



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.

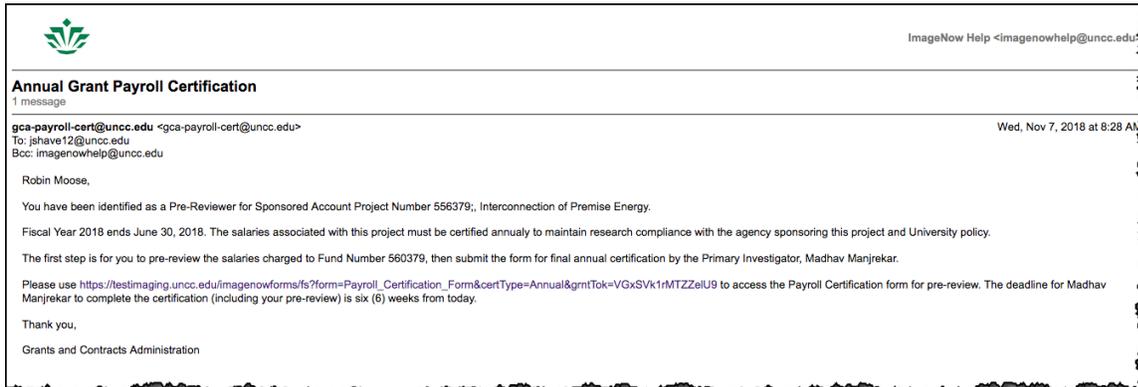


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Using Any Browser To Pre-Review A Grant Payroll Certification Form (PCF)

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:

