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OneRF: Frequently Asked Questions

Last Updated: March 18, 2026

This document contains frequently asked questions related to OneRF (powered by Workday) the Research Foundation of the City University of New York (RFCUNY)'s evolution and unification of its grants management, finance, procurement, and human resources functions. It is based on questions RFCUNY has received since the launch of OneRF's Human Capital Management functionality on December 15, 2025.

For additional information about OneRF, please visit our OneRF Information Hub.

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General OneRF Questions

Who should I contact about an issue in OneRF?

The best way to get questions answered is to use OneRF's Workday platform. There, please use the Case Management function by searching for "Create Case". This will ensure that your questions go directly to the correct subject matter experts within RFCUNY.

What was communicated before the launch of OneRF and what was offered after the launch of the system? What can I access now to understand the changes?

One of RFCUNY's top priorities since the launch has been to orient Grants Officers (GOs), Principal Investigators (PIs), and other partners to our new system.

Prior to the launch of OneRF, RFCUNY conducted users testing, demonstrations, and communications including:

- A broad-scale communications campaign while development was occurring, with emails to GOs, PIs, RFCUNY field staff, and CUNY office administrators on topics including preparing for the launch, cutover deadlines, and key changes to expect.
- In-person and online demonstrations of the OneRF tools to grants officers, faculty, and our Workday advisory committee.
- A full cycle of User Acceptance Testing, including payroll parallel runs and end-to-end business process testing.

The OneRF Information Hub provides links to these resources as well as extensive support documents including FAQs, job aids, and demonstration videos and the full list of our communications in the Communications Archive on.

Since the launch of OneRF, we have held a robust series of webinars and office hours for GOs and PIs, as well as providing materials and prioritized support including:

- Over **100 detailed job aids** that walk users step-by-step through key processes in OneRF.
- A series of **OneRF 101 Webinars and Office Hours** focused on priority workflows for PIs and Grants Officers, with recordings available on the OneRF Information Hub.

- **Case Management support within OneRF** for individualized questions on specific transactions which are routed to subject matter experts.

While OneRF represents a significant shift from prior systems, our priorities remain unchanged: ensuring accurate and timely pay, maintaining compliance, and supporting effective grant management. We acknowledge that any transition of this scale involves a learning curve, and we will continue to communicate updates, fixes, and new functionality through the OneRF Information Hub and targeted outreach. Your feedback remains essential to improving both the system and the support around it.

How were workflow structures and approval hierarchies for key business processes designed in OneRF?

As RFCUNY's core financial and HR system, OneRF contains more data than our legacy systems and we've configured it with compliance and transparency in mind.

During our design and configuration phases, we intentionally structured OneRF business processes to align as closely as possible with legacy workflows and approval hierarchies. Where deviations occur, they are driven primarily by one of two critical issues:

1) Compliance requirements — particularly those related to grants management, internal controls, and audit standards.
2) Workday's hard-coded framework for system-based controls.

With this in mind, we migrated field roles from our legacy systems to OneRF to provide the baseline level of access necessary to conduct essential transactions within the platform. We intend to refine and adjust these roles and will work with CUNY Grants Officers to pinpoint business processes they require access to, including visibility for tracking purposes.

Is there an audit trail in OneRF? This was a core feature in the legacy system.

Yes. Audit trails also exist in OneRF and RFCUNY will be providing guidance to users on how to access them and review them. Additionally, we are confident that when OneRF's powerful reporting tools - including custom reports and dashboards – are fully launched later this spring, they will address our users' information, audit compliance, completion timeline, and status request needs.

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How is RFCUNY working to improve user access to key business processes?

While RFCUNY has worked with Grants Officers and other CUNY stakeholders since the launch of OneRF to ensure that GOs have the permissions, roles, and access necessary to do their jobs, there is still more to be done.

