

RED Grant Payroll Certification Process Pre-Reviewer Manual



Version	Date	Author	Notes
1.0	11/08/2018	Vonda Lee	Document Creation
2.0	02/04/2019	Vonda Lee	Added how to view your document in Perceptive Content
2.1	02/19/2019	Vonda Lee	Added reporting information.



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Using Any Browser To Pre-Review A Grant Payroll Certification Form (PCF)

An email will be sent to the *Pre-Reviewer* with a link to the Grant Payroll Certification Form before the Principal Investigator certifies, as shown below:

ImageNow He	lp <imagenowhelp@uncc.edu< th=""></imagenowhelp@uncc.edu<>
Annual Grant Payroll Certification 1 message	1
gca-payroll-cert@uncc.edu <gca-payroll-cert@uncc.edu> To: jshave12@uncc.edu Boc: imagenowhei@guncc.edu</gca-payroll-cert@uncc.edu>	Wed, Nov 7, 2018 at 8:28 AM
Robin Moose,	i
You have been identified as a Pre-Reviewer for Sponsored Account Project Number 556379, Interconnection of Premise Energy.	
Fiscal Year 2018 ends June 30, 2018. The salaries associated with this project must be certified annualy to maintain research compliance with the agency sponsoring this project and University polic	iy.
The first step is for you to pre-review the salaries charged to Fund Number 560379, then submit the form for final annual certification by the Primary Investigator, Madhav Manjrekar.	
Please use https://testimaging.uncc.edu/imagenowforms/fs?form=Payroll_Certification_Form&certType=Annual&grntTok=VGxSVk1rMTZZeIU9 to access the Payroll Certification form for pre-review. Manjrekar to complete the certification (including your pre-review) is six (6) weeks from today.	The deadline for Madhav
Thank you,	1
Grants and Contracts Administration	,
	1

Note: You have three (3) weeks to certify the grant/project's payroll. Three (3) days after you receive the first notice, you will get daily reminders every five (5) days until you complete the certification. See <u>Appendix A</u> for reminder email text.

- 1. Click the link in the email.
- 2. The University Web Authentication login screen will display in the browser, as shown below. Enter your NinerNET credentials and press the *LOG IN* button.





3. After you log in, the Grant Payroll Certification Form is displayed:

UNC CH	ARLOTTE	Research and Economic Dev Psyroll Certification	elopment					
Hide Instr Form instructi Form instructi	ructions ions for the Pre-Re ions for the Princip	wiewer olick here.						
Form instructions for the Philopa Investigator click nete.								
Pre-Reviewer ID: 800550129 Lee, Melvina								
Grant Details								
Proj	ect Number:	556016						
1	Project Title:	A double blind, randomized, placebo or	ontrolled, para	allel group study tp sin	nultaneously qualify a bio	omarker algorith		
Principal I	Investigator:	George Demakis						
Projec	t Start Date:	08/01/2013		Project End Date:	11/10/2019			
Reporting	o Start Date:	07/01/2017	Re	norting End Date:	06/30/2018			
Fund 560016	Employee II 800896685	Employee Name Sydney Park	Role RA - Graduate Assistantship	Salary \$5,167.98	Amount	CS Fund	CS Acct	٠
Pre-Reviewer Comments	r Comments are for information	al purposes only. Any changes or correction	Total:	\$5,167.98 quire action of your de	partment Research Admi	nistrator and/or GCA.		
By checking this box and submitting this form, the Payroll Certification has been successfully Pre Reviewed. If you have questions or concerns that prohibit you from submitting, please contact GCA at GCA-payroll-cert@uncc.edu								
			Submit	Reset Attachments				

Note: If you have already previewed and submitted the PCF, see <u>Appendix B</u> for details.

5. Click the *Hide Instructions* or *Show Instructions* or *Show Instructions*

buttons to hide or show the instructions.

