

# Summer Salary System Manual

Version 3.0



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## Overview

Summer salary is additional compensation paid to eligible CUNY faculty members who perform research on sponsor funded awards outside of the nine-month academic year. Summer salary is paid in addition to the faculty member's academic year annual salary rate and the corresponding work must be performed during CUNY's summer period (June – August).

The Summer Salary System allows authorized users to process summer salary transactions electronically. To receive summer salary compensation, the college must create and submit an Appointment and Payment Authorization(s) through this system. Fully approved Payment Authorizations are compiled and sent to CUNY Payroll via reports on agreed upon deadline dates which result in summer salary payments to faculty on specific CUNY pay dates.

The Summer Salary System employs a two-part process that consists of creating the summer appointment and then approving payments as the summer progresses. The **Appointment** module allows the user to submit a lump sum total for a faculty member on a specific sponsored account. The **Payment Authorization** module then allows the authorized user to divide their appointment total among the defined pay periods for the summer. This arrangement can be saved ahead of time but approval for payment can only be made by the college at or near the end of each pay period.

After the entire summer period has passed, the **Effort Certification** module allows the PI to certify effort online for any employees with summer salary activity on their sponsored accounts.

## Users

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

### 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.

### 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:** 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 were submitted to them for approval<sup>1</sup>.
- **Recall** appointments that were submitted to the RF.
- **Reject** appointments that were submitted by a P.I.
- **Save** appointments.

### 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 submitted to them for approval<sup>2</sup>.
- **Reject** payment authorizations that were submitted by a P.I.

### 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.

**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.

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<sup>1</sup> G.O.s may edit a summer salary if they have access to the project(s) used to pay that summer salary.

<sup>2</sup> G.O.s may edit a summer salary if they have access to the project(s) used to pay that summer salary.

## Understanding Workflow

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.

### The Appointment Workflow

Figure 1 illustrates how an appointment flows between users and how its status (shown with arrows) is changed by each user's action.

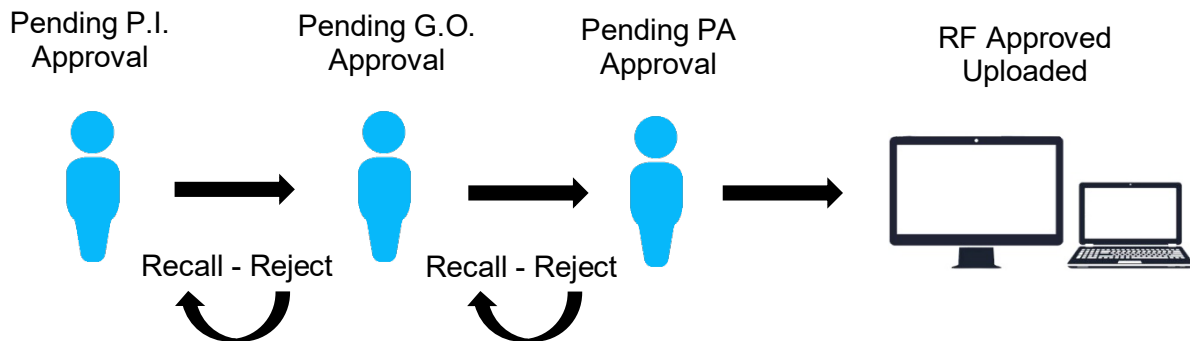
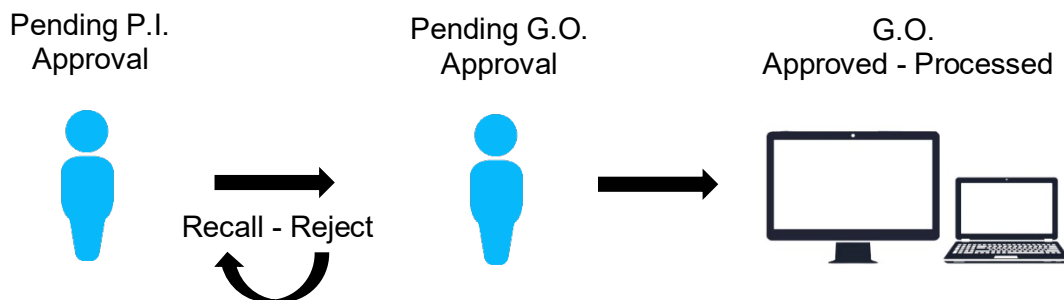


Figure 1

### The Payment Authorization Workflow

Figure 2 illustrates how a payment authorization flows between users and how its status (shown with arrows) is changed by each user's action.

#### Payment Authorization



#### Payment Processing



Figure 2

## Accessing the System

The Summer Salary System is available via the RF Website. We begin with logging in, you must log in 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 **Electronic Tools** menu, please call the Summer Salary Administrator at 212-417-8402.

Once you have logged in with your **Username** and **Password** ❶, hover over **Electronic Tools** ❷, scroll down to **Summer Salary** ❸ and click on the link. After clicking on the link, figure 4 on page 6 will appear.

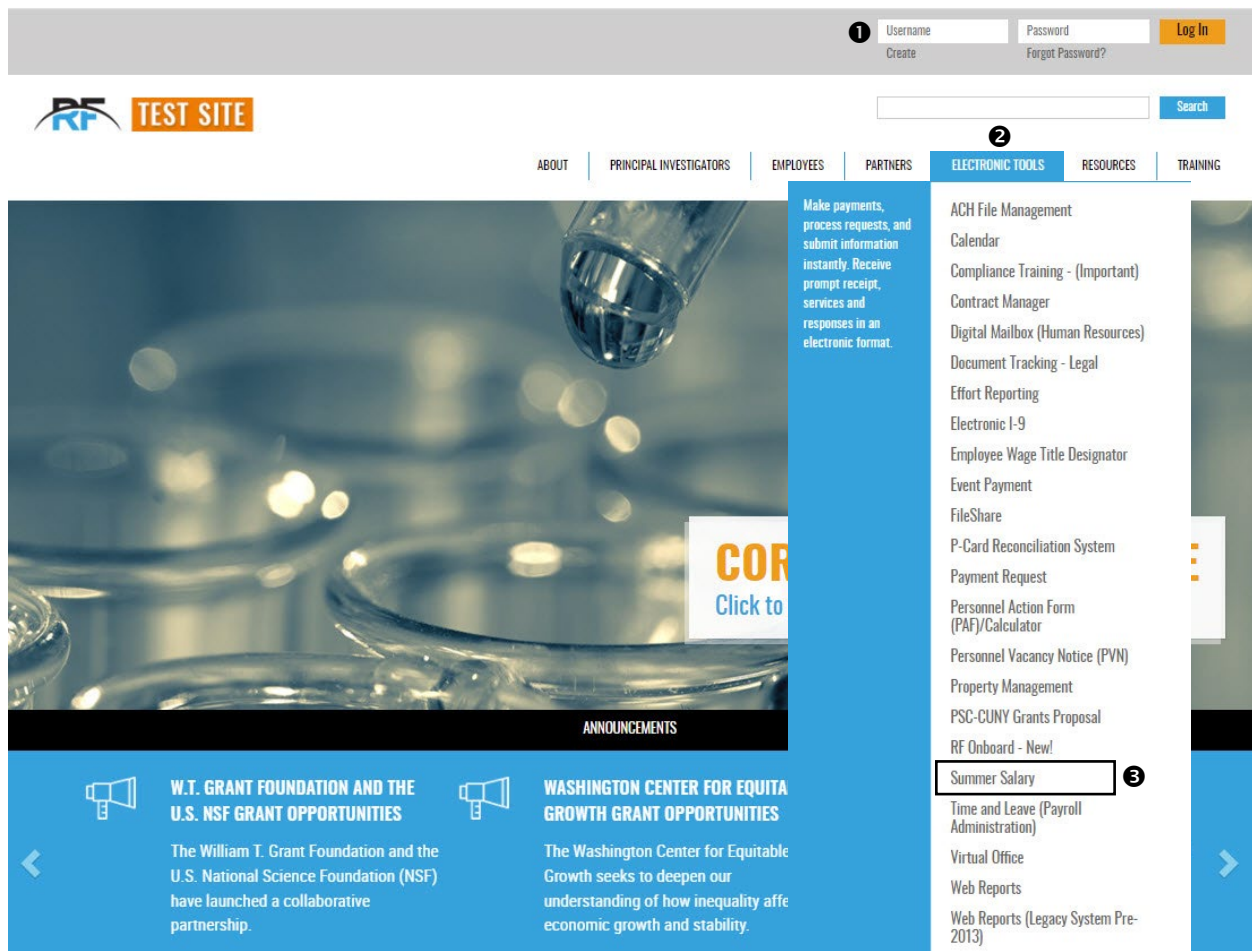


Figure 3

The Summer Salary System is divided into five modules: **Appointment ❶**, **Payment Authorization ❷**, **View Pending ❸**, **Effort Certification ❹**, and **Reports ❺**. You can enter each section by clicking on the module button or by clicking on the **icons ❻**. Next, we will discuss how to use each of these modules.

