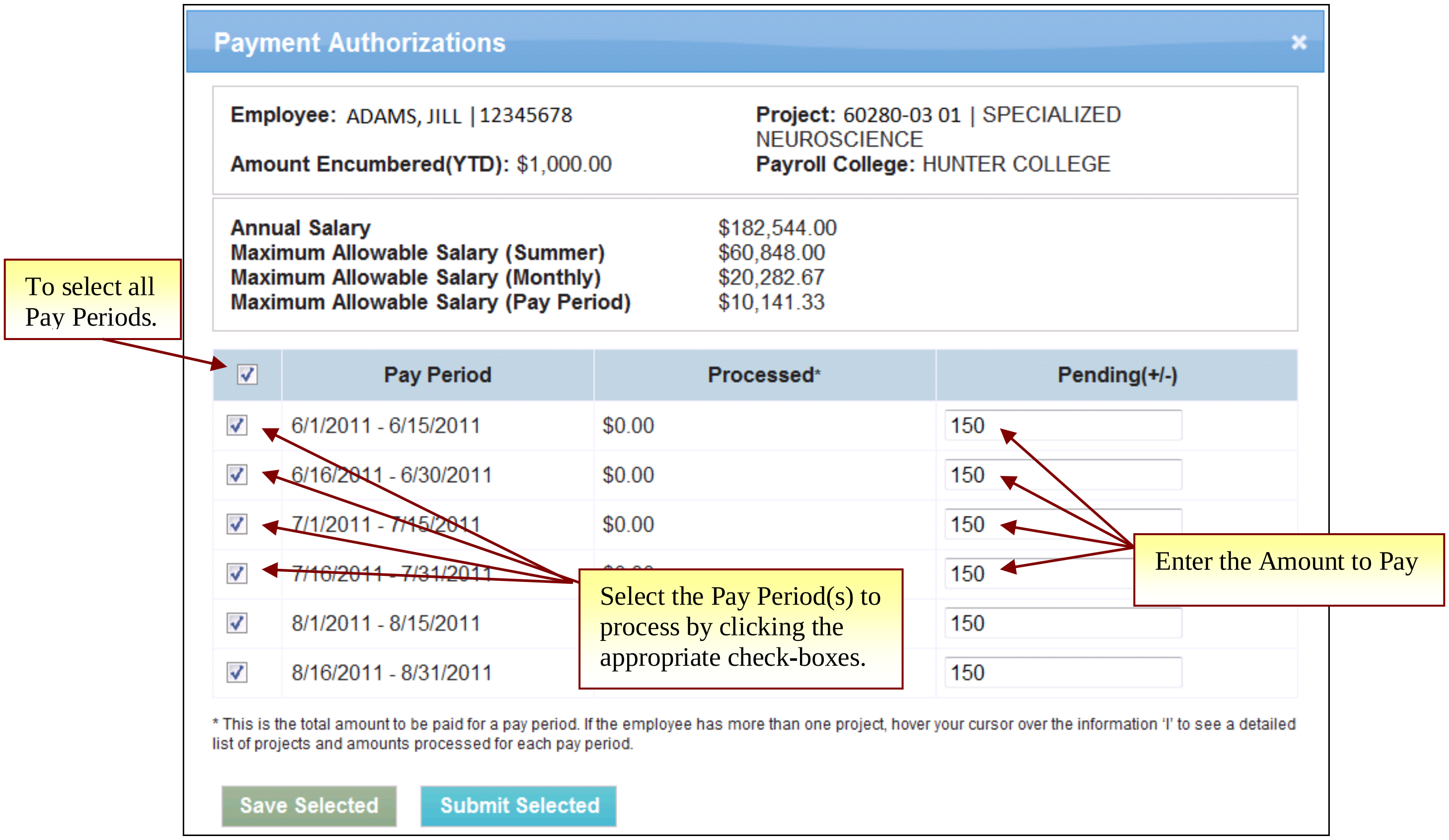


Figure 14: The **Payment Authorization Screen**

Finally, click **Save Selected** to save the information entered for submission at a later time, or click **Submit Selected** information for processing.

> ***Note***: Since **Payment Authorizations** must be submitted after work is completed (after the fact), you will only be able to save **Payment Authorizations** for future pay periods. Submissions can be performed by the P.I. or grants officer after the pay period is over.