This work has primarily focused on aligning the user roles in OneRF to reflect day-to-day duties and responsibilities. This is complex work as each CUNY campus has a different set of requirements and GO responsibilities. We began by migrating the permissions, roles, and role assignments for field roles (PI, Authorized Signatory, Grant Officer, Timekeeper) from the legacy system to OneRF, establishing a baseline that mirrors legacy access. Based on the feedback from the field this was largely successful and we have processed thousands of successful transactions since the launch.

While we built the roles to have the general access we believe they need in OneRF, we are continuing to refine the roles and access to facilitate work. A working group within RFCUNY is in place with a charge to focus on access, roles, and authority. We will introduce refinements and, where appropriate, additional roles to support more specialized access needs (such as reporting).

It is important to note that the process of adding individuals or roles to grants remains unchanged and continues to be managed through RFCUNY's Grants & Contracts (G&C) team. Additionally, certain access considerations are influenced by formal or informal campus organizational structures, and we are committed to refining access within applicable compliance requirements.

I have questions about my level of administrative access. Can I review the access I have in OneRF?

The process for ad hoc role additions to grants remains unchanged and continues to be managed through RFCUNY's Grants & Contracts (G&C) team. We then work with CUNY Grants Officers to ensure that, wherever possible, we expand administrative access to the other transactions and processes users may need within OneRF. It is important to note that certain access considerations are influenced by formal or informal campus organizational structures, but we are committed to expanding GO access within applicable compliance requirements.

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As this work continues, many users have reported success in using OneRF's temporary delegation features. If it is helpful, we have provided more information on this process in our recorded webinar on delegations: https://www.youtube.com/watch?v=NUN1oD3COgk.

How has RFCUNY communicated regarding issues involving payroll and vendor processing?

RFCUNY's priority is to ensure that all users have the information they need to do their work and that they are paid for that work, full stop. The payroll and vendor payment disruptions that occurred immediately after the launch of OneRF stemmed from a combination of factors that have been - and will continue to be - addressed with the highest priority. We have continued to communicate with Grants Officers and Principal Investigators since the launch of OneRF and are prioritizing these issues in our case management system.

Should RFCUNY employees use work hours for OneRF training?

Yes. As with any other software or tool required for an employee to do their work, RFCUNY employees should complete any OneRF training – including reviewing Job Aids or attending Webinars - during their regular work hours.

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How can Grants Officers view what the actual pay rate is for a full-time employee, including salary information allocated for each appointment?

Grants Officers can see employee pay rates and associated obligations in OneRF, even when appointments cover only part of the year, in the **Compensation** area of OneRF and can now see obligations for this compensation using the **RFCUNY Grant Budget and Expense Report**.

In OneRF, personnel commitments and obligations are calculated based on the weekly hours the employee is scheduled to work, similar to the calculation options that existed in the legacy system. Within the OneRF system, the following methods are used:

1) **Hourly employees –** these employees will require an hourly rate of pay. To calculate the hours per pay period, multiply the hourly rate by the estimated hours worked in a pay period.
2) **Salaried employees** will require an annual salary. To calculate an employee's annual salary, multiply their biweekly pay rate by 26.

CUNY Grants Officers can view and access the pay rate for each employee by navigating to the employee's profile under the **Compensation** section in OneRF. The employee's pay history appears under **Pay Change History**. If an employee has multiple positions, the compensation for each position is viewable by toggling between the positions.

The estimated obligations (encumbrances) for employees are available in the Reporting section. The method to review these obligations using the **RFCUNY Grant Budget and Expense Report** is outlined in the General Grants and Contracts section.

For employees with multiple appointments, how can I process the end of one appointment to avoid their termination on all other projects?

When OneRF launched, RFCUNY quickly identified an issue where individuals with multiple appointments were being terminated from all positions in the OneRF system if the primary position had an end date in the past. This issue has been resolved.

When processing an employee who has left an appointment, it is important to note that in OneRF, a "Termination" means a full separation from the organization. It will result in the individual no longer being able to submit timesheets or take other actions within OneRF.