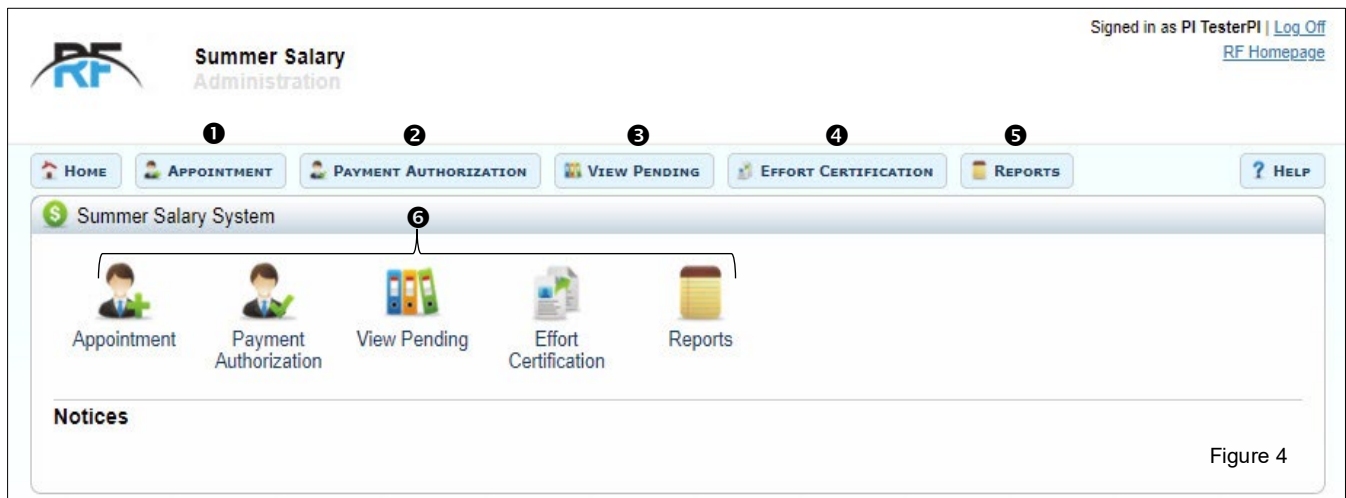


Figure 4



## Appointments

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

### Creating a New Appointment

From the Dashboard, click on the **Appointment Button** or **Icon ❶**. This will bring you to the main Appointment page seen in figure 8 on page 8.

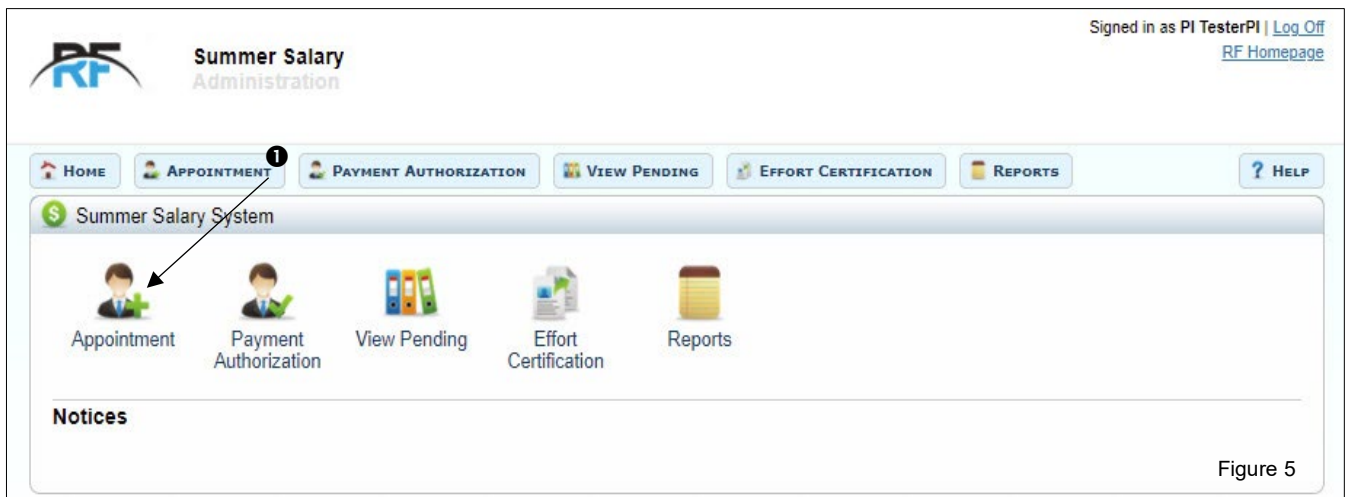


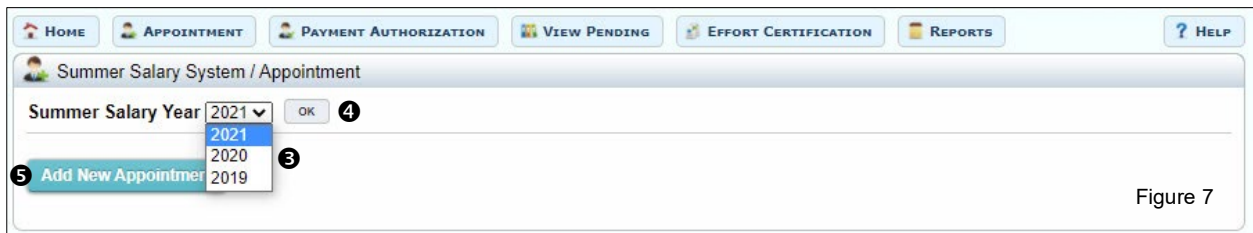
Figure 5

On this page, you need to verify that the **Year ❶** 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 ❷** and a **drop-down ❸** menu will appear, select the appropriate year. An Ok button will appear. Next, click **OK ❹** to complete your selection. With the correct year selected, click **Add New Appointment ❺** to begin creating a New Appointment. This will bring up a pop-up window where you can add New Appointment as seen in figure 8 below.



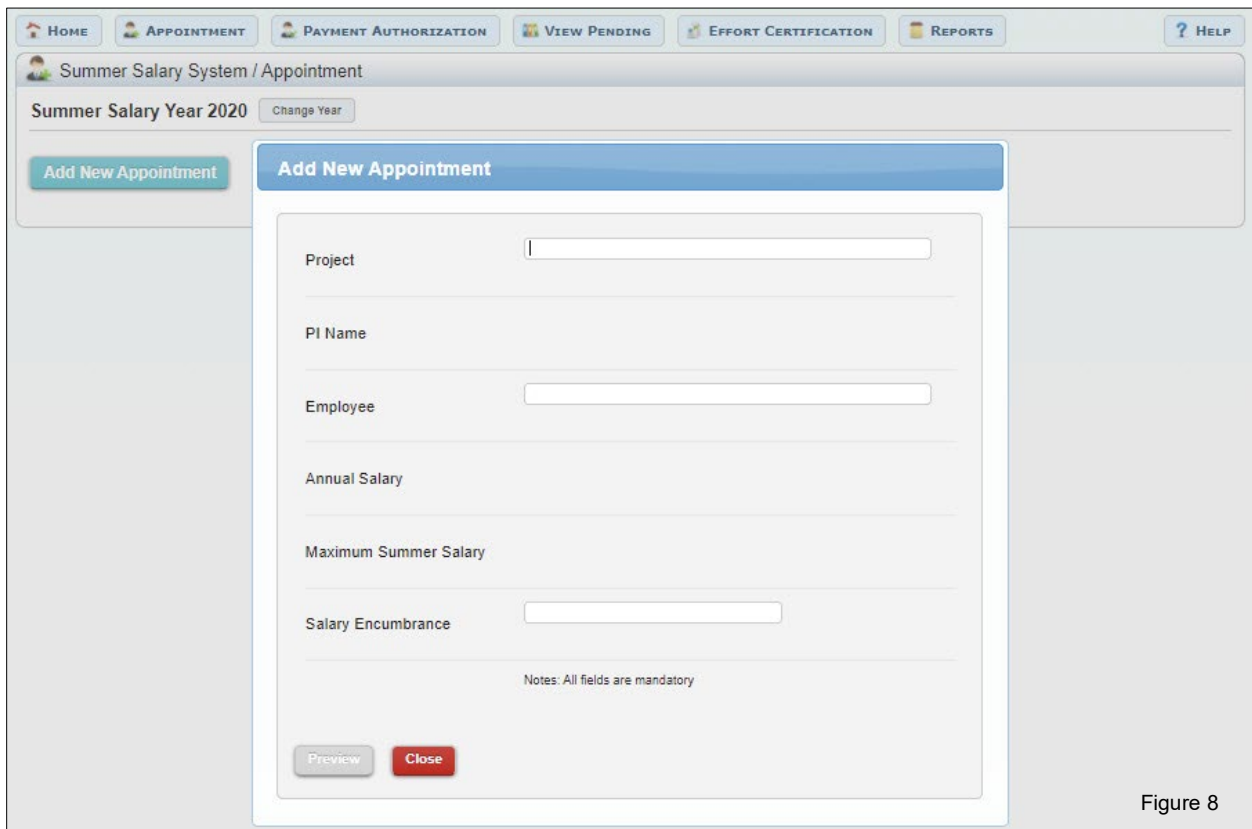
The screenshot shows the top navigation bar with links: HOME, APPOINTMENT, PAYMENT AUTHORIZATION, VIEW PENDING, EFFORT CERTIFICATION, REPORTS, and HELP. Below the navigation bar is the page title "Summer Salary System / Appointment". The main content area displays "Summer Salary Year 2021" with a "Change Year" button next to it. A blue "Add New Appointment" button is located below the year selection.