6.1 Modifying an Existing New Payment Authorization

After your **Payment Authorizations** have been processed, (after the pay period is over and payment has been authorized) they will appear in the **Processed** column in the **Payment Authorization** screen (see figure 15).

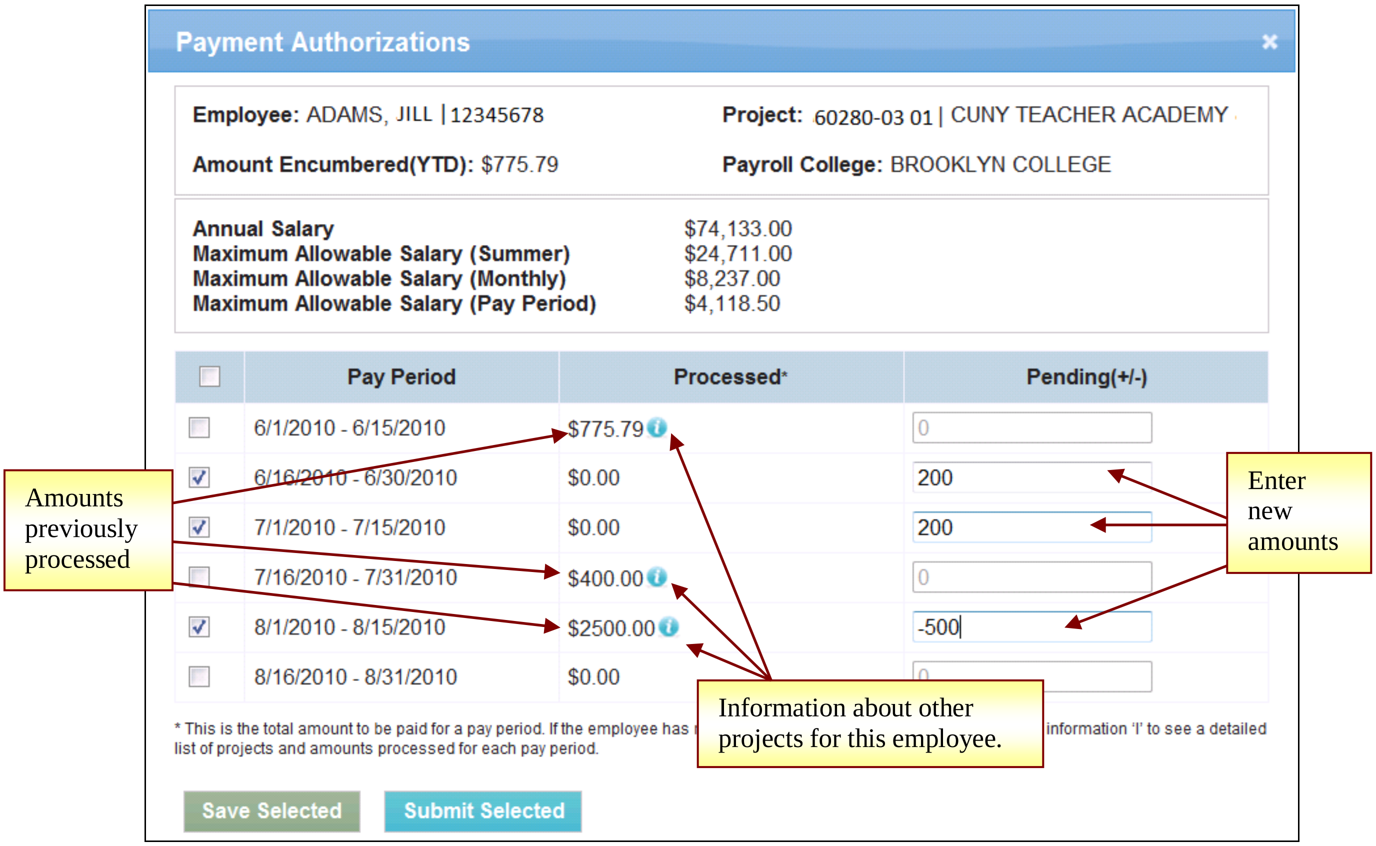


Figure 15: Modifying an **Existing** Payment Authorization.

