



**RED Grant Payroll Certification
Process Principal Investigator (PI)
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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To Certify/Not Certify a Payroll Certification Form (PCF) Task

The *Principal Investigator* will receive an email with a link to a PCF, form as shown below:

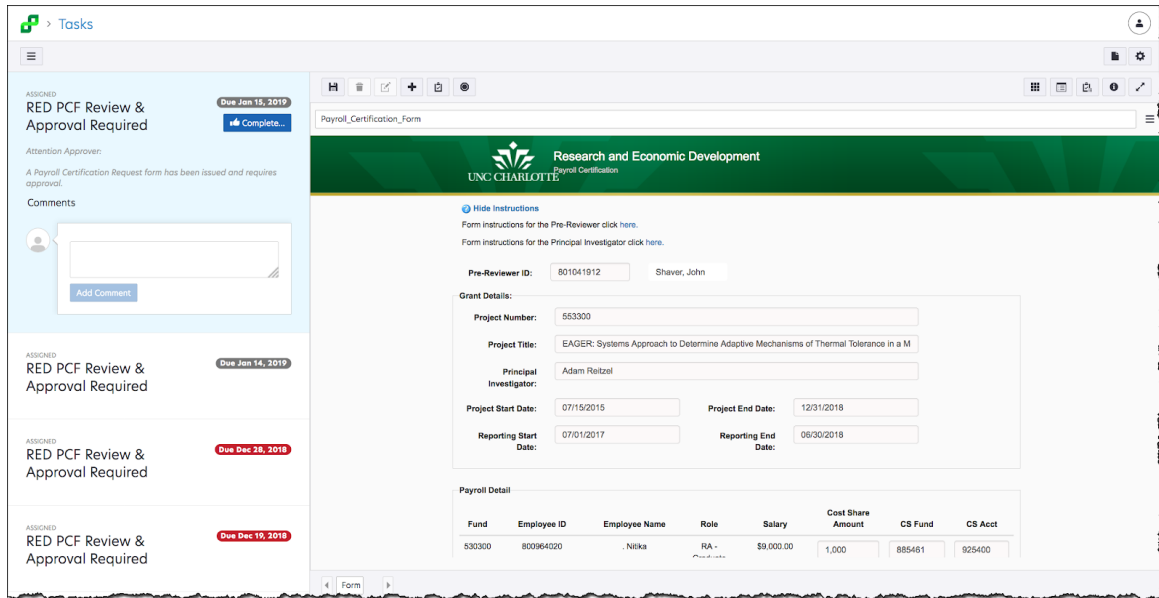


Note: You have three (3) weeks to certify the grant/project's payroll. Three (3) days after you receive the first notice, you will get daily reminders every five (5) days until you complete the certification. See [Appendix A](#) for reminder emails.

1. Click the link in the above 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 *Payroll Certification Form* is displayed:

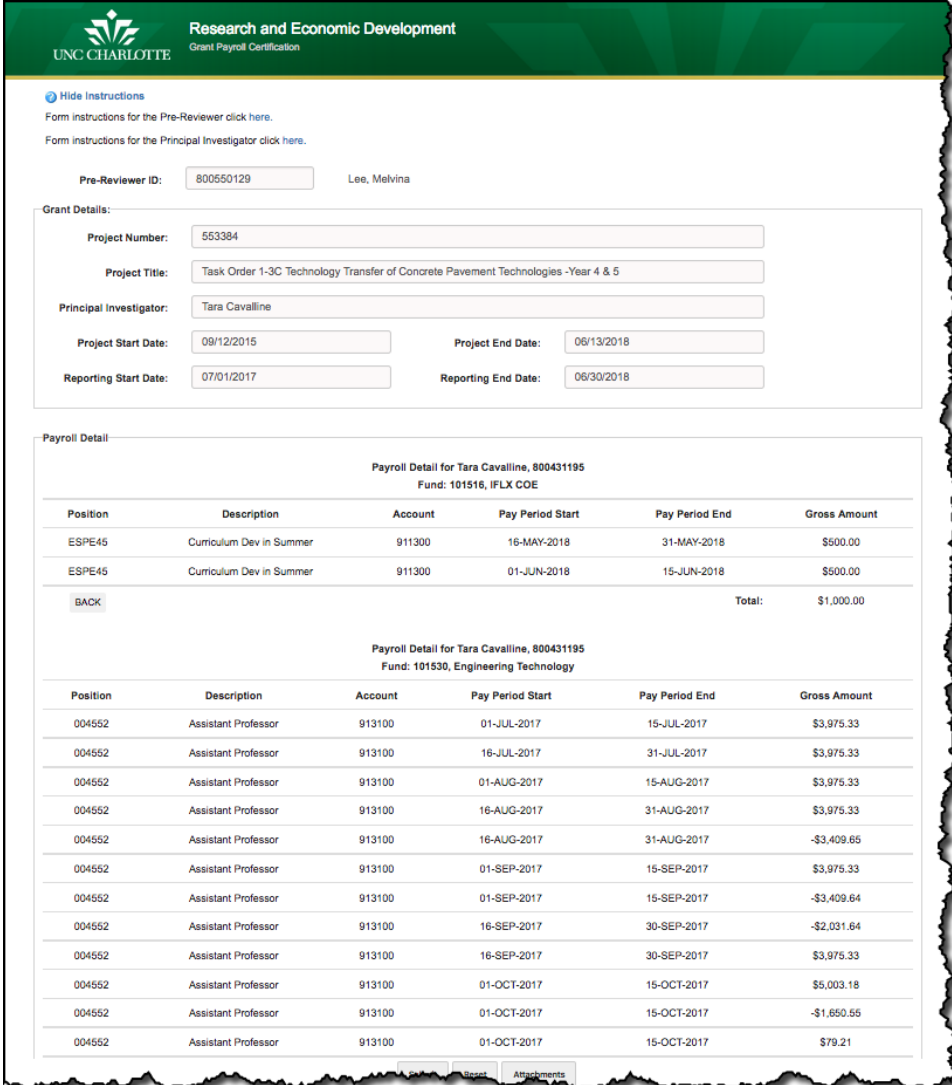


The screenshot displays a web application interface for the Payroll Certification Form. On the left, a sidebar shows a 'Tasks' section with three notifications: 'RED PCF Review & Approval Required' with due dates of Jan 15, 2019, Jan 14, 2019, and Dec 19, 2018. The main content area features a green header for 'Research and Economic Development' and a form titled 'Payroll_Certification_Form'. The form includes instructions for Pre-Reviewer and Principal Investigator, a 'Pre-Reviewer ID' field (801041912, Shaver, John), and a 'Grant Details' section with fields for Project Number (553300), Project Title (EAGER: Systems Approach to Determine Adaptive Mechanisms of Thermal Tolerance in a M...), Principal Investigator (Adam Reitzel), Project Start Date (07/15/2015), Project End Date (12/31/2019), Reporting Start Date (07/01/2017), and Reporting End Date (06/30/2018). Below this is a 'Payroll Detail' table.

Fund	Employee ID	Employee Name	Role	Salary	Cost Share Amount	CS Fund	CS Acct
530300	800964020	Nitika	RA -	\$9,000.00	1,000	885461	925400

4. Perform your due diligence:
- a. Review the online form to the right of the screen.

- b. 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

UNC CHARLOTTE

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: 553384
Project Title: Task Order 1-3C Technology Transfer of Concrete 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 Reporting End Date: 06/30/2018

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	-\$3,409.85
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

BACK Attachments

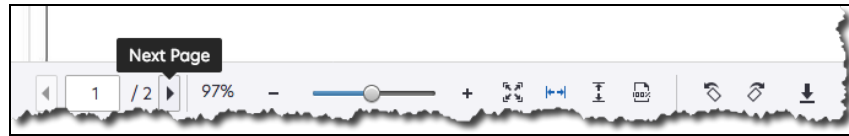
Note: Payroll history for all funds will display for selected employee.