Figure 6



The screenshot shows the same page as Figure 6, but the "Change Year" button has been clicked, and a dropdown menu is now open. The dropdown menu lists the years 2021, 2020, and 2019. An "OK" button is visible next to the dropdown. The "Add New Appointment" button is still present.

Figure 7



The screenshot shows the "Add New Appointment" pop-up window open. The window contains the following fields: Project, PI Name, Employee, Annual Salary, Maximum Summer Salary, and Salary Encumbrance. Below the fields is a note: "Notes: All fields are mandatory". At the bottom of the window are "Preview" and "Close" buttons.

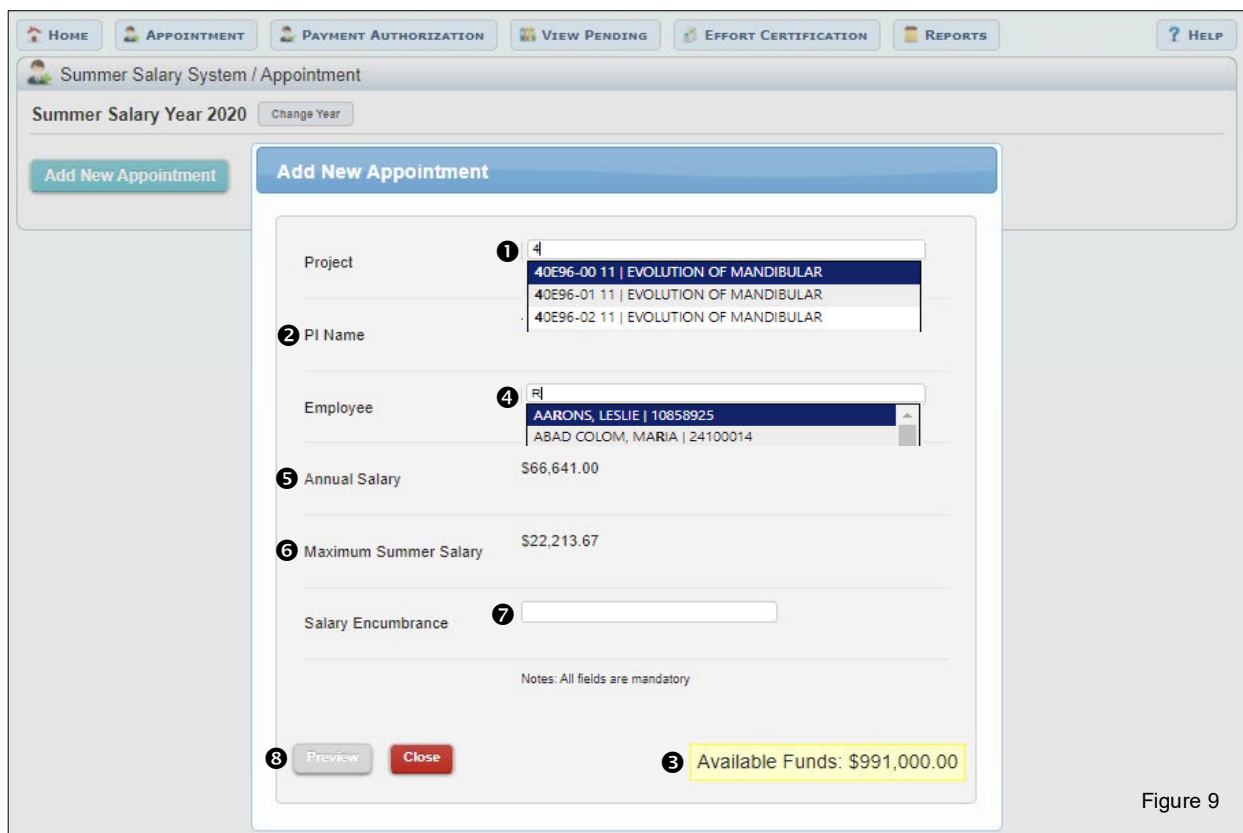
Figure 8

The next step is to enter the **Project Number ①**. By entering the first digit, a drop-down menu will appear to choose from. Once you choose a project, the **PI's Name ②** will automatically appear along with the **Available Funds ③**. Then choose the **Employee ④**. By entering the first letter a drop-down menu will appear for you to choose from. Once you choose a name, the **Annual Salary ⑤** and **Maximum Summer Salary ⑥** will appear. This is the employee's Maximum Salary for the summer across all projects. This may be less according to restrictions on a particular grant.

Next enter the **Salary Encumbrance ⑦**. After entering the Salary Encumbrance, you must click on the **Preview ⑧** button in order to see the information and save.

**Please Note:** The Preview button will be greyed out until all the required information is provided. After entering all the required information, the button will change colors and the option will be available.

After clicking the Preview button, the system will generate the Fringe, College, Allowable Salary, and Total Allowable Sal. along with new function buttons as seen in figure 9 below.



Summer Salary System / Appointment

Summer Salary Year 2020 [Change Year](#)

[Add New Appointment](#)

**Add New Appointment**

Project ① 4  
 40E96-00 11 | EVOLUTION OF MANDIBULAR  
 40E96-01 11 | EVOLUTION OF MANDIBULAR  
 40E96-02 11 | EVOLUTION OF MANDIBULAR

PI Name ②

Employee ④ R  
 AARONS, LESLIE | 10858925  
 ABAD COLOM, MARIA | 24100014

Annual Salary ⑤ \$66,641.00

Maximum Summer Salary ⑥ \$22,213.67

Salary Encumbrance ⑦

Notes: All fields are mandatory

Preview ⑧ Close

Available Funds: \$991,000.00 ③

Figure 9

**Please Note:** The system generates the following data based on the information you entered located in figure 9.

## Features

All features can be viewed in figure 10 on page 11.

**Fringe ❶**, this is the fringe amount that will be charged to your appointment. It's a percentage of the salary encumbrance entered.

**College ❷**, this is the recipient's Payroll College. This college will receive payment authorizations and issue payment to the recipient.

**Allowable Salary ❸**, this indicates the percentage of the recipient's allowable salary used by this appointment. This takes into account restrictions, such as the NSF 2-month restriction.

**Please Note:** You may place your cursor on the Questions Mark and a pop-up will appear with and explanation.

**Total Allowable Salary ❹**, 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.

**Please Note:** You may place your cursor on the Questions Mark and a pop-up will appear with and explanation. The same applies to the blue Information Circle.

**Edit ❺**, this is where you can change the information if needed.

**Save ❻** is required for the appointment before submission and it allows you to return to it at a later time to complete the appointment.

**Approve ❼** the appointment for submitting so it can proceed into next stage of the workflow.

**Please Note:** 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.

**Close ❽**, you can close the appointment If you wish to return to the previous screen.

**Please Note:** You must Save or Submit your changes before choosing this action or your information will be lost.

**Print ❾**, is an option you have for hard copies.

HOME

APPOINTMENT

PAYMENT AUTHORIZATION

VIEW PENDING

EFFORT CERTIFICATION

REPORTS

HELP

Summer Salary System / Appointment

Summer Salary Year 2020

Change Year

Add New Appointment

Add New Appointment

Project

40G25-00 12

PI Name

TesterPI, PI

Employee

AARONS, LESLIE | 10858925

Salary Encumbrance

\$5,000.00

1 Fringe (26.70%)

\$1,335.00

2 College

LAGUARDIA C. C.

3 Allowable Salary ?

19.9%

Indicates the percentage of the employee's allowable salary used by this appointment.

4 Total Allowable Sal. ?

19.9%

No Appointments For Other Projects

Indicates the cumulative percentage of the employee's allowable salary used across all appointments. For employees with single appointments, this number will be the same as the "Allowable Salary" figure. For a breakdown by project, please place your cursor over

Edit

Save

Approve

Close

Available Funds: \$991,000.00

Figure 10

## 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 ❶** will be displayed below the Add New Appointment button.

**Please 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 information.

This section will display the Employee Name, Project, Current Salary, Current Fringe, College, Amount Authorized, Salary Utilized. You also have the option to Modify the Appointment, view the History for the Appointment and Print a hard copy.

To begin Modifying an appointment, click on the **Modify ❷** button. A pop-up modification window will display as seen in figure 12 on page 13.



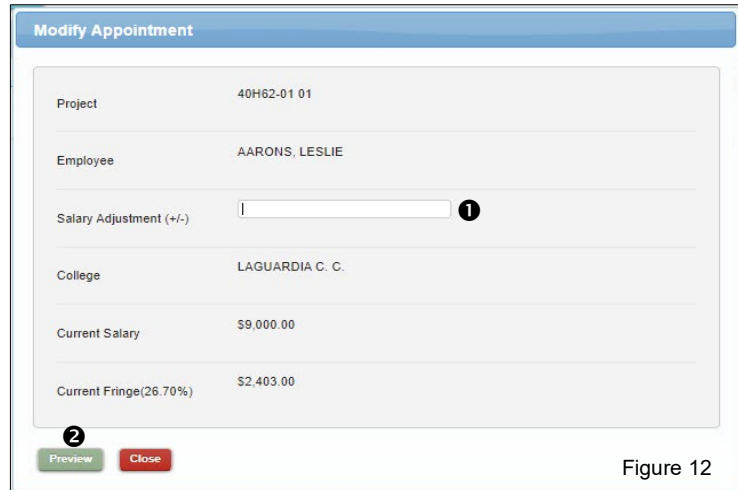
The screenshot shows the 'Summer Salary System / Appointment' interface. At the top, there is a navigation bar with buttons for HOME, APPOINTMENT, PAYMENT AUTHORIZATION, VIEW PENDING, EFFORT CERTIFICATION, REPORTS, and HELP. Below the navigation bar, the page title is 'Summer Salary System / Appointment'. Underneath, there is a section for 'Summer Salary Year 2021' with a 'Change Year' button. A blue button labeled 'Add New Appointment' is visible. Below this, there is a table with the following columns: Employee, Project, Current Salary, Current Fringe (26.70%), College, Amount Authorized (YTD), and Salary Utilized. The table contains one row for 'AARONS, LESLIE' with project '40H62-01 01', a current salary of '\$9,000.00', and a salary utilized of '34.48%'. To the right of the table, there is a 'Modify' button (labeled with a circled 2) and a 'History' button. A print icon is also visible.

❶ Employee	Project	Current Salary	Current Fringe (26.70%)	College	Amount Authorized (YTD)	Salary Utilized	
AARONS, LESLIE	40H62-01 01	\$9,000.00	\$2,403.00	LAGUARDIA C. C.	\$0.00	34.48%	❷ Modify History 

Figure 11

To modify the appointment's current Encumbrance Amount, you can enter a positive or negative adjustment in the **Salary Adjustment (+/-)** textbox ❶. For example, to add \$500 to the existing appointment, enter 500 in the **Encumbrance Adjustment (+/-)** textbox.

Next, click **Preview** ❷ to review the information generated by the system As seen in figure 12.



**Modify Appointment**

Project	40H62-01 01
Employee	AARONS, LESLIE
Salary Adjustment (+/-)	<input type="text"/> ❶
College	LAGUARDIA C. C.
Current Salary	\$9,000.00
Current Fringe(26.70%)	\$2,403.00

❷ **Preview** **Close**

Figure 12

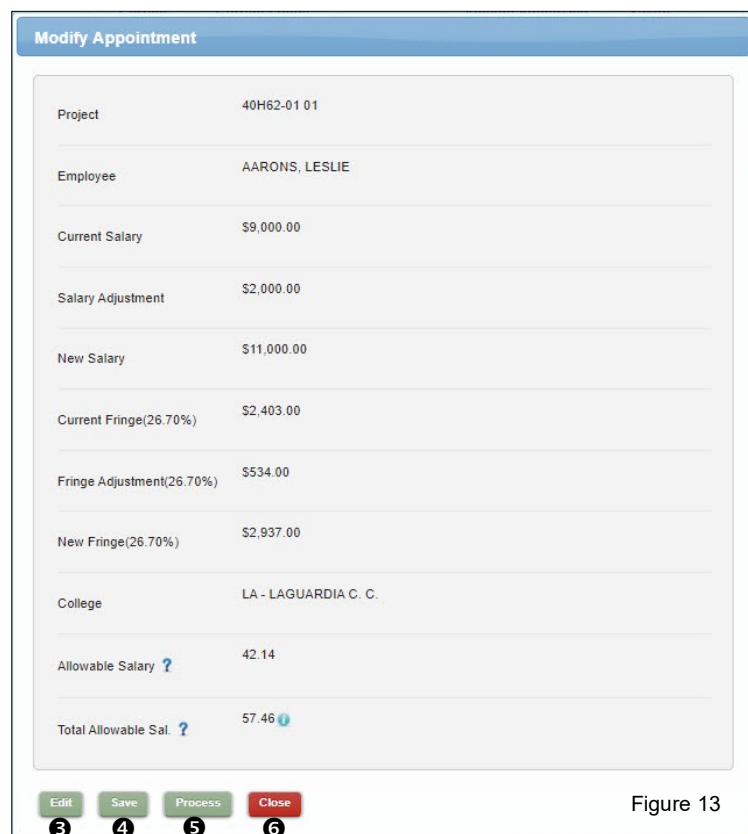
After you have reviewed the information, you may choose to **Edit** ❸, in this section you can edit the Salary Adjustment.

**Save** ❹, allows to save the information and proceed to the next step. This will also allow to save the information and return at a later period to complete the process.

**Process** ❺, by clicking Process, 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.

**Close** ❻, allows you to return to the previous screen.

**Please Note:** You must **Save** your changes before choosing this action or your information will be lost.



**Modify Appointment**

Project	40H62-01 01
Employee	AARONS, LESLIE
Current Salary	\$9,000.00
Salary Adjustment	\$2,000.00
New Salary	\$11,000.00
Current Fringe(26.70%)	\$2,403.00
Fringe Adjustment(26.70%)	\$534.00
New Fringe(26.70%)	\$2,937.00
College	LA - LAGUARDIA C. C.
Allowable Salary ?	42.14
Total Allowable Sal. ?	57.46 ⓘ

❸ **Edit** ❹ **Save** ❺ **Process** ❻ **Close**

Figure 13

## Payment Authorizations

**Payment Authorizations** must be submitted 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.

### 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 1**.

This will bring you to the **Payment Authorization** screen in figure 15 on page 15.

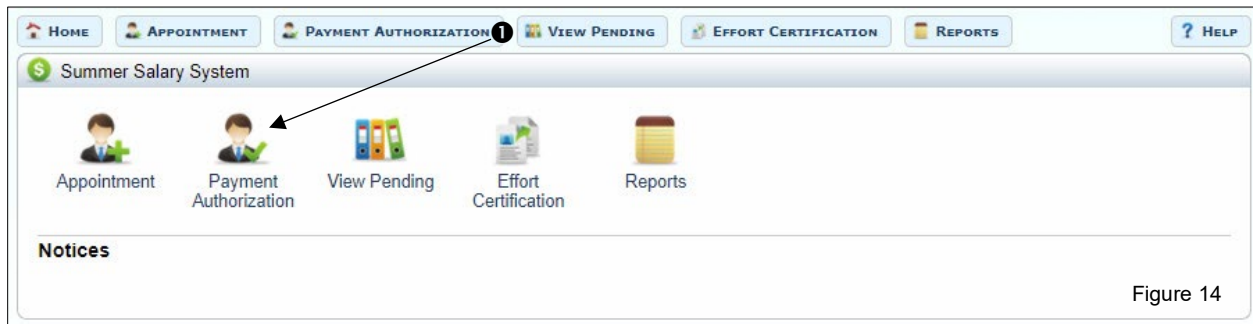


Figure 14



In this screen you have the following features:

**Search Feature ❶**, you can search for appointments by either a Project Number, Employee Name, and All. Once you place the first letter of the name or the first digit of a number, the system will automatically start the search with a drop-down menu to choose from. Once you make your selection, click on the **Select ❷** button.

**Employee ❸**, 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.

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

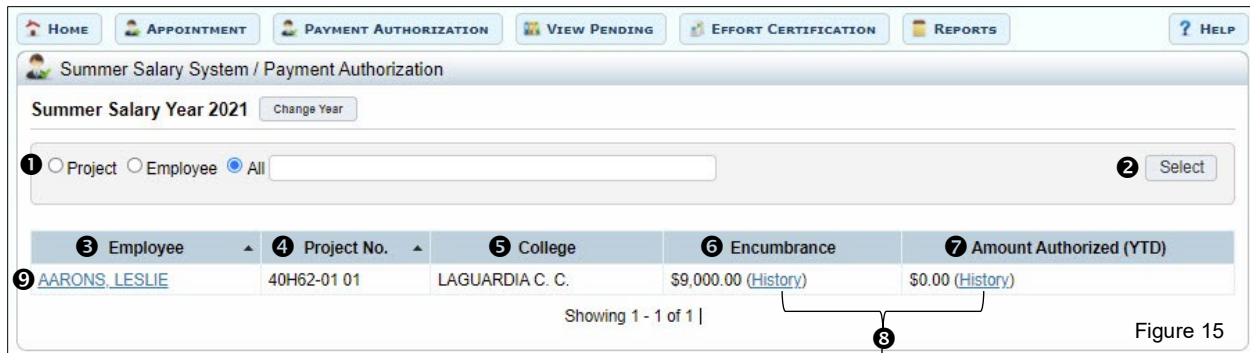
**College ❺**, this is the Payroll College of the recipient. This is the college which will receive the payment authorization after it's processed and will issue payment to the recipient.

**Encumbrance ❻**, 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.

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

**History ❽**, by clicking on the History link, a pop-up window will appear with the history.

To begin creating a payment authorization, click the **Recipient's Name ❾**. This will bring up the Payment Authorization screen in figure 16 on page 16.



Summer Salary System / Payment Authorization

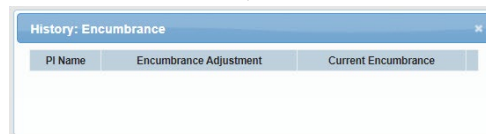
Summer Salary Year 2021 [Change Year](#)

❶ ☐ Project ☐ Employee ☒ All  ❷ [Select](#)

❸ Employee	❹ Project No.	❺ College	❻ Encumbrance	❼ Amount Authorized (YTD)
❾ AARONS, LESLIE	40H62-01 01	LAGUARDIA C. C.	\$9,000.00 <a href="#">(History)</a>	\$0.00 <a href="#">(History)</a>

Showing 1 - 1 of 1 |

Figure 15



History: Encumbrance

PI Name	Encumbrance Adjustment	Current Encumbrance
---------	------------------------	---------------------

In this screen you have the following features:

❶ Displays the Employee Name, Project Number, Payroll College and Total Amount Encumbered (YTD). This is the sum total of the original encumbrance and any adjustments that were processed for this appointment.

**Annual Salary** ❷, 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.

**Maximum Allowable Salary (Summer)** ❸, 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.

**Maximum Allowable Salary (Monthly)** ❹, This is the monthly limit that the recipient can receive. In most cases it's One-Ninth of the recipient's Annual Salary.

**Maximum Allowable Salary (Pay Period)** ❺ This is the pay period limit that the recipient can receive. **Please Note:** the sum total of all payment authorizations submitted for a pay period in the summer on a project cannot exceed this amount.

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

The next step is to click on the **Save Selected** button ❾, if you wish to save the information and proceed at a later time or click on **Submit Selected** button ❿, to process the selected Pay Periods.

Payment Authorizations

❶ Employee: AARONS, LESLIE | 10858925  
Amount Encumbered(YTD): \$9,000.00

Project: 40H62-01 01 | RFCUNY TEST PROJECT  
Payroll College: LAGUARDIA C. C.

❷ Annual Salary \$117,466.00  
❸ Maximum Allowable Salary (Summer) \$26,103.56  
❹ Maximum Allowable Salary (Monthly) \$13,051.78  
❺ Maximum Allowable Salary (Pay Period) \$6,525.89

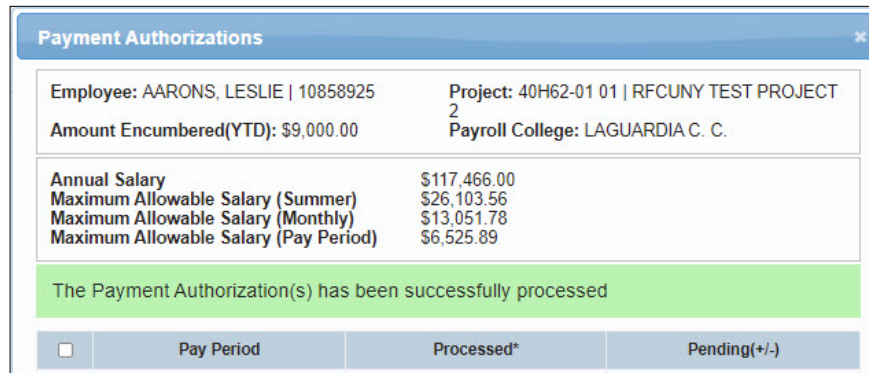
❷	Pay Period	Processed*	Pending(+/-) ❸
❻	6/1/2021 - 6/15/2021	\$0.00	0
<input type="checkbox"/>	6/16/2021 - 6/30/2021	\$0.00	0
<input type="checkbox"/>	7/1/2021 - 7/15/2021	\$0.00	0
<input type="checkbox"/>	7/16/2021 - 7/31/2021	\$0.00	0
<input type="checkbox"/>	8/1/2021 - 8/15/2021	\$0.00	0
<input type="checkbox"/>	8/16/2021 - 8/24/2021	\$0.00	0

\* This is the total amount to be paid for a pay period. If the employee has more than one project, hover your cursor over the information "I" to see a detailed list of projects and amounts processed for each pay period.

❾ Save Selected
❿ Submit Selected

Figure 16

After you submit the selected Pay Periods, a green banner will appear informing you of its success as seen below in figure 17.



**Payment Authorizations**

Employee: AARONS, LESLIE | 10858925      Project: 40H62-01 01 | RFCUNY TEST PROJECT 2  
 Amount Encumbered(YTD): \$9,000.00      Payroll College: LAGUARDIA C. C.

Annual Salary	\$117,466.00
Maximum Allowable Salary (Summer)	\$26,103.56
Maximum Allowable Salary (Monthly)	\$13,051.78
Maximum Allowable Salary (Pay Period)	\$6,525.89

The Payment Authorization(s) has been successfully processed

<input type="checkbox"/>	Pay Period	Processed*	Pending(+/-)
--------------------------	------------	------------	--------------

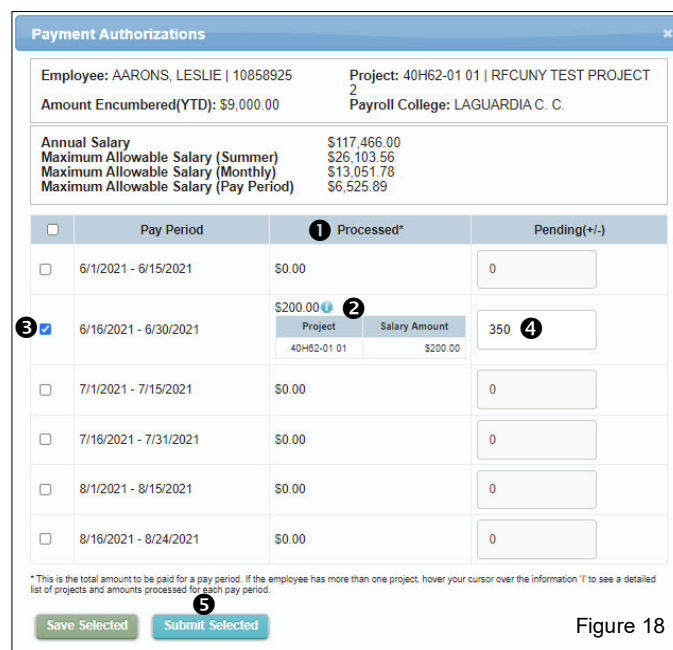
Figure 17

**Please Note:** Since Payment Authorizations must be submitted after the work is completed, 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.

## 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 ❶ in the Payment Authorization screen. In this example we see the amount of **\$200** ❷ as being proceed. When you hover over the blue information icon, the Project and Salary Amount information is displayed.

To modify this amount, click the **box** ❸ beside the appropriate pay period and enter an amount in the **Pending (+/-)** ❹ column. This can be a new amount or an adjustment. To finalize and submit the modification, click on the **Submit Selected** ❺ button.



**Payment Authorizations**

Employee: AARONS, LESLIE | 10858925      Project: 40H62-01 01 | RFCUNY TEST PROJECT 2  
 Amount Encumbered(YTD): \$9,000.00      Payroll College: LAGUARDIA C. C.

Annual Salary	\$117,466.00
Maximum Allowable Salary (Summer)	\$26,103.56
Maximum Allowable Salary (Monthly)	\$13,051.78
Maximum Allowable Salary (Pay Period)	\$6,525.89

<input type="checkbox"/>	Pay Period	❶ Processed*	Pending(+/-)
<input type="checkbox"/>	6/1/2021 - 6/15/2021	\$0.00	0
❸ <input checked="" type="checkbox"/>	6/16/2021 - 6/30/2021	\$200.00 ❷ <div> <div>Project</div> <div>Salary Amount</div> <div>40H62-01 01</div> <div>\$200.00</div> </div>	350 ❹
<input type="checkbox"/>	7/1/2021 - 7/15/2021	\$0.00	0
<input type="checkbox"/>	7/16/2021 - 7/31/2021	\$0.00	0
<input type="checkbox"/>	8/1/2021 - 8/15/2021	\$0.00	0
<input type="checkbox"/>	8/16/2021 - 8/24/2021	\$0.00	0

\* This is the total amount to be paid for a pay period. If the employee has more than one project, hover your cursor over the information ❶ to see a detailed list of projects and amounts processed for each pay period.

❺ Save Selected Submit Selected

Figure 18

## 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 the Grants Officer.

## Accessing Your Transactions

To access the section from the Home page, click the **View Pending ❶** from the Dashboard or the View Pending icon. This will bring you to the next screen as seen in figure 19 below.

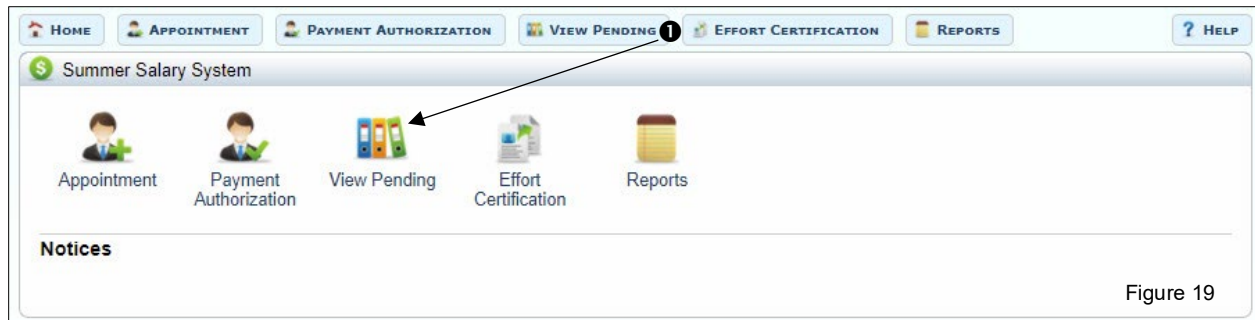


Figure 19

Next, select the type of transaction you would like to view, **Appointment** or **Payment Authorization ❷** in the drop-down menu. In this example we are choosing Payment Authorization. Then click **Select ❸**, this will bring you to your View Pending screen as seen in figure 21 on page 19.

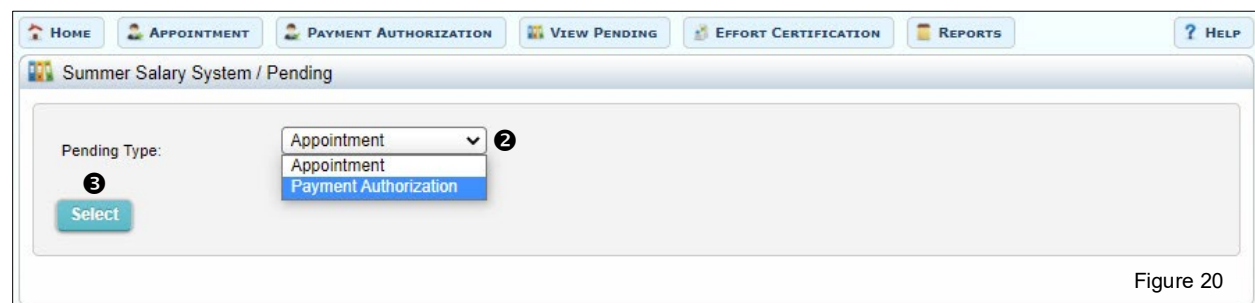


Figure 20

In this screen you have the following features:

**Search ❶**, this is where you can search for Pending Appointment. You may enter the Project, Employee. When you click on All Pay Periods and All Statuses, a drop-down menu will appear to choose from. Once a selection has been made, press the Select button. After selecting the employee, you have the following options before clicking on **Approve Selection ❷** to complete the process.

**Audit ❸**, this allows you to see who performed various actions on your transaction.

**Delete ❹**, this allows you to Delete transactions that were saved by you or submitted to you.

**Approve ❺**, allows you to approve transactions that were saved by you or that were submitted for your approval. See Approve Details on page 20.

**Update ❻**, by clicking Update, a **pop-window ❼** will appear allowing you to change the New Salary Amount ❸. The **Type ❾**, this can be changed by clicking on the arrow for a drop-down menu to choose from. You may leave a Comment or instructions ❿.

After completing the task, you have the option to **Save Update ①**, which allows you to return and submit at a later time. **Submit** or **Close** the window once complete.

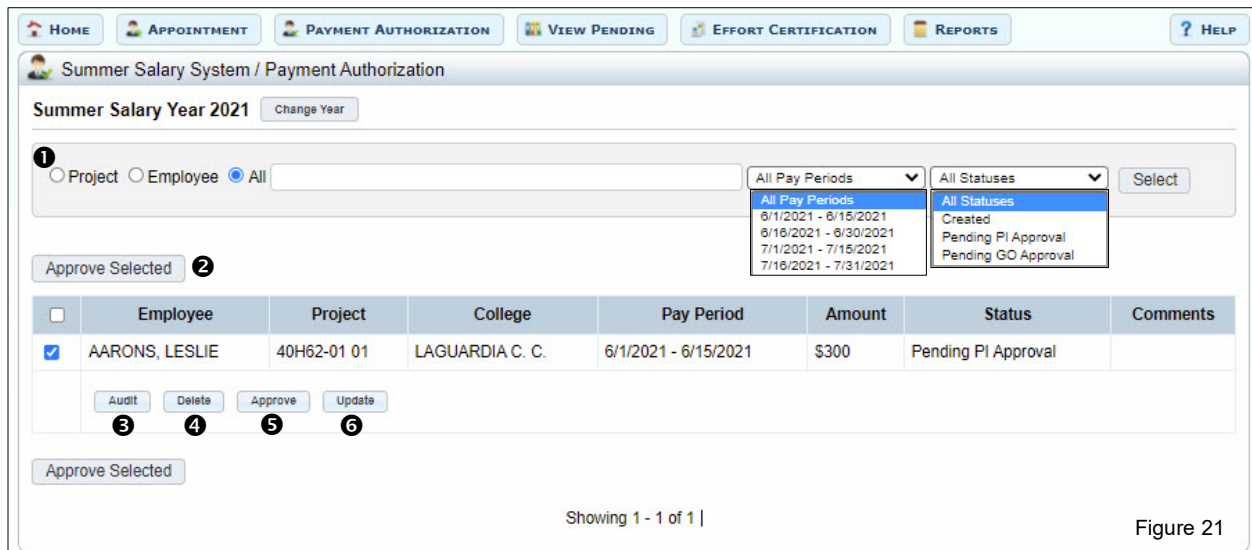


Figure 21

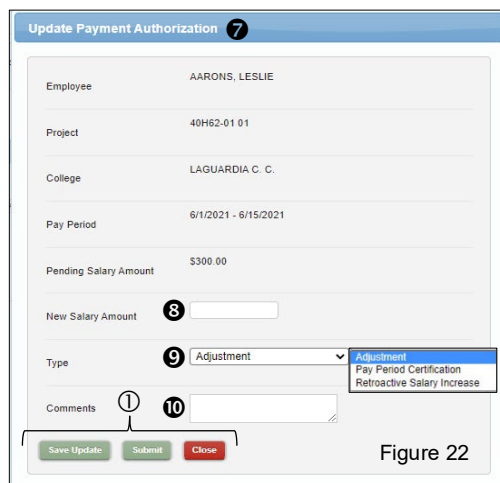


Figure 22

## Approve Details

**Approve ⑤** in figure 21 on page 19, When you click on Approve, a pop-up box will appear to Confirm or Cancel as seen in figure 23 below. After you Confirm ①, a yellow approved banner will appear ② as seen in figure 24. The window will then open completely as seen in figure 25. You now have a choice to see the **Audit Trail ③** or **Recall ④** the appointment to make changes then resubmit. The appointments will remain in this section until they are approved which moves then into the next stage.

