

2024 College of Sciences Summer Salary Training



February 22, 2024

Amanda Savas
Assistant Dean, Finance & Business Management

Timing

Lunch	12:30 PM - 1:15 PM
Training	1:15 PM - 2:15 PM
Questions	2:15 PM - 3:15 PM

Agenda

- Required Summer Salary Training in REPORTER
- Summer Salary Intake Form and Response Sheets
- Additional Compensation Request Form
 - Codes and Key Regulations
- DocuSign
- Additional Compensation System
- Deadlines
- Questions

Required Training in REPORTER

→ Who must take the training?

- Any employee receiving salary on L5 funds
- Any employee signing/processing paperwork with L5 funds, including L2 Accounting Technicians and Business Managers
- Any employee entering an action involving L5 funds
- Any employee electronically approving actions involving L5 funds

→ **If you are trying to enter an action and receive a warning**, it may be that you or someone related to the action has not completed the mandatory training in REPORTER. Please contact your Department Business Manager

Which Faculty does this apply to?

- 9-month Faculty Only; **NOT** 12-month faculty

- Only for employees at 0.75 FTE or more (<0.75 FTE? Contact COS_humanresources@ncsu.edu)

- 1 Exception to minimum 0.75 FTE requirement:
 - Faculty on phased retirement who are 0.5 FTE
 - However, they cannot take summer salary the first summer they enter phased retirement

Resources

- Each Department will have its own Google Folder with COS-specific materials:
 1. Summer Salary Form Response Sheet
 2. ACRF Template and folder to save completed forms for faculty
 3. SOP
 4. Presentation

- Will also be available on the OFBM intranet, along with links to University Resources:
<https://sciences.ncsu.edu/intranet/college-offices/finance-and-business-management/>

- Click Additional Compensation >> Summer Salary (May 16 - August 15)

New for 2024

- [Summer Salary Intake Form](#) for the entire College
 - Form is meant to handle ALL requests, **with the exception of those faculty who are only being compensated for instruction**. Department Business Manager will take lead and coordinate this request separately
 - Response sheet for each department
 - Research Accountant takes lead, fills out columns, tags DBM when review complete and the department can fill out ACRF
 - DBM (or their designee) will fill out form and route in DocuSign

- Updates on ACRF - Added calculations for half month, Button to override NSF 2/9 Error Message, Removed rows to make the final form easier to read

Earnings Codes - Research

- 601 – work performed 05/16/24 – 6/30/24
- 602 – work performed 07/01/24 – 8/15/24
- Use codes regardless of funding source; they describe effort being expended
- If entering action after 7/1/24 for work performed 5/16/24 – 6/30/24 use 601, not 602. Codes should match period of performance

Earnings Codes - Teaching

- 650 – Summer Instruction; Time Reporting Codes (TRC Code) associated with it describe Session:
 - 651 – Summer Session I
 - 652 – Summer Session II
 - 653 – 10 week Summer Session

- 655 – Maymester

- 996 – Distance Ed

Earnings Codes - Overload

- 619 – Instructional duties performed beyond employee's Statement of Faculty Responsibilities (SFR) during the period of 5/16/24 – 8/15/24

Relevant Resources:

[Earnings Codes from HRIM Website with Description](#)

[9 Month Appointments and 12 Month Administrative Supplements](#)

What months do I use?

Dollar Amount Per Project Per Work Period Per Month			
May	June	July	August

→ For Summer Session Instruction

- ◆ Summer Session I – June
- ◆ Summer Session II – July
- ◆ 10 Week Summer Session – Split 50/50 between June & July

→ All other work - Pay in month effort expended

- ◆ Example: Research on Project X done in May; Add to May

NSF 2/9 Rule

- As a general policy, NSF limits the salary compensation requested in the proposal budget for senior personnel to no more than two months of their regular salary in any one year. It is the organization's responsibility to define and consistently apply the term "year", and to specify this definition in the budget justification.
 - NC State defines this as 8/16/2023 – 8/15/2024
 - Fall 2023 and Spring 2024 on Form - Must enter Amount

- Under normal rebudgeting authority, as described in Chapters VII and X, a grantee can internally approve an increase or decrease in person months devoted to the project after an award is made, even if doing so results in salary support for senior personnel exceeding the two month salary policy. No prior approval from NSF is necessary as long as that change would not cause the objectives or scope of the project to change. NSF prior approval is necessary if the objectives or scope of the project change.