If a worker has multiple positions, the "End Job" action must be taken when one or more (but not all) of those positions come to an end.

In other words, as general guidance for future work, a termination should be processed only when the worker is fully separating from the organization.

How are cases involving issues or questions regarding payroll processing handled in OneRF?

The Case Management tool within OneRF allows users to submit a ticket that routes directly to the appropriate expert group, and users can track responses and updates there. In order to address the most urgent issues, the RFCUNY team reviews and responds to cases in OneRF based on severity and business impact.

Urgent payroll, vendor payment, and operational disruptions are escalated immediately. Lower-severity items are addressed in the order they are received and more complex issues may require additional analysis, configuration review, or coordination with our vendors before a substantive response can be provided.

I'm confused when reading my pay slip in OneRF, what's the best way to review it?

You can review your pay information by searching for "My Payslips" in OneRF. On that page, you can review your most current and historical pay slips. We know that the format of this information in OneRF is different than what you might have seen in RFCUNY's legacy E-Pay system. For a more familiar view, you can click on "Print Payslip Image". The OneRF system will generate a PDF that more closely resembles those generated by the legacy E-Pay system. Please note that the PDF does not appear immediately – the system typically needs a minute or two to process the request. Once it is done, the PDF will appear on screen and a link to the document will also be sent to your email inbox.

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Human Resources: Onboarding and Job Extension Questions

How can I learn the required steps and approvals necessary to fully onboard a new employee?

The onboarding process is different in OneRF and the RFCUNY HR team has developed a range of materials to support these changes. This has included:

- A comprehensive Onboarding Job Aid outlining each step and approval in the process, available **here**.
- Detailed webinars including the recorded session available for viewing here: https://www.youtube.com/watch?v=nekgSTFki14.

The RFCUNY human resources team will continue to provide opportunities for support and further office hours in the coming weeks and will announce additional sessions as they are scheduled.

How are extensions on appointments handled in OneRF?

The process to modify jobs has changed with OneRF and the new process requires that extensions submitted through the Job Change process have all approval steps completed before the employee can continue submitting time. This is a change and if approvals are delayed or routed incorrectly, it will block timesheet submission. While the Worker History tab does display transactions that are "In Progress" and indicate who the item is awaiting, it requires reviewing each worker individually. RFCUNY is exploring reporting options that could provide a more centralized supervisory organization-level perspective.

System-wide issues with submitting timesheets, setting up schedules, and requesting leave have been resolved. If any individual is in a situation where they are missing pay, submitting a case in OneRF with their name and pay period will trigger immediate review and correction.

How can I ensure that onboarding does not get stuck in a situation where employees cannot submit timesheets?

While an offer may appear complete in the process history, the worker (employee) cannot be activated until all downstream compliance and approval steps are finalized. Specifically, after offer completion, the process requires:

1. Background Check review and

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2. Completion of the "Ready for Hire" step.

These steps route to the Supervisory Organization (Manager). While the Supervisory Org Manager does not have an impact on timesheet approval functions, onboarding actions for new RFCUNY staff do flow up to the designated supervisory org manager. If the hire is not being acted upon in a timely manner by the designated supervisory organization manager, RFCUNY's Human Resources team can take action to move the application forward. Hiring managers can reach out to their Campus Personnel Coordinator at RFCUNY to move these forward.

Can CUNY Grants Officers complete the onboarding process, or do they need support from RFCUNY central office staff?

RFCUNY is pleased to confirm that RFCUNY's settings for the Grants Officer role allow them to take all the necessary steps required to complete the onboarding process. For example, Grants Officers can currently Create Positions, Job Requisitions, Prospects, Job Applications, and complete the Hiring task. If an individual GO is unable to access these roles, or if there are functions outside this list that are preventing them from completing this work, they can contact us. Submitting a case helps our team see the details quickly and intervene directly.

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Human Resources: Timesheets and Absence Questions

How has RFCUNY addressed pay discrepancies in employee tax withholding?