6. The *Pre-Reviewer ID* (800#) and *Name* will automatically display.



7. In the *Payroll Detail* section, only grant funds for the project will display and you can click on a detail line to review the payroll history for the selected employee, as shown below:

UNC CHARLOTTE	Grant Payroll Certification									
Hide Instructions										
Form instructions for the Pre-Reviewer click here.										
r unn inserueruns for ere rinnuper investigatur Click here.										
Pre-Reviewer ID: 800550129 Lee, Melvina										
Grant Details:										
Project Number:	553384									
Project Title:	Task Order 1-3C Technolog	y Transfer of Concrete F	Pavement Technologies	-Year 4 & 5						
Principal Investigator:	Tara Cavalline									
Project Start Date:	09/12/2015		Project End Date:	06/13/2018						
Reporting Start Date:	07/01/2017	R	eporting End Date:	06/30/2018						
ayroll Detail										
		Payroll Detail fo Fund:	r Tara Cavalline, 80043 101516, IFLX COE	1195						
Position	Description	Account	Pay Period S	itart Pay Perio	d End Gross Amount					
ESPE45	Curriculum Dev in Summer	911300	16-MAY-201	18 31-MAY-2	2018 \$500.00					
ESPE45 ESPE45	Curriculum Dev in Summer Curriculum Dev in Summer	911300 911300	16-MAY-20 01-JUN-201	18 31-MAY- 18 15-JUN-2	2018 \$500.00 2018 \$500.00					
ESPE45 ESPE45 BACK	Curriculum Dev in Summer Curriculum Dev in Summer	911300 911300	16-MAY-201	18 31-MAY-3 18 15-JUN-3	2018 \$500.00 2018 \$500.00 Total: \$1,000.00					
ESPE45 ESPE45 BAOK	Curriculum Dev in Summer Curriculum Dev in Summer	911300 911300 Payroll Detail fo Eurod: 101530	16-MAY-20 01-JUN-20 r Tara Cavailine, 80043 Engineering Technolo	18 31-MAY-: 18 15-JUN-: 1195	2018 \$500.00 2018 \$500.00 Total: \$1,000.00					
ESPE45 ESPE45 BACK Position	Curriculum Dev in Summer Curriculum Dev in Summer Description	911300 911300 Payroli Detail fo Fund: 101530, Account	16-MAY-20 01-JUN-20 r Tara Cavalline, 80043 Engineering Technolo Pay Period Start	18 31-MAY-3 18 15-JUN-3 1195 99 Pay Period E	2018 \$500.00 2018 \$500.00 Total: \$1,000.00					
ESPE45 ESPE45 BACK Position 004552	Curriculum Dev in Summer Curriculum Dev in Summer Description Assistant Professor	911300 911300 Payroll Detail fo Fund: 101530, Account 913100	16-MAY-20 01-JUN-20 r Tara Cavalline, 80043 Engineering Technolo Pay Period Start 01-JUL-2017	18 31-MAY-3 18 15-JUN-3 1195 199 Pay Period El 15-JUL-2013	2018 \$500.00 2018 \$500.00 Total: \$1,000.00 nd Gross Amount 7 \$3,975.33					
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ESPE45 ESPE45 BACK Position 004552 004552 004552 004552 004552 004552 004552 004552 004552	Curriculum Dev in Summer Curriculum Dev in Summer Description Assistant Professor Assistant Professor	911300 911300 Payroll Detail fo Fund: 101530, Account 913100 913100 913100 913100 913100 913100 913100 913100 913100	16-MAY-20 01-JUN-20 Tara Cavalline, 8043 Engineering Technolo Pay Period Start 01-JUL-2017 16-JUL-2017 01-AUG-2017 16-AUG-2017 16-AUG-2017 01-SEP-2017 16-SEP-2017 16-SEP-2017 16-SEP-2017 16-SEP-2017 01-OCT-2017	18 31-MAY-3 18 15-JUN-3 1195 Pay Period Ei 15-JUL-2011 31-JUL-2011 31-JUL-2011 31-AUG-2011 31-AUG-2011 31-AUG-2011 31-AUG-2011 31-AUG-2011 31-AUG-2011 31-AUG-2011 30-SEP-2011 30-SEP-2011 30-SEP-2011 30-SEP-2011 30-SEP-2011 15-OCT-2011	S500.00 2018 \$500.00 Total: \$1,000.00 Total: \$1,000.00 nd Gross Amount r \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,975.33 7 \$3,976.33 7 \$3,976.33 7 \$3,976.33 7 \$3,976.33 7 \$3,976.33 7 \$3,976.33 7 \$3,976.33 7 \$3,976.33 7 \$3,976.33 7					