To enter a new amount or to adjust an amount already processed, click the check-box beside the appropriate pay period and enter an amount in the **Pending (+/-)** column. This can be a new amount or an adjustment.

To finish your entry, click Save Selected to save your information entered for submission at a later time, or click Submit Selected your information for processing.

Section 7: View Pending

Your **View Pending** section enables you to take action on transactions (**Appointments** or **Payment Authorizations**) that require your attention. For example, this is where you would approve/submit a transaction that you had saved. This section also allows you to follow the progress of your transaction after you have approved/submitted it.

Transactions remain in this section until they have been fully processed. For Appointments, this means that they will remain here until they are approved by an RF processor. Payment Authorizations will remain here until they are approved by a grants officer.

7.1 Available Functions

From your **View Pending** section, you may do the following:

1) **Approve** transactions that were saved by you, or that were submitted for your approval. The latter is only applicable to grants officers.
2) **Audit** the actions taken on a transaction. This allows you to see who performed various actions on your transaction.
3) **Delete** transactions that were saved by you or submitted to you.
4) **Recall** transactions that were submitted by you. You may choose to perform this step in order to make changes and resubmit a transaction. Please note that you will only be able to perform this action as long as the next person in the workflow has not approved the transaction. For example, a P.I., can recall a transaction only until the grants officer has approved. After grants officer approval, it cannot be recalled. Similarly, a grants officer can recall an appointment so long as the RF processor has not processed it.
5) **Reject** transactions that were submitted to you for approval. Rejecting a transaction sends it back to the P.I. who submitted it. An email with optional comment will be generated.
6) **View Details** of the pending transactions. This includes the encumbered amount and information about the recipient's salary limits (yearly, monthly, and pay period).

7.2 Accessing Your Transactions

To access this section, click the **View Pending** icon or tab from your **Dashboard**. Next, selecting the **Type** of transaction you would like to view (i.e. appointment or payment authorization) and click 

ure 16). This will bring you to your **View Pending** screen.

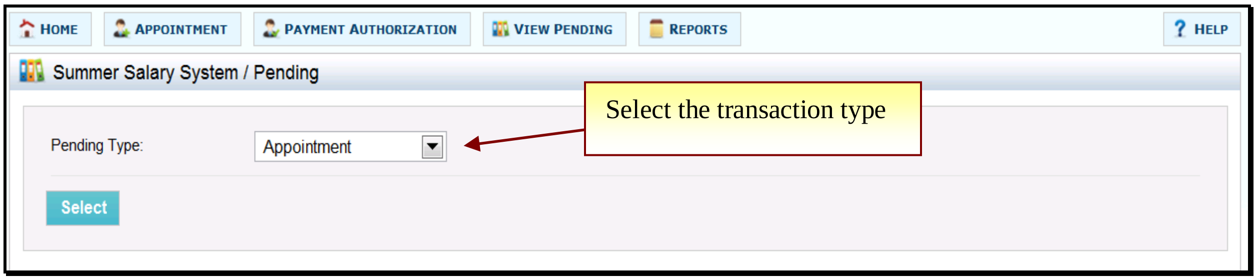


Figure 16: Your system's **Dashboard**.

On the next screen you can change the year and use search criteria to locate a particular transaction. The available functions are displayed below each transaction (see figures 17 and 18). To perform an action, click the button describing the action.

Mass Approval is available by clicking on the topmost check box. All transactions valid for your approval will be checked. Click **Approve Selected** to process. If some transactions encounter errors, the other transactions will process normally.