RFCUNY's top priority is to ensure that every employee receives pay for the hours they work. Our Human Resources team addresses issues on pay discrepancies on an individual, global, and ongoing basis. Specifically:

- An early issue regarding tax withholding was resolved. Employees can review their pay slips and withholding elections directly in OneRF's Workday platform at any time. If any individual believes their withholding is inaccurate, they should submit a case in OneRF and our HR team will review it as quickly as possible.
- Retroactive pay issues can still be corrected; submitting a case in OneRF with the employee's name and missing pay periods will allow our HR team to prioritize and resolve payment immediately.

Our work to address timesheets and pay has also included:

- Running supplemental payrolls on an ongoing basis to ensure employees with timesheet issues get paid in a timely manner (https://www.rfcuny.org/rfwebsite/media/llln4k0n/hr-01-23-26-memorandum-on-supplemental-payroll.pdf),
- Providing demonstration videos on how to submit and approve timesheets (https://www.rfcuny.org/rfwebsite/media/kjwldnoi/hr-12-12-25-memorandum-on-demonstration-videos.pdf),
- Providing webinars on Time and Leave for Grants Officers (https://www.youtube.com/watch?v=7unrGumW3CE) and Principal Investigators (https://youtu.be/mbio9D8gV8I).

GOs and PIs can correct pay issues by submitting a case in OneRF with the employee's name and missing pay periods. RFCUNY's Human Resources team is prepared and prioritizing these cases.

For individuals working on multiple appointments, how can they, and their supervisors, ensure correct effort reporting and allocation of hours to the correct timesheet across all grants they are appointed on?

In OneRF's Workday platform, an employee's schedule is tied to the worker record, not to individual grants. For employees appointed on multiple grants under different PIs, one PI does not automatically have visibility into commitments tied to other supervisory organizations. We are evaluating reporting and dashboard options to provide clearer visibility into multi-position/multi-grant appointments.

For employees who are paid concurrently on more than one grant, we completed the data migration to match legacy data and created separate job appointments and obligations by grant. While this approach allowed us to match the legacy structure, it resulted in a lack of clarity between the separate appointments by grant. As a result, timesheets were submitted and paid on only one grant. RFCUNY has addressed this issue by:

- **In the short term:** we have added a position code to the position title as a unique identifier so employees with multiple appointments across different grants can allocate their timesheets accordingly. In addition, for payments already made, we will identify the correct allocation of such payments to the respective grants and process cost transfers,
- **In the longer term:** we recommend consolidating the multiple job assignments into one position and allocating cost using Costing Allocation business process.

There was an error in an employee's timesheets earlier this year. Can that be addressed on a retroactive basis?

Yes. Retroactive pay issues can still be corrected; submitting a case in OneRF with the employee's name and missing pay periods will allow our HR team to prioritize and resolve payment quickly.

RFCUNY's top priority is to ensure that every employee receives pay for the hours they worked. Our work to address timesheets and pay has included:

- Running supplemental payrolls on an ongoing basis to ensure employees with timesheet issues get paid in a timely manner (https://www.rfcuny.org/rfwebsite/media/llln4k0n/hr-01-23-26-memorandum-on-supplemental-payroll.pdf)

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- Providing demonstration videos on how to submit and approve timesheets (https://www.rfcuny.org/rfwebsite/media/kjwldnoi/hr-12-12-25-memorandum-on-demonstration-videos.pdf)
- Providing webinars on Time and Leave for Grants Officers (https://www.youtube.com/watch?v=7unrGumW3CE) and Principal Investigators (https://youtu.be/mbio9D8gV8I).

If an issue persists for a specific individual or transaction, submitting a OneRF case allows our team to review the exact record and respond quickly. Including names, grant ID, and the relevant dates/pay periods helps us resolve it faster. RFCUNY's Human Resources team is prioritizing all payroll matters and will address these issues immediately upon receiving the case.