Note: Payroll history for all funds will display for selected employee.

8. Click the **Back** b

button to return to the previous screen.



- 9. If applicable, enter **Cost Share Amount/Fund/Account** combination.
 - a. Enter a Cost Share (CS) Amount value.
 - b. Enter a valid **CS Fund** number. Once you begin to type, a list will display for you to select the appropriate fund number as shown below:

CS Fund	
115	
830115	
115602	
 115605	
115610	
111501	
 111533	

c. Enter a valid **CS Acct** number. Once you begin to type, a list will display for you to select the appropriate account number as shown below:

	CS Acct	
	100	Ţ
	G22100	4
	921100	
	147100	-{
	G12100	1
	G17100	-
	103100	1
L	922100	ا کت

Note: Cost Share information should be entered using non-grant funds only.

10. To add an additional line, click the **Add Line** button. You can also remove

any **Cost Share** line by clicking the **Remove Line** button.

11. Enter any additional information in the **Pre-Reviewer Comments** section.

Note: Comments are for information only. Any changes or corrections to payroll require action by your department Research Administrator and/or GCA.

- 12. If applicable, click the *Attachments* button to attach any supporting documentation.
- 13. Click the checkbox to acknowledge the payroll certification has been successfully reviewed.

Research & Economic Development (RED) Grant Payroll Certification Pre-Reviewer Manual 6



14. Click the *Submit* button to submit the form; a confirmation screen will be displayed as shown below:

UNC CHARLOTTE Research and Economic Development	
Hide Instructions Form instructions for the Pre-Reviewer click here. Form instructions for the Principal Investigator click here.	
Pre-Reviewer ID: 800550129 Lee, Melvina	
Project Number: 556401	
Form Submission Confirmation	х
P 800559884 Monica Akerele RA - Graduate Assistantship \$1,800.00 250.00 119850	G11100 +
Total: \$1,800.00 \$250.00	
Pre-Reviewer Comments Comments are for informational purposes only. Any changes or corrections to payroll require action of your department Research Administrator and/or GCA Testing	
	1.
The Payroll Certification Form has been reviewed and submitted for the PI to certify. No further action is required, Please c	lose the tab.

The Pre-Reviewer will receive an email confirmation, as shown below:

	ImageNow Help <imagenowhelp@uncc.edu< th=""></imagenowhelp@uncc.edu<>
Pre-reviewer Confirmation for Annual Grant Payroll Certification	(
gca-payroll-cert@uncc.edu ≺gca-payroll-cert@uncc.edu> To: mierlo%@ex.uncc.edu Bo:: magerowhe/@uncc.edu	Fri, Nov 30, 2018 at 2:23 PM
Melvina Lee,	i i
Your pre-reviewed Payroll Certification for Project Number 556249, Patient Mobility Data Assessment Center has been processed and submitted to Naiguan Zheng for certification.	
Thank you,	
GCA - Cost Analysis Group	

15. To exit the form, close the browser or tab.



RED Documents View

To review PCF documents in Perceptive Content. This process is not use to certify the PCF, only to view the documents once they have been submitted.