NIH Salary Cap

FY 2024 Awards Issued	
October 1, 2023 through December 31, 2023 (Executive Level II)	\$212,100
January 1, 2024 through September 30, 2024 (Executive Level II)	\$221,900
FY 2023 Awards Issued	
October 1, 2022 through December 31, 2022 (Executive Level II)	\$203,700
January 1, 2023 through September 30, 2023 (Executive Level II)	\$212,100
FY 2022 Awards Issued	
October 1, 2021 through January 1, 2022 (Executive Level II)	\$199,300
January 2, 2022 through September 30, 2022 (Executive Level II)	\$203,700

[Salary Cap Summary \(FY1990 – Present\)](#)

NIH Salary Cap

- Effective January 1, 2024
 - Annual - \$221,900
 - Monthly - \$18,491
 - ½ Month - \$9,245

- If award issued AND adequate funds available, may rebudget for higher cap

- Must pro-rate for % effort if less than 100%

- May use a cost sharing account (non L5) to make up differential

NIH Salary Cap - Example 1 - 100%

Requested

Faculty 9 month base + supplements salary = \$180,000

Faculty monthly salary = \$20,000 ($\$180,000/9$)

2.7 months of 9 month salary at **100% effort** = \$54,000 ($\$20,000 * 2.7$)

Allowed

NIH Annual 12 month Salary Cap = \$221,900

Monthly Salary Cap = \$18,491 ($\$221,900/12$)

2.7 months of 12 months at **100% effort** = \$49,925 ($\$18,491 * 2.7$)

Unallowable = \$4,075 ($\$54,000 - \$49,925$)

NIH Salary Cap - Example 2 - 80%

Requested

Faculty **9 month** base + supplements salary = \$180,000

Faculty monthly salary = **\$20,000** (\$180,000/9)

2.7 months of 9 month salary at **80% effort** = \$43,200 ($\$20,000 * 2.7 * 0.8$)

Allowed

NIH Annual **12 month** Salary Cap = \$221,900

Monthly Salary Cap = **\$18,491** ($\$221,900/12$)

2.7 months of 12 months at **80% effort** = \$39,940 ($\$18,491 * 2.7 * 0.8$)

Unallowable = \$3,260 ($\$43,200 - \$39,940$)

Ledger 5 - Budget and Travel Check

- Ledger 5 expenditures **require** agency approval. 2 Options:
 - Already included in awarded budget or
 - Submit Project Modification Request (PMR) – wait for approval **PRIOR** to entering action

- Budget and travel check verification to be completed by Research Accountant during review of request by the faculty member

Ledger 5 - Warnings

- If more than >90% of the monthly pay requested is on L5 Projects it requires a monitoring plan and Dean's approval (May & August ½ month, June & July full month)
 - Must be cleared unless there is approved monitoring plan in place for effort and pay on the L5 project – no other activities allowed
 - Expectation this is RARE (None in Summer 2023)

- NSF 2/9's Rule - If more than 2/9 allowed by NSF, use button on ACRF to clear the error

- NIH Cap - Must be addressed; Cannot move forward with warning

Earning greater than 33.33%

- An employee may request an exception to earn greater than 33.33% of their annual base salary, when no portion of the salary will be paid from L5 funds. This exception requires Dean's approval.
- An employee may **not** receive more than 33.33% of their annual base salary when **any** portion of the salary will be paid from L5 funds. **No exceptions can or will be made.**



**Resolve issues
BEFORE advancing
the Forms or Action!**

Thank you!