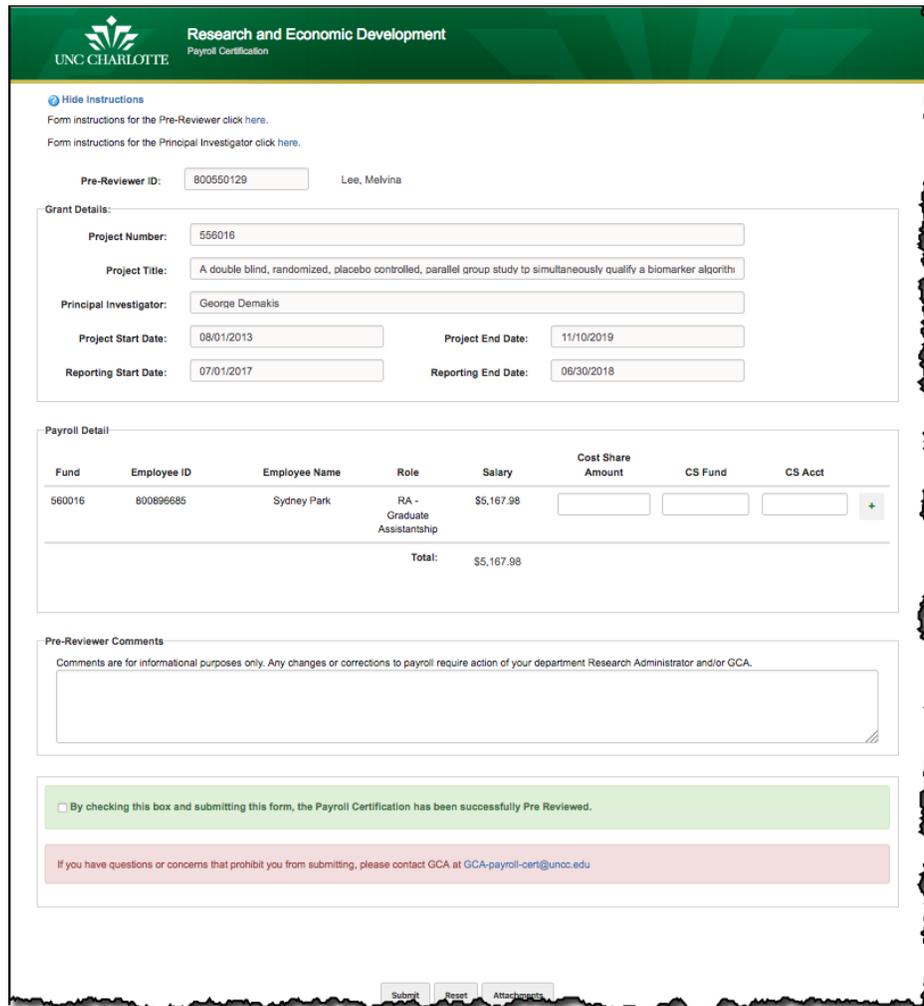


Note: You have three (3) weeks to certify the grant/project's payroll. Three (3) days after you receive the first notice, you will get daily reminders every five (5) days until you complete the certification. See [Appendix A](#) for reminder email text.

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:



Research and Economic Development
Payroll Certification

[Hide Instructions](#)
Form instructions for the Pre-Reviewer click here.
Form instructions for the Principal Investigator click here.

Pre-Reviewer ID: 800550129 Lee, Melvina

Grant Details:

Project Number: 556016
Project Title: A double blind, randomized, placebo controlled, parallel group study to simultaneously qualify a biomarker algorithm
Principal Investigator: George Demakis
Project Start Date: 08/01/2013 Project End Date: 11/10/2019
Reporting Start Date: 07/01/2017 Reporting End Date: 06/30/2018

Payroll Detail:

Fund	Employee ID	Employee Name	Role	Salary	Cost Share Amount	CS Fund	CS Acct
560016	800896685	Sydney Park	RA - Graduate Assistantship	\$5,167.98			
Total:				\$5,167.98			

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.

By checking this box and submitting this form, the Payroll Certification has been successfully Pre Reviewed.

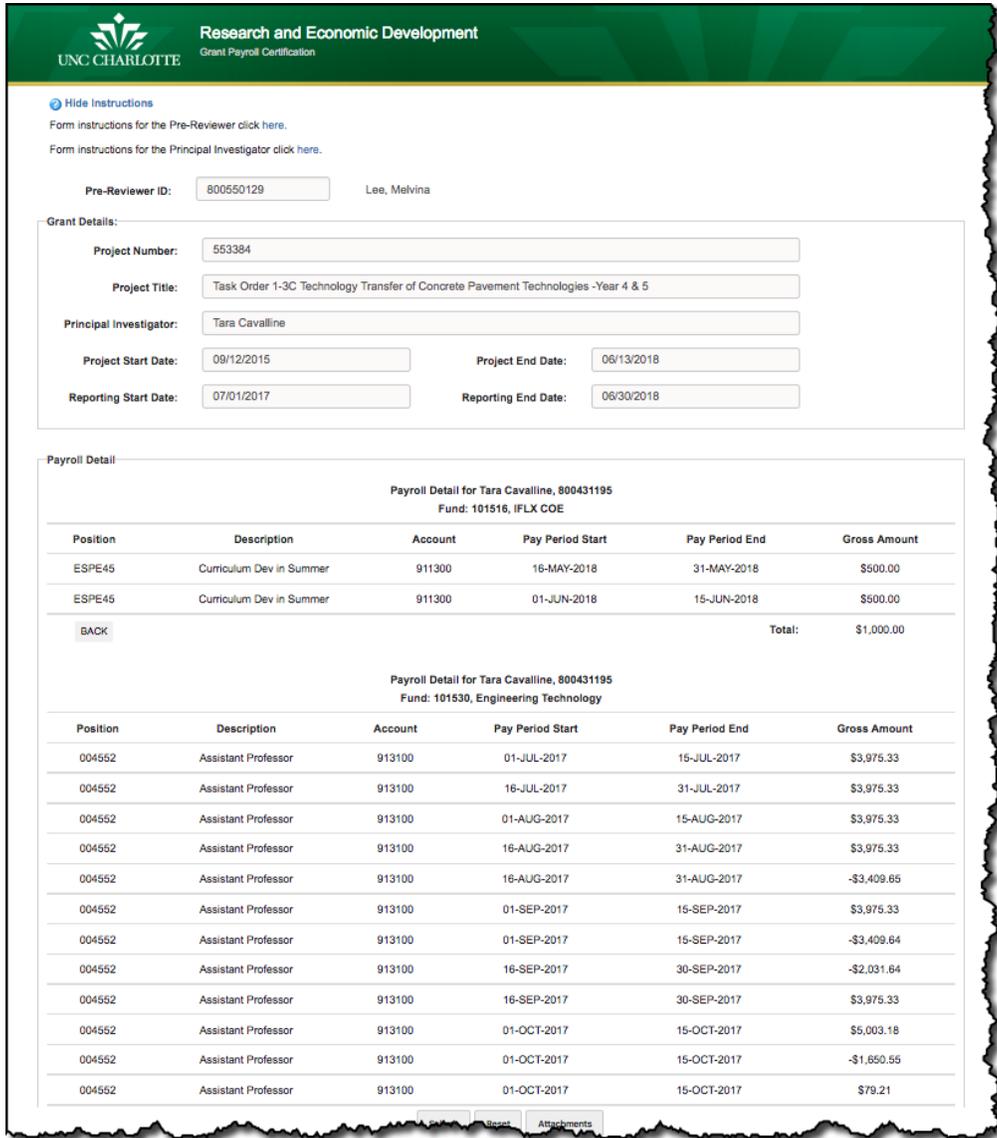
If you have questions or concerns that prohibit you from submitting, please contact GCA at GCA-payroll-cert@unc.edu