- a. Login to Perceptive Content, <u>imaging.uncc.edu</u>, using your NinerNet credentials. **Note:** Java is required or to use the client, go to the Software Center and install Perceptive Content client on your PC.
- b. Click the *RED Documents* view and use one of the following filters to search for documents as shown below:
 - By PCF Grant #
 - By PCF PI ID
 - By PCF PI Name

Note: denotes that the document is in workflow being processed; otherwise the document has been processed.

c. To view the desired document, double click the line item to open the document.



d. Press F7 to view the document *PROPERTIES* displayed on the right-hand side panel as shown below. In the *CUSTOM PROPERTIES* section, you can see other detailed information.

2		Pe	erceptive Conte	ent Viewer -	[Page 1]			_	D X
<u>F</u> ile <u>V</u> iew <u>A</u> nnota	tion <u>W</u> orkflow Fo <u>l</u> ders W	indow <u>H</u> elp							_ 81
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	Research and E	Grant/Project Name							
UNC CHARLOT	Grant Payroll Certification						A Hermetically Sealed Mag	gnetically Geare	
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Form instructions for the	Pre-Reviewer click here.						End Date		
Form instructions for the	Principal Investigator click here.						09/30/2019		
Des Devieurs ID:	0000440CE Maint I	Normal L					Unique ID		
Fie-Neviewer iD.	000211303 IMelet, V	venuy					321Z321_02PV7CXG000	JDXR	
Grant Details:							Document Type		
Project Number:	553637					Payroll Certification Form V			~
Project Title:	A Hermetically Sealed Magnetica	ally Geared Marine Hydroki	netic Generator					Mo	re
Principal	Wesley Williams						Kustom Properties		۲
Project Start Date:	40/04/2017	Project End Date:	00/20/2040				Status Reason - PCF	Certified	^
Project start bate.	10/01/2017	Project End Date.	05/30/2015				Cost Share	No	
Reporting Start	10/01/2017	Reporting End	06/30/2018				Cost Share Info:		
Date:		Date:					Ed	it	=
						_	Approver Info:		
Payroll Detail							Approver Type	Principal Investigat	tc
			0				Status Reason	Approved	
Fund ID	Employee Name Role	Salary	Amount	CS Fund	CS Acct		Approval Date	02/01/2019	- .
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I numbrails Relate	d Documents								
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e. Once the document is open, you can email, print, or export and save the

document file locally, using these icons

f. Press the **E** to exit the document and return to the previous list.



WebFocus Report On Report Central

Executing the Report Central report and reviewing excluded earnings codes

To run the *Payroll Distribution Report*:

- Log into Report Central via <u>reportcentral.uncc.edu</u> using your NinerNet credentials.
- Click the Departmental Financial/HR Reporting Portal. **Note**: You will be prompted again for your NinerNET credentials.
- The Payroll Distribution Report will display.
- Select Transaction Date and enter date range for fiscal year certifying, ie. 2017/07/01 2018/06/30 for FY 2018.
- Either enter the UNCC ID number for a specific individual or enter the Fund Number for the entire payroll list.
- Un-check Include Benefit Accounts.
- Click the Submit button and the excel sheet will download.



When reviewing the Report Central report and verifying salaries, below is a list of highlighted earnings codes that are excluded on the report; resulting in salaries not matching the Grant Payroll Certification Form, see below. Please adjust your totals as necessary to pre-review all salaries. The earnings codes can be found on the Detail tab of the Payroll Distribution report in the "PAYROLL EARNINGS" column.