- c. Click the **Back**  button to return to the previous screen.
d. If applicable, verify the **Cost Share Amount/Fund/Account** combination.
e. If applicable, attach supporting documentation by using the **Add** icon



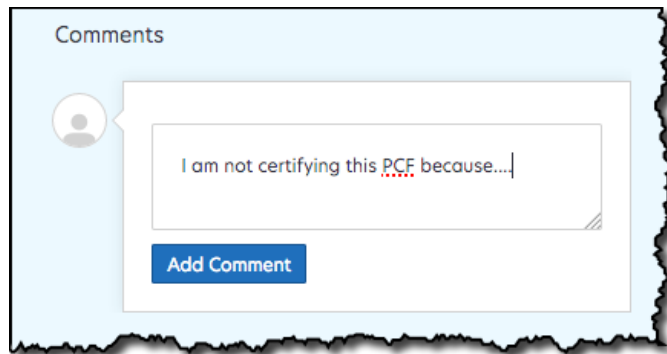
- f. If you make changes, click the **Save** icon  to retain your changes.

- g. Review any attachments using the **Next Page** button as shown below:

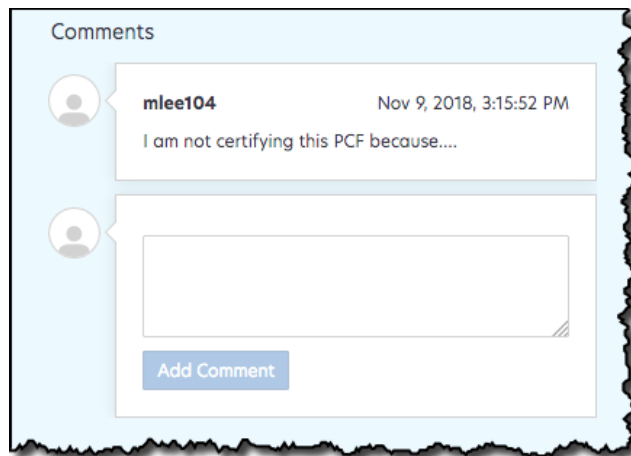


5. Certify or Not Certify the form:

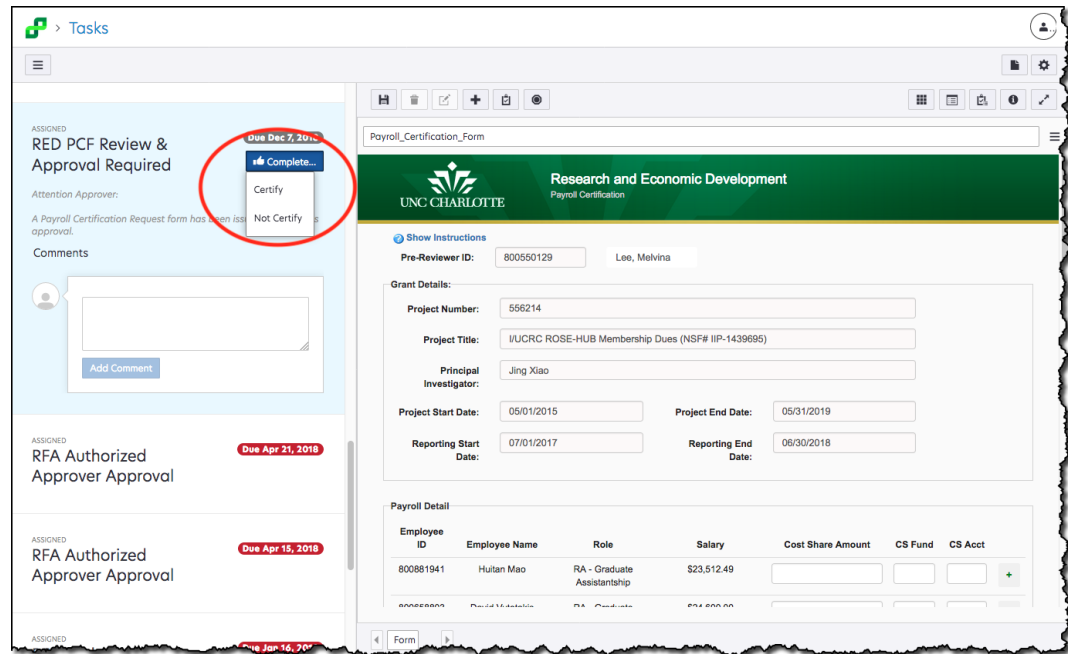
- a. If **not** certifying, please enter a comment explaining the reason, as shown in the example below:



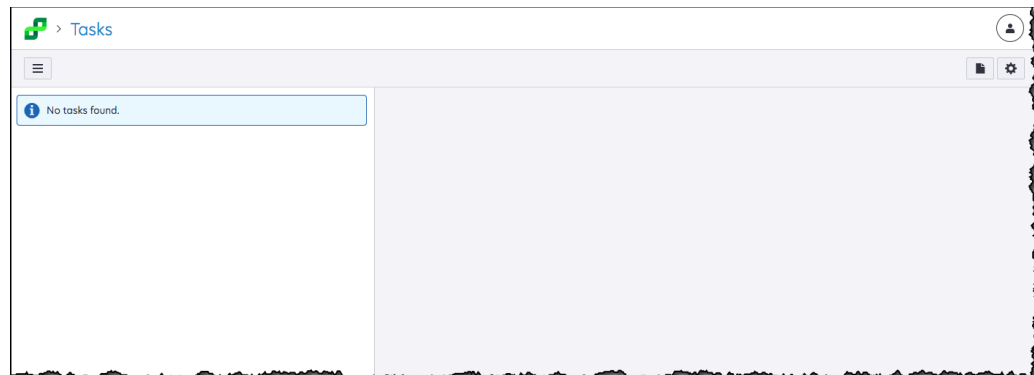
- b. Click the **Add Comment** button to display your comments, as shown below:



- c. Click the **Complete** button to select *Certify* or *Not Certify*, as shown below:

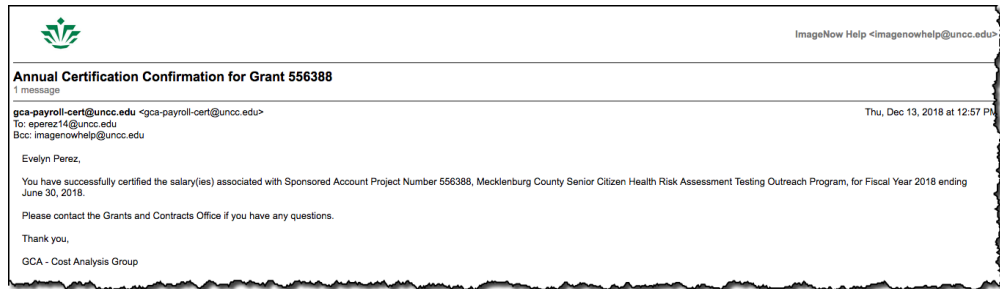


- d. Once all tasks have been completed, a **No Tasks Found** message will be displayed as shown below:

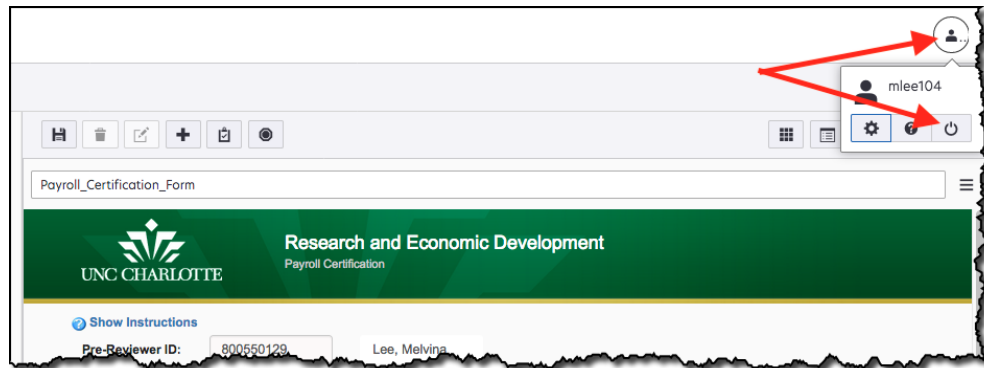




- e. The Principal Investigator will receive an email confirmation, as shown below:



- f. **Important:** To exit the application, click the *Disconnect* button as shown below:

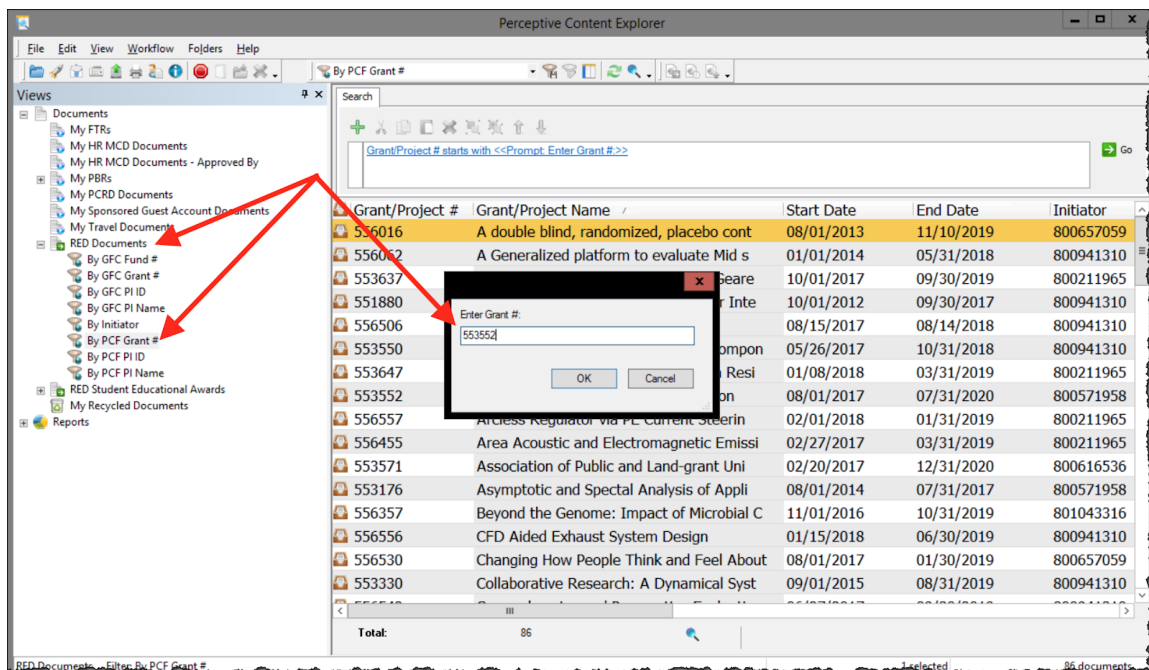


Note: By disconnecting, you will not get a session timeout or CSRF error the next time you login to certify a PCF document.