Submit Reset Attachments

Note: If you have already previewed and submitted the PCF, see [Appendix B](#) for details.

5. Click the **Hide Instructions**  or **Show Instructions**  buttons to hide or show the instructions.
6. The **Pre-Reviewer ID** (800#) and **Name** will automatically display.

- 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:



Research and Economic Development
Grant Payroll Certification

[Hide Instructions](#)
Form instructions for the Pre-Reviewer click [here](#).
Form instructions for the Principal Investigator click [here](#).

Pre-Reviewer ID: Lee, Melvina

Grant Details:

Project Number:

Project Title:

Principal Investigator:

Project Start Date: Project End Date:

Reporting Start Date: Reporting End Date:

Payroll Detail

Payroll Detail for Tara Cavalline, 800431195
Fund: 101516, IFLX COE

Position	Description	Account	Pay Period Start	Pay Period End	Gross Amount	
ESPE45	Curriculum Dev in Summer	911300	16-MAY-2018	31-MAY-2018	\$500.00	
ESPE45	Curriculum Dev in Summer	911300	01-JUN-2018	15-JUN-2018	\$500.00	
BACK					Total:	\$1,000.00

Payroll Detail for Tara Cavalline, 800431195
Fund: 101530, Engineering Technology

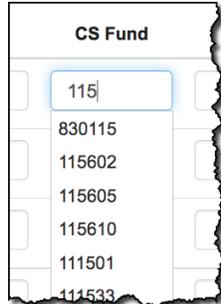
Position	Description	Account	Pay Period Start	Pay Period End	Gross Amount
004552	Assistant Professor	913100	01-JUL-2017	15-JUL-2017	\$3,975.33
004552	Assistant Professor	913100	16-JUL-2017	31-JUL-2017	\$3,975.33
004552	Assistant Professor	913100	01-AUG-2017	15-AUG-2017	\$3,975.33
004552	Assistant Professor	913100	16-AUG-2017	31-AUG-2017	\$3,975.33
004552	Assistant Professor	913100	16-AUG-2017	31-AUG-2017	-\$3,409.65
004552	Assistant Professor	913100	01-SEP-2017	15-SEP-2017	\$3,975.33
004552	Assistant Professor	913100	01-SEP-2017	15-SEP-2017	-\$3,409.64
004552	Assistant Professor	913100	16-SEP-2017	30-SEP-2017	-\$2,031.64
004552	Assistant Professor	913100	16-SEP-2017	30-SEP-2017	\$3,975.33
004552	Assistant Professor	913100	01-OCT-2017	15-OCT-2017	\$5,003.18
004552	Assistant Professor	913100	01-OCT-2017	15-OCT-2017	-\$1,650.55
004552	Assistant Professor	913100	01-OCT-2017	15-OCT-2017	\$79.21