Is there a way to generate a school-wide or PI-wide list of who has not submitted timesheets or who hasn't had their timesheet approved?

Yes. We are pleased to announce that RFCUNY's Payroll team has developed reports that will identify employees who have not submitted timesheets and employees whose timesheets are pending approval. These reports are now live on the dashboard for PIs and GOs in OneRF.

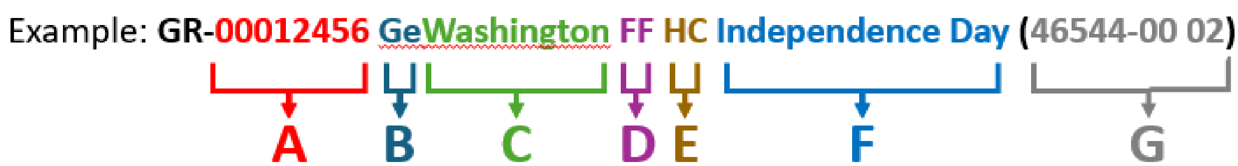
- **RFCUNY Timesheet Pending Submission** – A timesheet that has been created by the employee in the RFCUNY system but has *not yet been submitted* for approval.
- **RFCUNY Timesheet Pending Approval** – A timesheet that has been *submitted by the employee and is waiting for the Principal Investigator (PI) or supervisor to review and approve* before payroll processing.
- **RFCUNY Timesheet Uncreated** – A timesheet that *has not yet been created in the system by the employee for the applicable pay period,* meaning no hours have been entered.

Additionally, we will publish job aids explaining how to access these reports both through the dashboard and via the search field in OneRF.

Grants & Contracts: General and Reporting Questions

How can I identify a specific grant within OneRF?

RFCUNY worked during implementation to make it as easy as possible to find grants using the legacy project number within OneRF's Workday platform. **As a result, the Grant name in OneRF includes the Project Account number used in the legacy system:**



Definitions for the fields used in a Grant Number based on the example above:

- **A - Grant ID** (A unique identifier automatically assigned by OneRF)
- **B - Principal Investigator (PI) First Name**: (First two letters of first name)
- **C - Principal Investigator (PI) Last Name:** (Full last name)
- **D - Sponsor Type** (Will be FF: Federal, SS: State, CC: City or PP: Private)
- **E - College Abbreviation:** (e.g., HC = Hunter College).
- **F - Project Title: Title of the sponsored project**
- **G - Legacy Project Number** (Legacy Project Number, PRSY – Project Subaccount Year)

Employees can always find a Grant in OneRF, by searching for the legacy Project Account number. In other words, a search using legacy system project account number (for example: 40132-00 01) will always return the corresponding OneRF Grant ID and Name.

How can I track encumbrances relative to individual hires on a specific project in order to avoid overspending on the account?

Encumbrance data is available in OneRF through the Grant Budget & Expense Report, but it appears differently than in the legacy system and requires using the drill-down feature. This report displays all the commitments and obligations needed for personnel expenses. Encumbrances – now known in the OneRF system as "obligations" – are tied to specific workers.

In order to review the obligations (encumbrances) relative to individual hires on specific projects, users are able to use the drilldown on obligations to identify the obligations associated with a specific worker. This drilldown can be accessed by taking the following steps:

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1. Running the RFCUNY Grant Budget & Expense Report (search for "Grant Budget & Expense Report").
2. Locate the Salaries & Wages Posted Obligations on the report and click on the Posted Obligations amount. (You can do this from the Salaries & Wages summary line or from each individual Salary Expense Code.)
3. In the RFCUNY Grant Budget and Expense Report, the amounts displayed in blue are clickable and provide drill-down detail. Within the Posted Obligations column, selecting the blue amount in the Salary and Wages section opens a new window showing detailed amounts by employee.
4. You can then filter the drilldown by the employee (sorting by the "Employee as a Worktag" column) and this will retrieve all the posted obligations for this worker.
5. This data can also be extracted to Microsoft Excel for sorting and summarizing amounts by employee.