RED Documents View

To review PCF documents in Perceptive Content. This process is not used 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

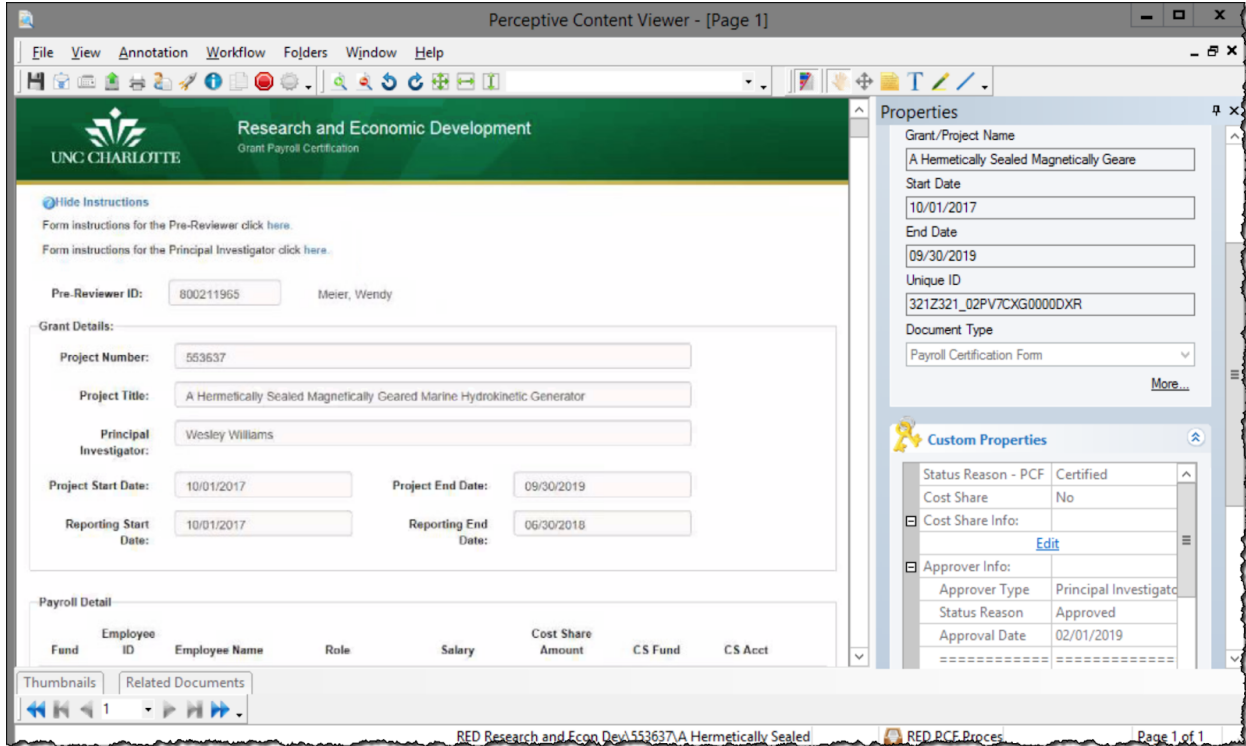




Grant/Project #	Grant/Project Name	Start Date	End Date	Initiator
556016	A double blind, randomized, placebo cont	08/01/2013	11/10/2019	800657059
556002	A Generalized platform to evaluate Mid s	01/01/2014	05/31/2018	800941310
553637		10/01/2017	09/30/2019	800211965
551880		10/01/2012	09/30/2017	800941310
556506		08/15/2017	08/14/2018	800941310
553550		05/26/2017	10/31/2018	800941310
553647		01/08/2018	03/31/2019	800211965
553552		08/01/2017	07/31/2020	800571958
556557		02/01/2018	01/31/2019	800211965
556455		02/27/2017	03/31/2019	800211965
553571		02/20/2017	12/31/2020	800616536
553176		08/01/2014	07/31/2017	800571958
556357		11/01/2016	10/31/2019	801043316
556556		01/15/2018	06/30/2019	800941310
556530		08/01/2017	01/30/2019	800657059
553330		09/01/2015	08/31/2019	800941310

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 displayed as shown below:

