

Processing the SUNY Payroll (IFR and Cost Sharing) Appointment Change Form

Effective Date: October 19, 2018

Function: Payroll

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Basis for Procedure

This document provides instructions for completing the SUNY IFR/Cost Sharing Appointment/Change Form.

Procedure Summary

The following procedure will demonstrate how to process SUNY payroll appointments in the Research Foundation Oracle operating system.

Procedure

The tables below provide instructions for completing the form fields in Oracle.

Top of Form – First Page

Instructions for completing the fields at the top of the form:

Field	Instructions
Location	3-digit campus location number (i.e., 020)
Action	<ul style="list-style-type: none"> a. Check "New Appt" if the person has never had an IFR/CS assignment before. b. Check "Appt Change" if this is a change to an existing IFR/CS assignment. c. Effective Date: this should be the date the change to the IFR/CS record is effective. For example, if the person is receiving an increase in their SUNY salary effective 01-OCT-2002 this is the date you should enter.
IFR/CS Appointment Period	This is the period that the award will be reimbursing SUNY for the person's salary or the period the person is cost sharing on an award. This is NOT the period for which the person is paid through SUNY (i.e., academic or calendar year), These dates may be the same but do not have to be. For example, Dr. Smith is appointed at SUNY for an academic period 26-AUG-2002 through 16-MAY-2003. Either SUNY is being reimbursed or s/he is cost sharing for the time he is expending

	<p>on an RF award for the fall semester only. The dates for the IFR Appointment Period are:</p> <ul style="list-style-type: none"> a. Start Date 26-AUG-2002 b. End Date: 27-DEC-2002
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People Data

Instructions for completing the fields in the People Data section:

Field	Instructions	
Last Name	Person's last name	
First Name	Person's first name	
Middle Name	Person's middle name or initial	
Title	Check the appropriate title for the person	
Sex	Check the appropriate sex for the person	
Type	This will be <i>Internal</i> unless this is a termination change, then it will be <i>ExInternal</i>	
Social Security #	Person's social security number (SSN)	
Birth Date	Person's birth date if known, otherwise use 01-JAN-1979	
New Hire	Will always be <i>Exclude</i>	
Exclusion Reason	Will always be <i>Not an Employee</i>	
I-9	Will always be <i>N/A</i>	
Assignment #	If this is a new person in Oracle	this number is not known.
	If the person already exists but this is a new IFR/CS appointment	then the number will be as it is on the person's existing assignment but will have a 2, 3, etc, added to it.
	If this is a change to an existing IFR/CS assignment	the number is exactly as it is on the assignment you are changing

Address

Instructions for completing the fields in the Address section:

Field	Instructions
US (Primary) Address	Person's address if known, otherwise use the campus default address.

Primary	This indicates whether or not the address should be used as the person's primary address. If there is only one this is the primary by default and must be a US address.
E-mail	Enter a valid e-mail address.

Assignment

Instructions for completing the fields in the Assignment section:

Field	Instructions	
Organization	XXX SUNY IFR Cost Sharing where XXX is the campus 3-digit location number. The organization should always be the SUNY IFR Cost Sharing organization for the campus as this ensures that any undistributed amounts will be passed to the Other Institutional Activity (OIA) award for the campus and not to the Suspense award.	
Group Flexfield	Location	Campus 3-digit location number
	Assignment Group	Will always be SUNY EE
Job	Will always be <i>No Job Required</i>	
Payroll	Will always be <i>SUNY</i>	
Grade	Will always be <i>N/A.0</i>	
Status	Will always be <i>SUNY</i> unless this is a termination change then it will be <i>Terminated - Processes Pending or Terminated - Do Not Process</i>	
Location	Will be the main campus location (i.e., 020 Binghamton)	
FTE	Will always be 0.00 (This is a field that drives benefits not percent of effort on an award. As SUNY employees do not receive RF benefits it should always be zero.)	
Employment Category	Will always be <i>Not an Employee</i>	
GRE & Other Data	GRE	Will always be <i>The Research Foundation of SUNY</i>
	Time Card Required	Will always be <i>No</i>
Salary Basis	Will always be <i>Non-Employee</i>	
SUNY Statement of Earnings_Verified	Check this when you have verified the SUNY salary for the person.	