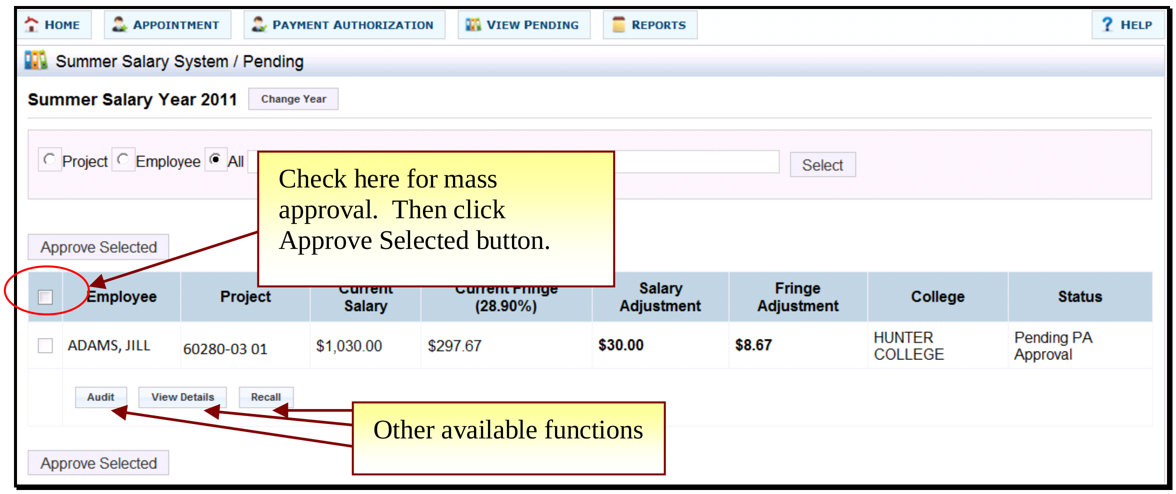


Figure 17: View **Pending Appointments** Screen

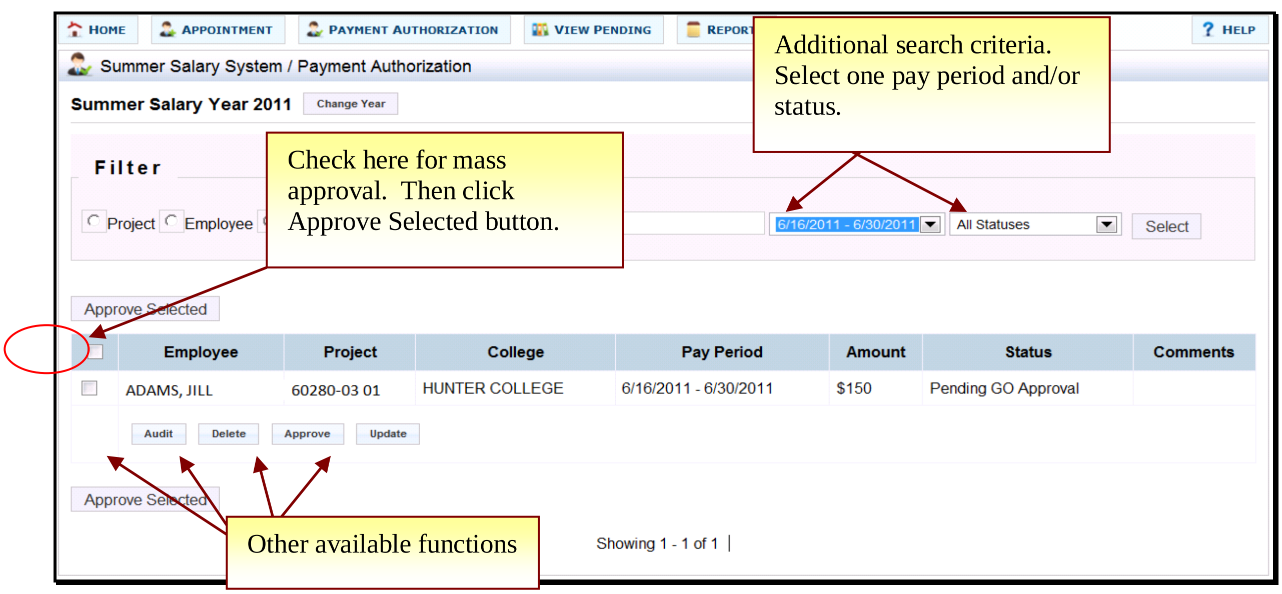


Figure 18: View **Pending Payment Authorizations** Screen

Section 8: Reports

Running Reports: Select the Reports tab from anywhere in the system. and click on a report to run. The selection of reports available to you is determined by your role in the organization.