Commitments and obligations are in place to minimize the risk of overspending on the account. In OneRF, obligation amounts are established separately for each pay period. At any given time, a worker's remaining total obligation represents the sum of the obligation amounts for all future pay periods.

RFCUNY has developed further information on reporting including a recorded webinar available at https://youtu.be/yBjs8A3ecIU.

How can I get expenditure data from OneRF Grant Reports?

The **Grant Budget and Expense Report** in OneRF provides complete budget, obligations, and expenditure amounts. Users can review expenditures on a grant by taking the following steps:

1) Run the report for the desired grant, and the Actual columns will show the expenditures on each budget line.
2) The report will show both personnel and OTPS expenditures.
3) From this view, you can drill down on the actuals to get more details, such as employee or supplier information.

If a more detailed walkthrough of this report would be helpful, you can review our recorded webinar at https://www.youtube.com/watch?v=q4oAa--9dkU.

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What Grant Reports are available? Are there other reports that will allow campus to access the same data they had in the legacy tools?

RFCUNY has released the first set of core reports and is testing additional campus-level and summary reports for near-term release. We know that reporting is a top issue for Grants Officers and Principal Investigators and RFCUNY has been working since the launch of OneRF to develop reports that address the top needs of staff, Grants Officers, and Principal Investigators.

The first set of reports, which have been released on OneRF are:

1. **Consolidated (Award) Trial Balance Report** (available to GOs & PIs)
2. **Grants Payroll Actuals - Summary Report** (available to GOs & PIs)
3. **Grants Payroll Obligations - Summary Report** (available to GOs & PIs)
4. **Index by Sponsor ID (Cost Center)** (available to GOs)
5. **PI Project List** (available to PIs)
6. **RFCUNY Grant Budget & Expense Report** (available to GOs & PIs)
7. **RFCUNY Grant Trial Balance Report** (available to GOs & PIs)
8. **Summary of Sponsored Projects for the PI** (available to PIs)
9. **View All My Grants** (available to PIs)

The second set, which we are currently completing and beginning to conduct internal testing on, includes the following reports:

1. **Administrative Fee by College** (Cost Center) (available to GOs)
2. **Deficit Cash Balance by College** (available to GOs)
3. **Direct/Facilities & Administrative Cost** (available to GOs)
4. **F&A Cost Recovery by College** (Cost Center) (available to GOs)
5. **Grant Cumulative Budget & Expense Report** (available to GOs & PIs)
6. **Index by College (Cost Center)** (available to GOs)
7. **PI Grants Pending Purchase Orders** (available to PIs)
8. **Statement of Changes in Recoveries Funds and Interest Distribution** (available to GOs)
9. **Summary of Sponsored Projects by College (Cost Center)** (available to GOs)

As soon as testing on the second set of reports is complete, we will launch them in OneRF and announce their availability to the field.

RFCUNY understands that there is significant desire for additional custom reporting and we are assembling a working group with the responsibility of developing additional reporting capabilities. We will publish an update on the OneRF Information Hub with further information.

Procurement and Payables Questions

Are there any issues with PhD students receiving stipends?

System-wide, stipend payments are resolved. If a student is still missing payment, submitting a case in OneRF allows our team to review the exact record and respond quickly. Including names, grant ID, and the relevant dates and pay periods helps us resolve it faster.

With OneRF, we have moved to a centralized system and repository that puts all the information in one place and should facilitate all payments and amendments being housed in one authoritative database moving forward.

RFCUNY has created a range of materials to help users understand the new processes and the steps necessary to ensure that graduate students are paid their stipends. These include:

- A recorded webinar for PIs on stipends (https://www.youtube.com/watch?v=5hPiNjZRHIo&feature=youtu.be)
- Job aids that cover transactions related to submitting stipend requests (https://www.rfcuny.org/rfwebsite/training/training-resources/#ProcurementandPayables-ForthePI)

Please note that stipends are not the only way that students receive payments from RFCUNY. Students can also be compensated for work via payroll. We held a webinar for graduate students with our Human Resources team on Friday, February 6, 2026.