Print | [Back](#) | [Attachments](#)

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

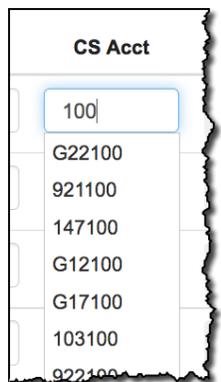
- Click the **Back** button to return to the previous screen.

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:



A screenshot of a dropdown menu titled "CS Fund". The search input field contains "115". The dropdown list shows the following options: 830115, 115602, 115605, 115610, 111501, and 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:



A screenshot of a dropdown menu titled "CS Acct". The search input field contains "100". The dropdown list shows the following options: G22100, 921100, 147100, G12100, G17100, 103100, and 922100.

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

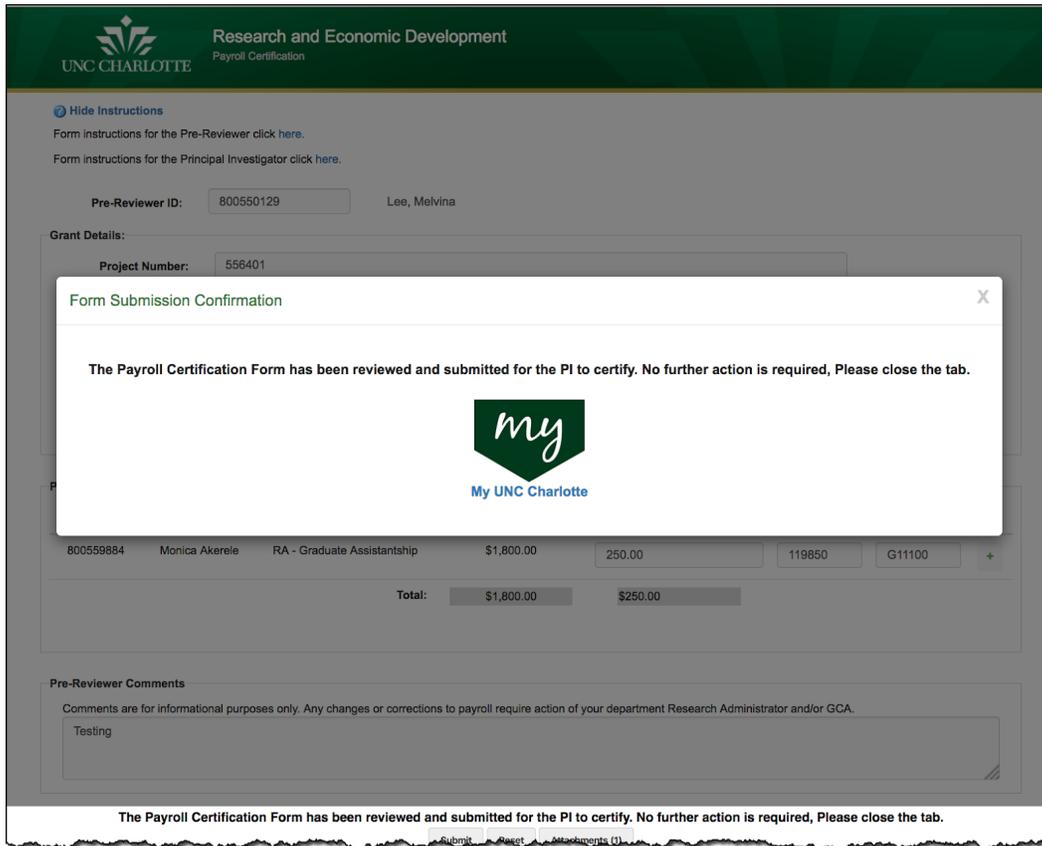
10. To add an additional line, click the **Add Line**  button. You can also remove any **Cost Share** line by clicking the **Remove Line**  button.