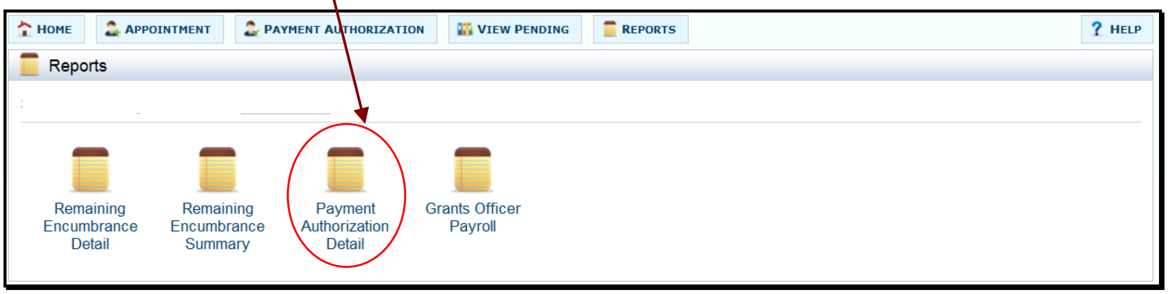


Figure 19: Reports Menu

Selection Criteria: Make sure you have selected the correct year. Not all reports have any additional selection criteria. You are always limited to viewing your own projects and/or college. Click on **Show Report** to run.

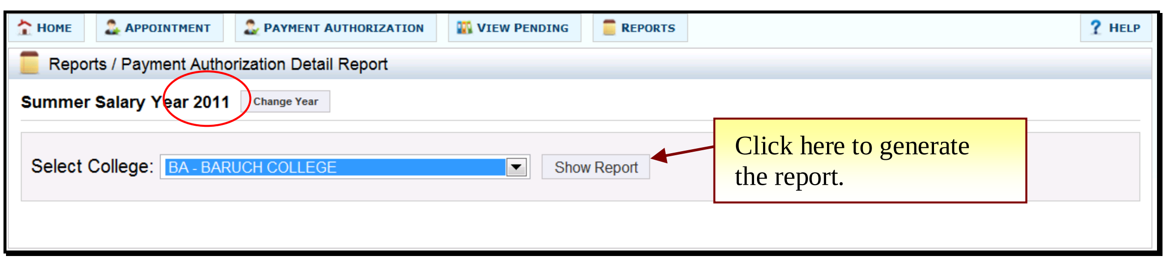


Figure 20: Example of Report Request Screen

Export to Excel: You can view the reports on the web or export to another format. Click Select a format. Select Excel. Click Export.

If you choose to SAVE, you will be prompted to specify the file location of the spreadsheet.

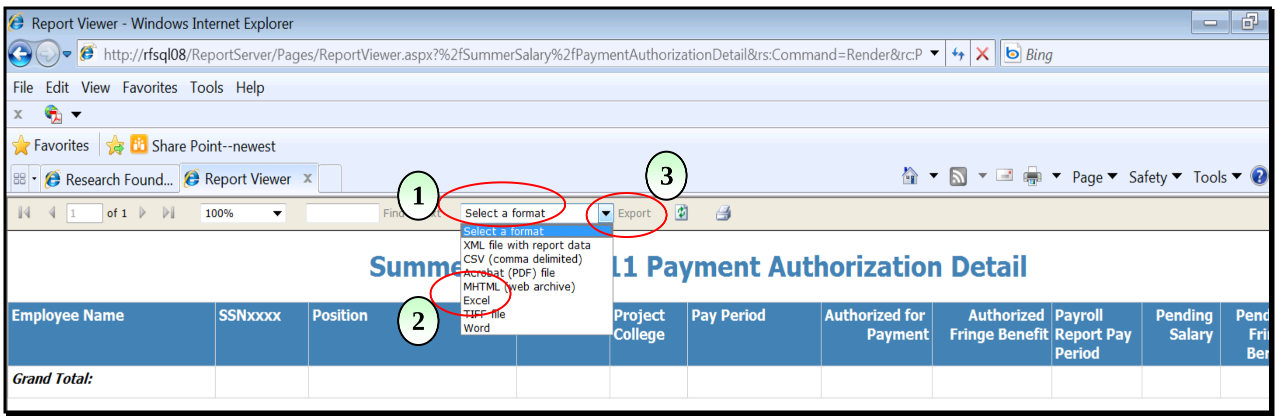


Figure 21: How to Download to a Spreadsheet

Return to Summer Salary: Click on your browser's Back Arrow to return to the report request screen.