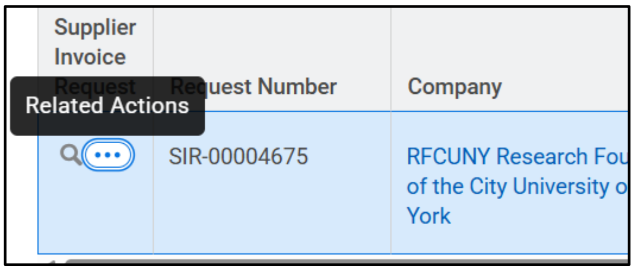
Will authorized signatories have access to the "Find Payments" function in order to see if, when, and how an invoice or reimbursement has been paid similar to the views in the legacy system?

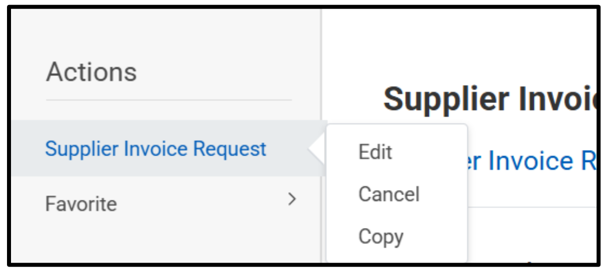
We understand that the ability to review payments is important, particularly for GOs and authorized signatories. We are developing a report that will allow full access to this information. That report is currently being tested, and we will announce its availability as soon as the testing is complete.

How can I recall or edit an invoice after I have submitted it for approval?

We understand that there is no specific function that is named "recall" for an invoice in OneRF. However, supplier invoice requests can be edited and canceled after submission. A brief overview of this process is:

- From **My Supplier Invoice Requests** in OneRF, click on the magnifying glass in the leftmost column for the invoice you want to edit. Three dots will appear.
- Click on the three dots to open a **Related Actions** screen.
- In the **Related Actions** screen, clicking on "**Supplier Invoice Request**" will reveal the available options for your invoice.





As the screenshot shows, from here users can **edit**, **cancel**, or **copy** the supplier invoice request. For more information on this topic, please reach out for help by submitting a case in OneRF.

How can I see the reason why an invoice was denied?

We understand seeing the reason for a denial is important and there is a way to review this information in OneRF. To view the supplier invoice request that you submitted please use **My Supplier Invoice Requests** report. To view why the request was denied, please click on the magnifying glass under **Supplier Invoice Request** column. Then click on the process history tab and scroll down to the bottom to view who denied the request and why.

Why does the nomenclature on SIRs and SINVs seem inconsistent?

Transaction numbers are generated system-wide in OneRF's Workday platform and they cannot be customized or changed.

Will there be a report in OneRF that will allow me to see invoice queue on a team-wide basis? Or one that will allow me to see all SIRs or SINVs for a group of grants, or a team?

RFCUNY is actively working to develop and recreate all the reports that existed in the legacy system. Initial efforts prioritized the reports most frequently used by Grants Officers and Principal Investigators. Development of additional legacy-equivalent and new reports is ongoing, and once the full suite of reports is rolled out, the field will have full visibility into the status of supplier invoices.

What is the expected turnaround time of these invoices being assigned SINVs and in what order are they processed?

RFCUNY's P&P team has been continuously processing invoices since the launch of OneRF on January 5, 2026. Invoices are processed in the order they are received, however processing times can vary depending on a range of factors outside RFCUNY's control.

The process for purchase orders seems to have changed significantly. Why is that?

The purchase order and payment process in OneRF has changed and is more structured than in our legacy system. It is important to note that this is an intentional part of the OneRF system framework, that should result in greater transparency and smoother transactions once users are comfortable with the process.