**Please Note:** The latter is only applicable to Grants Officers.

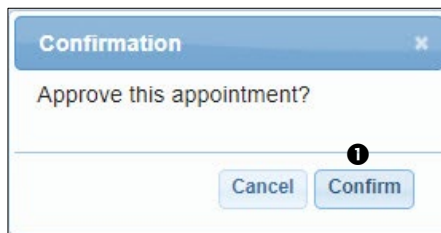


Figure 23

<input type="checkbox"/>	Employee	Project	College	Pay Period	Amount	Status	Comments
<input type="checkbox"/>	AARONS, LESLIE	40H62-01 01	LAGUARDIA C. C.	6/1/2021 - 6/15/2021	\$300	Pending PI Approval	
②	Audit Delete Approve Update This appointment is approved. Reloading the page for change now...						Figure 24

[HOME](#)
[APPOINTMENT](#)
[PAYMENT AUTHORIZATION](#)
[VIEW PENDING](#)
[EFFORT CERTIFICATION](#)
[REPORTS](#)
[HELP](#)

Summer Salary System / Payment Authorization

Summer Salary Year 2021 [Change Year](#)

☐ Project
 ☐ Employee
 ☒ All
 
 All Pay Periods
 All Statuses
 [Select](#)

[Approve Selected](#)

<input type="checkbox"/>	Employee	Project	College	Pay Period	Amount	Status	Comments
<input type="checkbox"/>	AARONS, LESLIE	40H62-01 01	LAGUARDIA C. C.	6/1/2021 - 6/15/2021	\$300	Pending GO Approval	

Audit Recall

③ ④

[Approve Selected](#)

Showing 1 - 1 of 1 |

Figure 25

## Effort Certification

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

To access the Effort Certification section from the Homepage, click on either the name on the **Main Dashboard** or the **Icon 1**. The Effort Certification window will open as seen in on the next page.

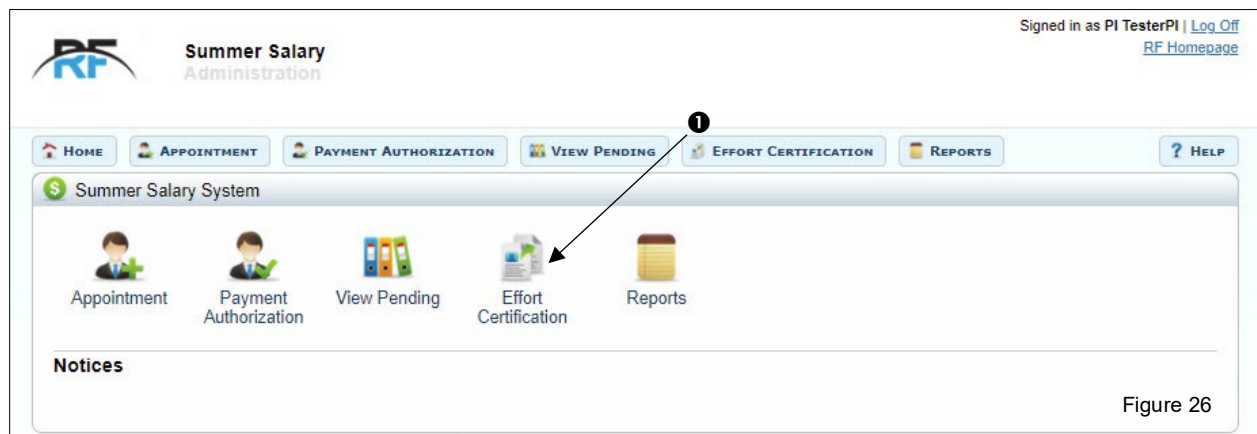


Figure 26



After clicking on Effort Certification button or icon, the window below will open. You can search for an appointment by **Unprocessed**, **Processed** and **All** button ❶. The All button, 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.

Effort should be certified within 45 days of the end of the summer session. Normally this will mean you certify before October 15th. For retroactive appointments or irregular circumstances, you may need to print a standard blank **PAR Form** ❷, fill it out manually and submit it to the RF Finance Department as seen in figure 28 on page 23.

In this screen you have the following features:

**Employee** ❸, this is the employee's name. Clicking on the name will display the detail by Project, Effort Percentage, Salary, PI and Certified. You can also view the Audit trail as seen in figure 27.

**Total Projects** ❹, This is the total number of summer salary appointments for the employee and may include appointments on projects that are not yours.

**My Projects to Approve** ❺, 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.

**Effort on Projects** ❻, This is the employee's effort on all research projects.

**Effort on Other Activity** ❼, This denotes a percentage based on Supplemental Salary paid to the employee for Instruction or Department Administration during the summer. This data is not available until late fall.

**Total Effort Certified** ❽, This is the total amount of effort that was certified for the employee (either by you or other users).

**Certify** ❾, is where the Terms and Conditions will appear. You can either Agree and Certify the Appointment or Decline the Appointment as seen in figure 30 on page 23. When you agree and certify an Appointment, the screen will automatically be updated.

Employee	Total Projects	My Projects to Approve	Effort on Projects	Effort on Other Activity	Total Effort Certified	Certify
AARONS, LESLIE	2	2	100%	0%	0%	Certify
ADEBOLA, ADIJAT	1	1	83.35%	16.65%	0%	Certify
ANTONAKOS, EVANGELIA	2	1	38.64%	61.36%	0%	Certify
ATAMTURKTUR, SEHER	1	1	57.86%	42.14%	0%	Certify
GHARBARAN, RAJENDRA	2	1	52.33%	47.67%	0%	Certify
HOROZOV, IVAN	3	1	55.45%	44.55%	0%	Certify
SKAGGS, SHELDON	2	1	31.02%	68.98%	0%	Certify
TIAN, RUJIN	2	1	37.25%	62.71%	0%	Certify

Figure 27



**RESEARCH FOUNDATION  
CITY UNIVERSITY OF NEW YORK  
Personnel Activity Report for Sponsored Activities**

Semester / Year \_\_\_\_\_

College: \_\_\_\_\_ Name: \_\_\_\_\_  
Department: \_\_\_\_\_ Title: \_\_\_\_\_  
S.S.# (last 4 digits): \_\_\_\_\_

**I. SPONSORED PROJECTS ADMINISTERED THROUGH THE RESEARCH FOUNDATION including Mandatory and Voluntarily Committed Cost Share**

Project Description (for RF Projects Indicate RF Acct.#)	Period	Organized Research (a)	Other Sponsored Activity (b)	Percent

\* Included in the percentage is the cost shared by the College.

**II. UNIVERSITY FUNDED RESEARCH (include CUNY First account which is the funding source)**

Project Description (for RF Projects Indicate RF Acct.#)	Period	Organized Research (a)	Other Sponsored Activity (b)	Percent

**III. Instruction** \_\_\_\_\_

**IV. Departmental Administration** \_\_\_\_\_

**V. Other Institutional Activities** \_\_\_\_\_

**GRAND TOTAL** \_\_\_\_\_  
(must equal 100%)

\_\_\_\_\_  
Date

OR\*\*

\_\_\_\_\_  
Date

\_\_\_\_\_  
Faculty Member's Signature

\_\_\_\_\_  
Principal Investigator's Signature  
or other authorized signature

\*\* As per federal guidelines, the reports will be signed by the employee, principal investigator, or responsible official(s).

**Definition of Personnel Activity Report Categories**

I. Sponsored projects administered through the Research Foundation mean all research and other sponsored activities that are awarded by federal and non-federal agencies and organizations, separately budgeted and accounted for, and paid for by the sponsor. Programs that meet this criteria and are not administered through the RF would be included in Item II. PSC/CUNY research awards are included in the organized research category.

Mandatory Cost Sharing is required by the sponsor as a condition of obtaining an award.

Voluntarily Committed Cost Share means when an award is received in which voluntary cost share is proposed by the institution, the cost sharing becomes a binding commitment (voluntarily committed cost sharing) of the agreement, which the institution must provide and document, as part of the performance of the sponsored agreement. Voluntary Committed Cost Share must be approved by the V.C. for Research.

Effort in each project must be reported separately. Please note, the percentage of effort to be reported is the percentage in relation to your total semester work load. Overloads or work for which additional compensation is received are not to be included.

The Research Foundation project number should be included under Project Description in Item I. For Item II University Funded Research, the CUNY First department number should be included under Project Description.

a. Organized Research means effort expended on all research activities of an institution that are separately budgeted and accounted for.

b. Other Sponsored Activities mean effort expended on all programs and projects financed by federal and non-federal agencies and organizations which involve the performance of work other than instruction and organized research. Examples of such programs and projects are health service projects and community service programs. However, when any of these activities are undertaken by the institution without outside support, they may be classified as Other Institutional Activities.

II. University Funded Research means all effort expended on research and development activities that are separately budgeted and accounted for by the institution under an internal application of institutional funds. University Funded Research, for purposes of this document, shall be listed under the function of organized research. It includes research activities funded by the College's tax levy budget.

III. Instruction means the effort expended on teaching and training activities of an institution. Except for research training, this term includes all teaching and training activities, whether offered for credit toward a degree or certificate or on a non-credit basis, whether they are offered through regular academic departments of separate divisions, such as a summer school division or an extension division. Also considered part of this major function are Departmental Research and, where agreed to, University Funded Research.

IV. Departmental Administration means personnel service expenses incurred for administrative and supporting services that benefit common or joint departmental activities or objectives in academic dean's offices, departments and divisions.

V. Other Institutional Activities mean effort expended on all activities of an institution except: Instruction, Organized Research and Other Sponsored Activities, as defined above.

Figure 28

Appointments Detail				
Employee Name: AARONS, LESLIE				
Project	Effort%	Salary	PI	Certified
40H62-00 01	50.00%	\$9,000.00	Lane, Penny	<span style="color: red;">✗</span>
40H62-01 01	50.00%	\$9,000.00	Montano, Louis	<span style="color: red;">✗</span>

Figure 29

Terms and Conditions
<p>I, David Crouse, certify based on my personal knowledge or suitable means of verification, that the percentages in the Effort on My Projects column are reasonable in relation to the work performed for all individuals whose effort I have certified.</p>
<p style="text-align: right;"> <a href="#">Agree</a> <a href="#">Decline</a> </p>

Figure 30

## Reports

To access the Reports section from the Homepage, click on either the name on the **Main Dashboard** or the **Icon 1**. The Reports window will open as seen in figure 32 below.

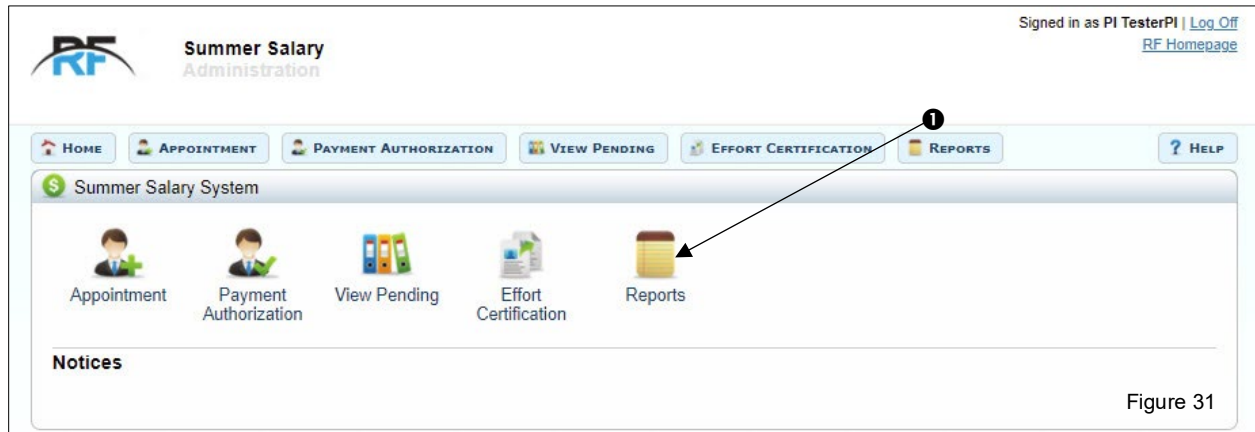


Figure 31

You now have several Reports to choose from. Click on the Report icon you wish to run.

**Please Note:** The selection of reports available to you is determined by your role in the organization.

After clicking on the Report icon, a new window will appear as seen in figure 32 below. For this example, we are selecting the **Payment Authorization Detail 2** report.



Figure 32

## **Report Descriptions**

### **Payroll Detail or Summary**

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

### **Remaining Encumbrance Detail & 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.

### **Grants Officer Payroll**

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

### **Payment History**

All college payroll data for use of CUNY payroll department.

### **Finance Certification**

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

### **Effort Certification Total**

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.

### **Summer Salary Budget Available**

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.

Choose the **Summer Salary Year 1** you wish to run the report for. For this example, we are choosing the year 2021. Each user is limited to viewing only their own projects. Choose the **Report Type** with the drop-down arrow menu **2**. Then click on **Show Report 3**. After clicking on Show Report, a **Summer Salary 2021 Report Type 4** window will appear as seen in figure 34 below.

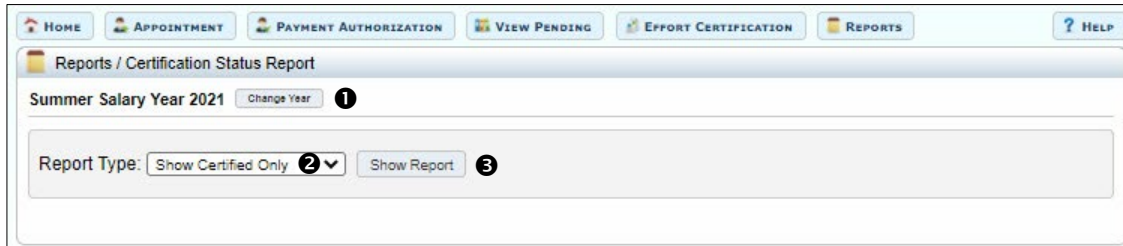
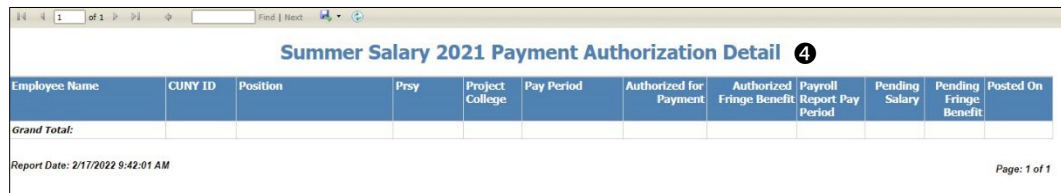


Figure 33

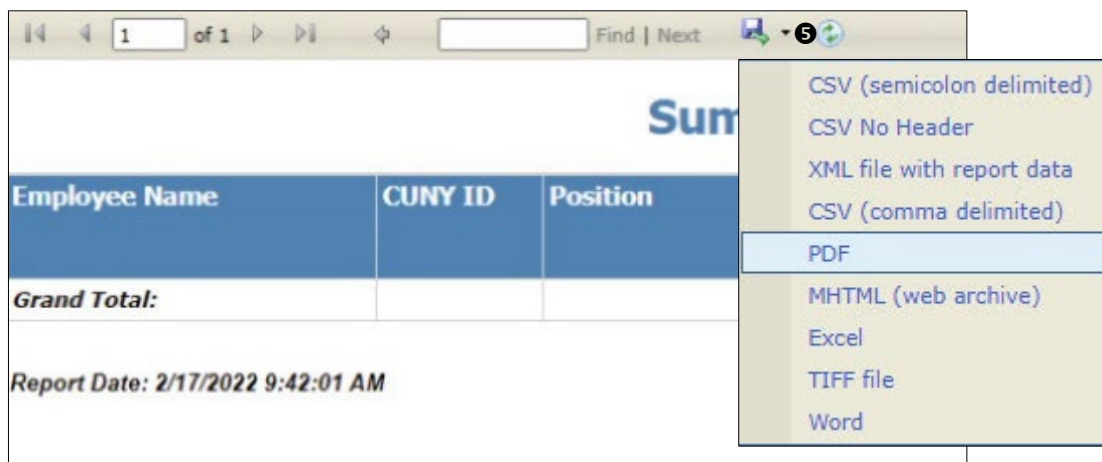
Once the Report is open, you have several ways to save the Report by clicking on the **arrow 5** next to the save icon. A drop-down box will appear as seen in figure 34 below. Once the Report is saved, you may then print it.



Employee Name	CUNY ID	Position	Prsy	Project College	Pay Period	Authorized for Payment	Authorized Fringe Benefit	Payroll Report Pay Period	Pending Salary	Pending Fringe Benefit	Posted On
<b>Grand Total:</b>											

Report Date: 2/17/2022 9:42:01 AM

Figure 34



Employee Name	CUNY ID	Position
<b>Grand Total:</b>		

Report Date: 2/17/2022 9:42:01 AM

- CSV (semicolon delimited)
- CSV No Header
- XML file with report data
- CSV (comma delimited)
- PDF**
- MHTML (web archive)
- Excel
- TIFF file
- Word

## **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](mailto: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.