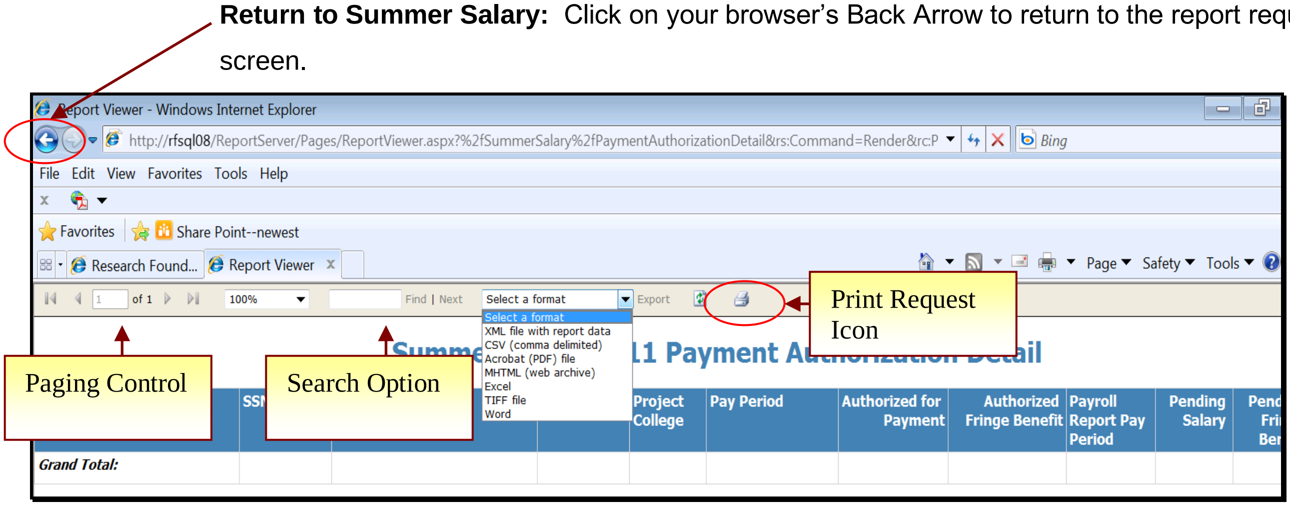


Figure 22: Features of the Report Viewer

Report Descriptions:

Remaining Encumbrance Detail or Summary.

Keep track of encumbrances that have not been spent. Unused amounts can be removed by entering a negative adjustment in the Appointment module.

Payment Authorization Detail.

View all payments authorized and pending amounts for your own college's projects. This is especially useful for users who do not have access to the Payment Authorization module.

GO Payroll Report.

View activity for all employees on your college's payroll even if they are working on another college's project.

Payroll Detail or Summary.

RF Finance uses these reports to reconcile CUNY payroll records to Summer Salary.

Payment History.

All college payroll data for use of CUNY payroll department.

Certification Status.

For PIs and GOs to see which employees have completed effort certification at the end of the summer. Remaining encumbrance is also displayed for those employees not eligible for certification. These amounts must be cleared for effort certification.

Finance Certification Report.

Available to RF Finance users to review effort certification by college and provide information for auditors.

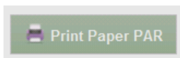
Summer Salary Available Budget.

This report allows the Grants Officer to view all projects belonging to their college that are budgeted for Summer Salary. Use the dollar amount cutoff to limit the report to projects that have substantial unused budget amounts.

Section 9: Effort Certification

The **Effort Certification** module enables you to certify effort percentage for yourself and employees on projects where you are a PI. Effort may be certified when all summer projects for an employee are completed and Payment Authorizations have been approved.

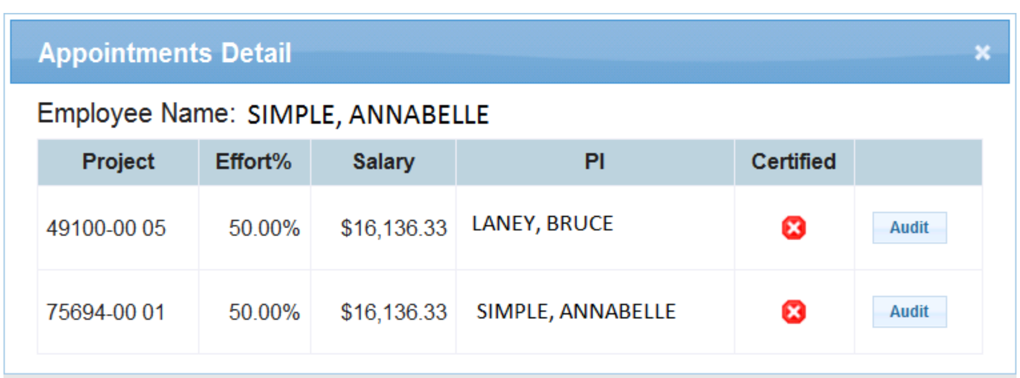
Effort must be certified within 45 days of the end of the summer session. Normally this will mean you must certify before October 15th. After that time you will need to print a standard blank PAR form, fill it out manually and submit it to the RF Finance department.