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.

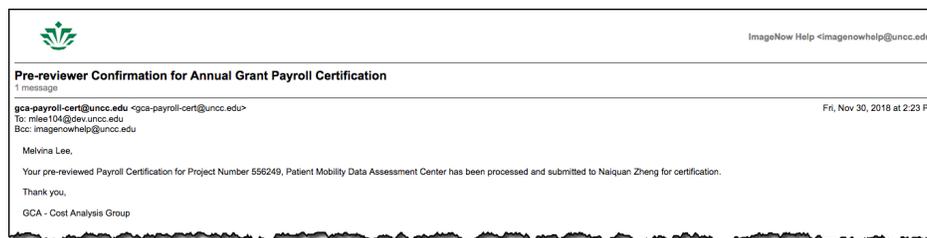
12. If applicable, click the **Attachments** button to attach any supporting documentation.
13. Click the checkbox to acknowledge the payroll certification has been successfully reviewed.

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



The screenshot shows the 'Research and Economic Development Payroll Certification' form. A modal window titled 'Form Submission Confirmation' is displayed in the center, containing the text: 'The Payroll Certification Form has been reviewed and submitted for the PI to certify. No further action is required, Please close the tab.' Below the text is the 'My UNC Charlotte' logo. The background form shows the Pre-Reviewer ID as 800550129 (Lee, Melvina) and Project Number as 556401. A table below the modal shows payroll details for Monica Akerele (RA - Graduate Assistantship) with a total of \$1,800.00. At the bottom, there is a 'Pre-Reviewer Comments' section with the text 'Testing' and a 'Submit' button.

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



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

RED Documents View

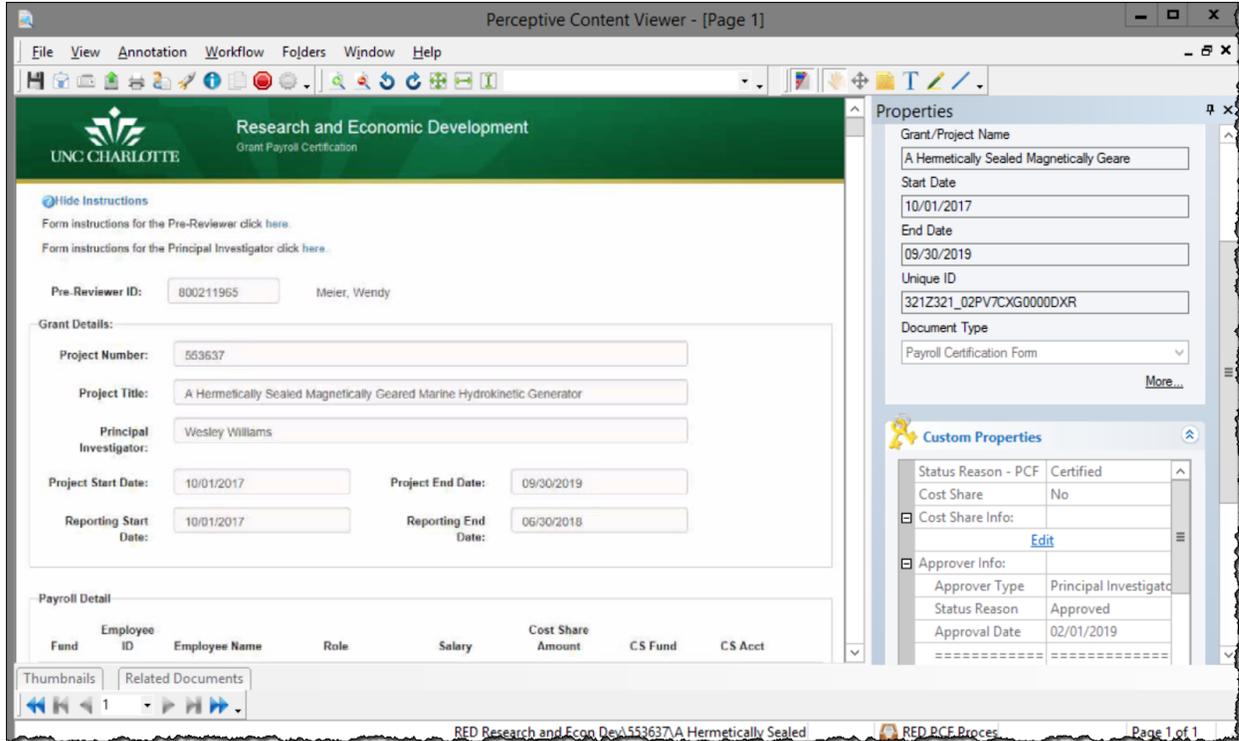
To review PCF documents in Perceptive Content. This process is not use to certify the PCF, only to view the documents once they have been submitted.