Entry Values - SUNY Earnings Element

Instructions for completing the fields in the Entry Values - SUNY Earnings Element section:

Field	Instructions
Annual SUNY Salary	Person's annual salary on the SUNY payroll
Beg Date of SUNY Appt Year	Date SUNY salary starts - in the example from above Dr. Smith's date would be 26-AUG-2002. If this were a calendar year (12 month) appointment the start date would be the date of the institution's calendar year(i.e., 01-SEP-2002, or 01-JAN-2002),
End Date of SUNY Appt Year	Date SUNY salary starts - as above Dr Smith's date would be 16-MAY-2003. If this were a calendar year (12 month) appointment the end date would be a year from the start date (i.e., from above 31-AUG-2003 or 31-DEC-2003).
Retro Required?	Select <i>Yes</i> if the monthly payroll in which the effective date of the new appointment or change falls, has already past. For example, the effective date of Dr. Smith's appointment is 26-AUG-2002, if the monthly payroll for August has already run then retro would be required. Select <i>No</i> if the monthly payroll in which the effective date of the new appointment or change falls, has not run. To determine if the payroll has run refer to the Payroll and Labor Distribution Schedule for RF and SUNY.
Retro Begin Date	The start date the system should use when calculating the retro amount. This should correspond with the first date of the new appointment or change (from Dr. Smith example 26-AUG-2002).
Retro End Date	The last date the system should use when calculating the retro amount. This should be the last date of the prior payroll period. For example, if Dr. Smith's form is being completed in September then the retro end date should be 31-AUG-2002. If the form was being completed in October then the retro end date should be 30-SEP-2002, and so on.
Input By	Name of person who input HR data.
Date	Date HR data was input.

Top of Form - Second Page

Instructions for completing the fields at the top of the second page of the form:

Field	Instructions
Name	Name of person for which the IFR/CS appointment/change is being processed.
Employee #	Assignment number of the person for which the IFR/CS appointment/change is being processed.

SSN	Social Security Number of the person for which the IFR/CS appointment/change is being processed.
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Schedule Lines

Instructions for completing the fields in the Schedule Lines section:

Field	Instructions
Schedule Hierarchy	Assignment
	Element
Complete the following fields for each distribution:	
Project	IFR or cost sharing project number
Task	IFR or cost sharing task number
Award	IFR or cost sharing award number
Organization	3-digit campus code + department. In Oracle, choose appropriate option from drop down "List of Values."
Exp. Type	Choose one of the following IFR or Cost Sharing expenditure types used in the Labor Distribution module:
	IFR
	SWI SUNY IFR Regular SWI SUNY IFR Graduate SWI SUNY IFR Regular No Fringe
	Cost Sharing
	CSS Cost Share Sal Regular CSS Cost Share Sal Summer CSS Cost Share Sal Undergrad
Start Date	Start of IFR/Cost Sharing appointment (dd-mmm-yyyy)
End Date	End of IFR/Cost Sharing appointment (dd-mmm-yyyy)
%	Percentage of distribution (for IFR/Cost Sharing appointments. The labor schedule lines do not have to total 100%. The Other Institutional Activities account will be used for any remaining distribution.

SUNY Chart of Accounts

Instructions for completing the fields in the SUNY Chart of Accounts section:

Field	Instructions
SUNY COA	For IFR appointments, the SUNY department that will be reimbursed. In Oracle, choose appropriate option from drop down "List of Values."
Input By	Name of person who input the labor distribution data.
Date:	Date labor distribution data was input.

Definitions

None

Related Information

None

Forms

[IFR/CS Calculation of Award Changes Worksheet \(XLS\)](#)

Change History

Date	Summary of Change
February 28, 2024	Updated Contact
August 4, 2023	Updated contact information
October 19, 2018	Removed the Supervisor from the assignment form required fields.

Feedback

Was this document clear and easy to follow? Please send your feedback to webfeedback@rfsuny.org.