9.1 Available Functions

From **Effort Certification**, you may do the following:

1) **Certify Effort** for employees working on your projects. Click the Certify button to the right of the employee. Or use the checkboxes on left side of the screen and click on **Certify Selected**. You will see a pop-up box asking for confirmation of your intent. Click **Agree** to confirm.
2) **Revoke Certification** if adjustments/additions need to be made to Summer Salary appointments or Payment Authorizations.
3) **View Detail** of employee's projects. Click on the employee's name to display all their projects for the summer. If some projects are for other PIs, you will not be able to certify effort for those. The percentages of effort are calculated to be in proportion to the salary paid for Summer Salary.



Appointments Detail

Employee Name: SIMPLE, ANNABELLE

Project	Effort%	Salary	PI	Certified	
49100-00 05	50.00%	$16,136.33	LANEY, BRUCE		Audit
75694-00 01	50.00%	$16,136.33	SIMPLE, ANNABELLE		Audit

4) **Run a Report** of the status of your projects, including the amount of remaining encumbrance. Locate the **Reports** icon to request the **Certification Status** report.

9.2 Screen Display

1) **Filters.** Near the top of the page, you will notice three filters: "Unprocessed", "Processed", and "All" (see screen shot below). These filters have been developed to help you quickly isolate records that you wish to work on/review. Or search for a specific employee by last name, first name.

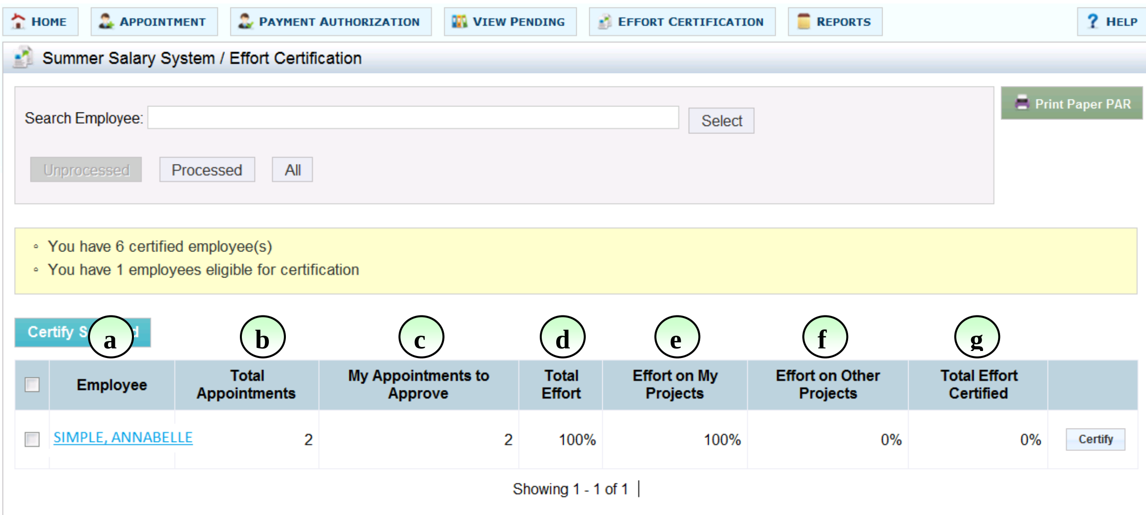
The "Unprocessed" filter displays employees on your projects that have not yet been fully certified.

The "Processed" filter displays employees on your projects that have been fully certified.

The "All" filter displays all employees on your projects eligible for certification (remaining salary encumbrance is zero), regardless of their certification status. If an employee does not appear, they will most likely appear in Pending Payment Authorizations as needing approval.

2) Columns

The columns in this module have been selected to help give you the most relevant certification information.



a) Employee: This is the employee's name. Clicking on the name will display the detail for the line –i.e. breakdown of effort by project, audit trail, etc.
b) Total Appointments: This is the total number of summer salary appointments for the employee and may include appointments on projects that are not yours.
c) My Appointments to Approve: These are the total number of summer salary appointments for the employee on your projects. In most cases this number will be the same as the "Total Appointments" number and will only differ when the employee is on multiple projects belonging to different PIs.
d) Total Effort: This is the employee's total effort across all projects.
e) Effort on My Projects: This is the employee's effort on your projects.
f) Effort on Other Projects: This is the employee's effort on projects belonging to other PIs.
g) Total Effort Certified: This is the total amount of effort that was certified for the employee (either by you or other users).

Section 10: Contact Information

General Questions: For general questions about the Summer Salary process or for specific questions about your transactions or payments please contact your Campus Grants Office.

Employee Information: If you are unable to add an appointment for a recipient because that individual's name does not appear in the system, or if the annual salary within the system for a recipient is incorrect, please contact CUNY's Payroll Manager, Shakira Smith, at 646-313-8260, or via email Shakira.Smith@cuny.edu.

Project Information: For information related to your projects (e.g. fund availability, classification, etc.) or for questions about unprocessed transactions that were approved by your campus grants officer, please contact your RF processor. Contact information for processors is available on the RF Website, under Staff Directory.

Technical Support: For questions about using the system please contact the RF summer salary administrator at 212-417-8402.

Reviewed By; Lisa DeStefano, Director
Approved By: Jarnee Bramlette, CFO

RF Summer Salaries
Semi-Monthly Certification and Paydate Deadlines
SUMMER 2021

Senior College Schedule					
Submission #	CUNY RF Certification Period From	To	RF Submits Approved Spreadsheet	Payroll Close Date	Senior College Check Date
1	June 1, 2021	June 15, 2021	June 23, 2021	June 28 2021	July 15, 2021
2	June 16, 2021	June 30, 2021	July 7, 2021	July 13, 2021	July 29, 2021
3	July 1, 2021	July 15, 2021	July 21, 2021	July 27 2021	August 12, 2021
4	July 16, 2021	July 31, 2021	August 4, 2021	August 10, 2021	August 26, 2021
5	August 1, 2021	August 15, 2021	August 19, 2021	August 24, 2021	September 9, 2021
6	August 16, 2021	August 24, 2021	September 2, 2021	September 7, 2021	September 23, 2021
7	na	na	September 16, 2021	September 21, 2021	October 7, 2021
8	na	na	September 30, 2021	October 4, 2021	October 21, 2021
9	na	na	November 23, 2021	November 30, 2021	December 16 2021
Final Submission 10	na	na	February 17, 2022	February 22, 2022	March 10, 2022

Community College Schedule					
Submission #	CUNY RF Certification Period From	To	RF Submits Approved Spreadsheet	Payroll Close Date	Community College Check Date
1	June 1, 2021	June 15, 2021	June 23, 2021	June 28 2021	July 9, 2021
2	June 16, 2021	June 30, 2021	July 7, 2021	July 13, 2021	July 23, 2021
3	July 1, 2021	July 15, 2021	July 21, 2021	July 27 2021	August 6, 2021
4	July 16, 2021	July 31, 2021	August 4, 2021	August 10, 2021	August 20, 2021
5	August 1, 2021	August 15, 2021	August 19, 2021	August 24, 2021	September 3, 2021
6	August 16, 2021	August 24, 2021	September 2, 2021	September 7, 2021	September 17, 2021
7	na	na	September 16, 2021	September 21, 2021	October 1, 2021
8	na	na	September 30, 2021	October 4, 2021	October 15, 2021
9	na	na	November 23, 2021	November 30, 2021	December 10 2021
Final Submission 10	na	na	February 17, 2022	February 22, 2022	March 4, 2022

Please note: Faculty can only work on RF grants from June 1 through August 24. The schedule above allows faculty members to certify work on a semi-monthly basis. Once fully approved and reconciled, grants are to be paid in the next available bi-weekly payroll.