- a. Login to Perceptive Content, imaging.uncc.edu, 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.



- e. Once the document is open, you can email, print, or export and save the document file locally, using these icons .
- f. Press the  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 reportcentral.uncc.edu 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

Code	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
17	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
27	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 1.5	611	Regular Monthly Pay No FICA
31	Overtime At 1.0	612	Regular Hourly Pay No FICA
32	Callback At 1.5	613	Miscellaneous Pay No FICA
33	On Call At \$.94/Hour	617	Non-Student Hourly Pay No FICA
34	Retroactive OT and NS	630	Overtime At 1.5 No FICA
35	Holiday Premium Pay	641	Sum/Sch Pay Reg Tax No FICA
36	On Call At \$2.00 Hour	A06	Adjustment FICA
41	Night Shift - Salaried	A07	Adjustment No FICA
42	Night Shift - OT salaried	F01	Student Fee-Ins-Post Doc-tax
130	Student Stipend	F02	Student Health Ins
132	Bonus	F05	Moving Exp Cash No Tax No Ret
133	Dual Employment	F06	Moving Exp Cash Taxable No Ret
134	Special Pay EHRA	F07	Mov Exp3rdPty NonCash NoTxRet
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	T13	Retro Misc Pay - No Fica
280	Shared Sick - Non Family	T17	Retro Non-Student Hrlly-No Fica
281	Shared Sick - Family	WCL	Wkmn's Comp useLv to cover ded
290	Shared Bonus - Non Family		

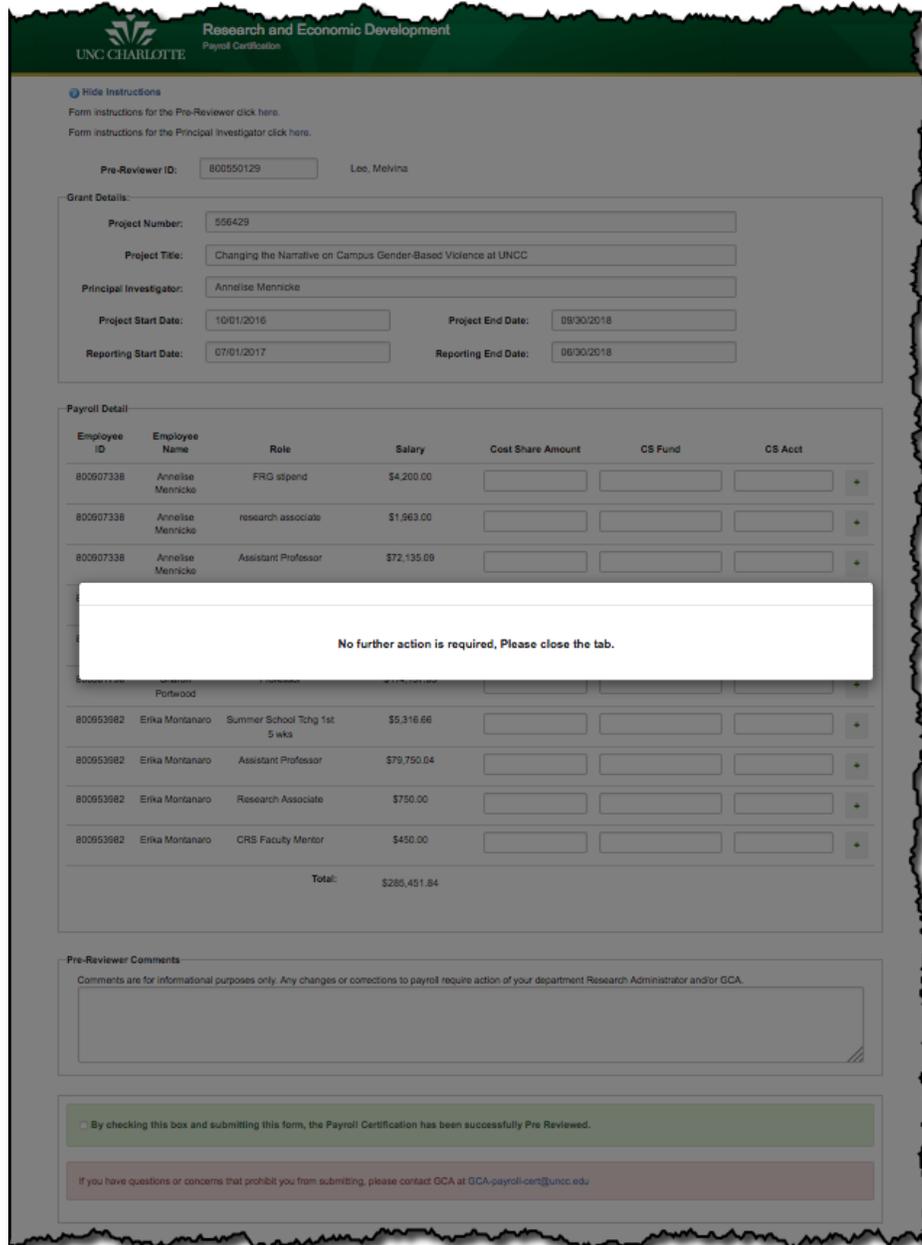
Appendix A

An example of a reminder email is shown below:



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:



UNC CHARLOTTE Research and Economic Development Payroll Certification

[Hide Instructions](#)

Form instructions for the Pre-Reviewer click here.
Form instructions for the Principal Investigator click here.

Pre-Reviewer ID: Lee, Melvina

Grant Details:

Project Number:

Project Title:

Principal Investigator:

Project Start Date: Project End Date:

Reporting Start Date: Reporting End Date:

Payroll Detail

Employee ID	Employee Name	Role	Salary	Cost Share Amount	CS Fund	CS Acct
800907338	Annelise Mennicke	FRG stipend	\$4,200.00	<input type="text"/>	<input type="text"/>	<input type="text"/>
800907338	Annelise Mennicke	research associate	\$1,963.00	<input type="text"/>	<input type="text"/>	<input type="text"/>
800907338	Annelise Mennicke	Assistant Professor	\$72,135.09	<input type="text"/>	<input type="text"/>	<input type="text"/>
No further action is required, Please close the tab.						
	Putwood					
800953982	Erika Montanaro	Summer School Tchg 1st 5 wks	\$5,316.66	<input type="text"/>	<input type="text"/>	<input type="text"/>
800953982	Erika Montanaro	Assistant Professor	\$79,790.04	<input type="text"/>	<input type="text"/>	<input type="text"/>
800953982	Erika Montanaro	Research Associate	\$750.00	<input type="text"/>	<input type="text"/>	<input type="text"/>
800953982	Erika Montanaro	CRS Faculty Mentor	\$450.00	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total:			\$285,451.84			

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.

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