*the earnings codes in yellow below are excluded from the WebFocus query							
<u>Code</u>	Description		Code	Description			
10	Regular Semi Monthly		291	Shared Bonus - Family			
11	Regular Monthly		300	Advanced Leave			
12	Student Hourly		301	Short Term Disability W/FICA			
13	Miscellaneous Pay Student		305	Advanced Sick Leave			
14	Stipend		30V	Advanced Vacation Leave			
15	Longevity		370	Vac Advance Leave Adjustment			
16	Bonus Pay		380	Sick Advance Leave Adjustment			
1/	Non-Student Hourly Pay		420	Leave Without Pay - Manual			
18	Miscellaneous Pay SHRA Perm		421	Leave Without Pay -System			
20	Regular EHRA Monthly		422	Furlough Deduction			
22	SHRA Temp Salary		505	Employee Award Program			
2/	CWS - Academic Year No FICA		510	Moving Exp. Taxable/ no Retire			
28	CWS - Summer Pay No FICA		601	Short Term Disability No FICA			
30	Overtime At 1.0		611	Regular Wonthly Pay No FICA			
31	Callback At 1 5		612	Miscellancous Day No FICA			
32	Caliback At 1.5		613	Non-Student Housiv Day No FICA			
33	Dir Call At \$.94/Hour		617	Overtime At 1.5 No FICA			
34	Holiday Promium Pay		641	Sum/Sch Day Rog Tay No EICA			
35	On Call At \$2.00 Hour		406	Adjustment EICA			
41	Night Shift - Salariad		A00	Adjustment No EICA			
41	Night Shift - OT calaried		E01	Student Fee-Ins-Post Doc-tax			
130	Student Stinend		F02	Student Health Ins			
130	Bonus		F05	Moving Exp Cash No Tax No Ret			
132	Dual Employment		F06	Moving Exp Cash Taxable No Ret			
134	Special Pay FHRA		F07	Moving Exp cash raxable No Ret			
135	Special Pay/Extension Teaching		F08	Taxable Moving Expense Payment			
136	Extra Pay No Retire		F10	Car Allowance - (FICA FED NC)			
137	Sev Pay Exempt NC Tax & Retire		F11	MCD monthly allow			
138	Military Differential		F12	MCD 1 time			
139	LEO Special Separation Allow		F13	MCD Data Only			
140	Sev Pay Excess \$35.000 No Ret		F14	MCD Exception Rate			
141	Summer School Pay Reg Tax		F15	Vehicle-Personal (FICA,Fed,NC)			
142	SHRA Merit		F20	Club Dues (FICA, Fed, NC taxes)			
143	EHRA Merit		F25	Imputed Income (FICA,Fed,NC)			
150	Holiday Pay		F30	Tuition Waiver FICA, Fed, NC tax			
160	Flex Leave		F40	Other Taxable Fringe Ben NoRet			
161	Gap Compensatory Time Taken		F41	Taxable Reimb - Special Pay			
162	Regular Compensaory Time Taken		F42	Travel			
163	Incentive Comp Time Taken		L01	Leave w/Pay w/Benefits			
165	Payout of Gap Comp		L02	Leave w/o Pay w/o Benefits			
166	Payout of Regular Comp		L03	Leave w/o Pay w/Benefits			
170	Vacation		L04	Leave w/Partial Pay w/Benefits			
171	Community Service Leave		R10	Retro Regular Semi-monthly			
172	Military Leave Taken		R11	Retro Regular Monthly			
175	Payout of Vacation Leave		R12	Retro - Student Hourly			
176	Wages Paid Deceased Employee		R13	Retro Miscellaneous Pay			
180	Sick Leave		R14	Retro SS Semi-Monthly			
190	Bonus Leave		R17	Retro Non-Student Hourly			
191	FY14 Special Leave		R1X	Retro - not included in ERS			
195	Payout of Bonus Leave		R27	Retro-FWS Academic Year			
196	Payout of FY14 Special Leave		R28	Retro-FWS Summer School			
200	Shared Leave		T11	Retro Regular Monthly-No Fica			
270	Shared Vacation - Non Family		T12	Retro Student Hourly - No Fica			
271	Shared Vacation - Family		113	Retro Misc Pay - No Fica			
280	Shared Sick ã€" Non Family		11/	Retro Non-Student Hrly-No Fica			
281	Shared Sick - Family		WCL	wkmn's Comp useLv to cover ded			
290	Shared Bonus as "Non Family		-				



Appendix A

An example of a reminder email is shown below:

沙	lmageNow Help <imagenowhelp@uncc.edu></imagenowhelp@uncc.edu>
Annual Grant Payroll Certification Followup	
gca-payroll-cert@uncc.edu -gca;payroll-cart@uncc.edu> To: jntavrt2@uncc.edu Boc: magnorwhig@unc.edu	Fri, Nov 2, 2018 at 6:07 PM
Robin Moose,	
This is a followup to a request sent on 11/02/2018 for Payroll Certification	
You have been identified as a Pre-Reviewer for Sponsored Account Project Number 556183;, Critical Infrastructure Resilience.]
Fiscal Year 2018 ends June 30, 2018. The salaries associated with this project must be certified annualy to maintain research compliance with the agency sponsoring this project	and University policy.
The first step is for you to pre-review the salaries charged to Fund Number 560183, then submit the form for final annual certification by the Primary Investigator, Badrul Chowdhur	ry.
Please use https://testimaging.uncc.edu/imagenow/orms/fs?form=Payroll_Certification_Form&certType=Annual&grntTok=VGxSVk1rh/V/aM289 to access the Payroll Certification Chowdhury to complete the certification (including your pre-review) is six (6) weeks from today.	form for pre-review. The deadline for Badrul
Thank you,	
Grants and Contracts Administration	



Appendix B

If you have already reviewed and submitted the Payroll Certification form to the Principal Investigator and click the email link again, the following screen will display:

	ARLOTTE							
🗿 Hide Instru	uctions							
Form instructio	ons for the Pre-Re	viewer click here.						
Form instructio	ons for the Principa	al investigator click here.						
Pre-Re	rviewer ID:	800550129	Lee, Melvina					
Grant Details:								
Proje	ot Number:	000429						
P	Project Title:	Changing the Narrative on Can	npus Gender-Based Vic	lence at UNCC				
Principal Ir	nvestigator:	Annelise Mennicke						
Project Start Date:		10/01/2016	Pr	Project End Date:				
Reporting	Start Date:	07/01/2017	Repo	rting End Date:	06/30/2018			
Payroll Detail								
Employee ID	Employee Name	Roie	Salary	Cost Share	Amount	CS Fund	CS Acct	
800907338	Annelise Mennicke	FRG stipend	\$4,200.00					•
800907338	Annelise Mennicke	research associate	\$1,963.00					+
800907338	Annelise	Assistant Professor	\$72,135.09					+
	Mennicke	No	further action is re	quired, Please d	lose the tab.			
	Mennicke	No	further action is re	quired, Please o	lose the tab.			
E E	Mennicke Portwood	No Lastrator	further action is re	quired, Please o	lose the tab.		_	
800953982	Mennicke Potwood Erika Montanare	No Summer School Tichg 1st 5 wks	further action is re \$5,316.66	quired, Please o	close the tab.			•
800953982 800953982	Mennicke Portwood Erika Montanare	0 Summer School Tochg tast 5 Massistant Professor	further action is re \$5.310.66 \$79,750.04	quired, Please o	close the tab.			•
800953962 800953962 800953962	Mennicke Portwood Erika Montanare Erika Montanare	Summer School Tong 1st S wks Assistant Professor Research Associate	further action is re 55.316.66 579.750.04 \$750.00	quired, Please o	close the tab.			•
e ecce53682 e00953682 e00953682 e00953682	Mennicke Potrwood Erika Montanaro Erika Montanaro Erika Montanaro	Summer School Tchg 1st Swika Assistant Professor Research Associate CRS Faculty Mentor	further action is re 55,316,66 \$79,750,04 \$750,00 \$450,00	quired, Please of	close the tab.			•
800953962 800953962 800953962 800953962	Mernicke Portwood Erika Mortanan Erika Mortanan Erika Mortanan	D Summer School Tong 1st 5 wks D Assistant Professor D Research Associate D CRS Faculty Mentor Total: Total:	further action is re \$5,316.66 \$79,750.04 \$750.00 \$450.00 \$285,451.84	quired, Please of	ilose the tab.			•
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