When a transaction remains open (for example, a receipt associated with a specific PO), in most cases, it means that the users still need to take a required workflow step, which is still pending completion. Put a different way, OneRF has been configured to send notifications when user action is required (e.g., receipt confirmation, approval, or other workflow steps) to prevent transactions from stalling.

If specific transactions appear stalled despite required steps being completed, the first step should be to review the notifications menu to see what step is required. It's important to note that while we are still in the process of transition, OneRF's Workday platform has been used successfully for procurement by hundreds of organizations, and it's been designed with compliance and transparency in mind. Workday has built procurement workflows to meet the general best procurement and accounting practices, as well as the unique compliance standards and requirements of RFCUNY as a fiscal agent.

Why did OneRF change the relationship PIs and college representatives have maintained with vendors?

RFCUNY has been careful to ensure that every functional area of OneRF received dedicated design, configuration, and testing focus through the implementation process.

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This new system is not meant to replace long-valued professional relationships. Instead, routing purchases through OneRF eliminates the need for PIs to manage invoices – a significant administrative burden in our legacy systems - by automatically matching with POs and receipts in OneRF. This not only minimizes downstream reconciliations and validations, but also strengthens compliance and internal controls.

The transition from our legacy systems to OneRF involved a historically massive data migration, including open Purchase Orders and Suppliers. Specifically, the supplier migration to OneRF was a lengthy process, often involving significant manual intervention. The RFCUNY P&P team continues to work on onboarding as many suppliers as possible.

Looking forward, OneRF's Jaggaer platform provides users with additional convenient procurement options including a catalog punch-out procurement path and invoices against Purchase Orders submitted into the system by suppliers, which will, again, spare PIs the administrative burden associated with invoice submission. PIs only need to confirm receipt of goods or services, which we are confident that, after the initial learning and adjustment period, will provide a better, smoother procurement experience for the field.

What is the "Supplier Questionnaire" and who does RFCUNY send it to?

The supplier questionnaire is part of the standardized onboarding process for OneRF's Workday platform. It ensures that information on tax, banking, and compliance is collected securely and directly from the vendor. This, in turn, reduces errors and protects sensitive data. Specifically, it means that PIs and GOs no longer have to see or touch sensitive, private information – a pain point on RFCUNY's legacy systems. While this may differ from past practices, it strengthens auditability and helps prevent payment delays caused by incomplete or incorrect vendor information. A copy of the Supplier Invoice Questionnaire is available through the "How A Supplier Completes the Registration Process" Job Aid located in the OneRF Training Resource page: RF CUNY - Training Resources.

How does OneRF prevent incorrect charges from appearing on grants?

Although users may see grants they do not control during search, OneRF has multiple safeguards - including PI and central office review - that prevent incorrect charges from being finalized.

We can confirm that if an individual attempts to submit an invoice on a grant that they do not control, the OneRF system has multiple steps that catch it. Because of how some

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grants are configured, these catches are after submission and during the routing and approval process as outlined below.

When initiating procurement transactions against a grant, we recommend searching for the grant by typing the grant number instead of scrolling through the list of grants. If a user does select a grant that they do not have a role on, there are multiple fail-safes in place to prevent the improper routing and approval of this expense:

1) The first warning is a message that appears on screen alerting the user that they are submitting expenses to a grant they do not control.
2) If a user decides to proceed, the transaction will then route to the PI who oversees that grant for review. If the transaction was sent to the incorrect grant, the PI can reject it immediately.
3) If the PI accidentally approves an incorrect transaction, it will route to Research Foundation Central Office (RFCO) staff for processing, where there is an additional opportunity to reject it.

Some procurement transactions do need to route to multiple grants and multiple PIs. For this reason, we have added blockers on the routing and approval path rather than earlier in the submission process. As noted above, we have also added a warning message to alert the user of potential discrepancies. It is important to note that every transaction is always routed to the PI for their review and approval before they are finalized.