DocuSign

All Initials and Signatures must be captured in DocuSign:

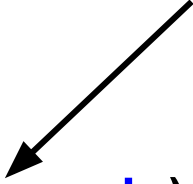
1. Employee
2. Responsible PI (signature needed on line if not employee)
3. Research Accountant (only if L5 projects on form)
4. Department Business Manager
5. Department Head (only if Monitoring plan required)
6. Assistant Dean of OFBM (if action needs to go to Dean)
7. Dean (if required)

When does the Dean need to sign?

→ Dean's Signature Required under the following 3 circumstances:

- Exception if total salary exceeds 33.33%. **NO** exception will be approved if any portion of salary on a ledger 5 project
- >90% effort on ledger 5 in a single month (pay period)
- Payment of summer salary after 09/30/24

→ DocuSign Routing - Use Unity Emails!

- Assistant Dean of OFBM - Initial - Amanda Savas (aljohn23@ncsu.edu)
 - Dean - Signature - Lewis Owen (laowen2@ncsu.edu)
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Additional Compensation System

- HR Partner will enter and submit
- Approval Routing when L5 Project involved:
 - Departmental (Supervisor, Department Head)
 - Research Office (CRO Post-Award Accountant)
 - Business Office (Director of Research Admin or Assistant Dean for OFBM)
 - University HR

▼ **Current Status: Approved** View/Hide Comments

Approval Path

<div style="background-color: #e6f2ff; padding: 2px;">Approved</div> <div style="padding: 2px;"> Gavin Williams Additional Pay Dept 05/30/23 - 8:38 AM </div>	→	<div style="background-color: #e6f2ff; padding: 2px;">Approved</div> <div style="padding: 2px;"> Veronica Morrison Additional Pay ResOfc 06/04/23 - 5:23 PM </div>	→	<div style="background-color: #e6f2ff; padding: 2px;">Approved</div> <div style="padding: 2px;"> Meghan Kerr Additional pay BusOfc 06/11/23 - 9:41 AM </div>	→	<div style="background-color: #e6f2ff; padding: 2px;">Approved</div> <div style="padding: 2px;"> Emily Millican Additional Pay HREPA 06/13/23 - 10:28 AM </div>
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▼ **Comments**

Amanda Savas at 06/08/23 - 7:57 PM
769349 Approved

Additional Compensation System

- Approval Routing when no L5 Projects involved:
- Departmental (Supervisor, Department Head)
 - Business Office (Director of Research Admin or Assistant Dean for OFBM)
 - University HR



- Actions can be initiated from outside our College that involve our faculty. These actions require approval from their home supervisor (a COS Department Head) as well as the COS Business Office

Documentation

- For **EVERY** action - Attach ACRF, Attestation, Monitoring Plan (if applicable)
 - Upload as one PDF document to Additional Comp Action

- If the ACRF is updated, please make sure to update the version number at the top, and that the correct version is attached to the action

Active Queue Report

- **Initiator's responsibility (HRS)** to ensure actions are approved at each stage by the applicable deadline. If they were not approved all the way through, the HRS needs to inform the faculty their pay will be delayed a month
- Initiator shall run active queue report, determine status of actions and follow up with approvers as deadlines approach. **Let's run it together!**

MyPack Portal >> Human Resources Systems >> NCSU Administration >>
Additional Compensation >> Additional Compensation Rpts >>
Active Queue Report

Deadlines

College of Sciences Summer 2024 Additional Compensation Deadlines

ACRF, ATTESTATION, AND MONITORING PLAN DEADLINES

NOTE: While there are due dates below, it is the expectation that work will occur on a rolling basis. R-A's will review faculty's requests as they are submitted and not wait to approve them until the 4/12/24 deadline. When that review is complete and approval is granted, the academic departments will fill out the ACRF and route for signature in DocuSign as soon as possible, but by 4/19/24 to ensure there is time for entry and approval in the Additional Compensation System

	Begin Date	Due Date	Note
Faculty fill out Summer Salary Request Intake Form for entire summer	02/22/24	03/15/24	Faculty have 3 weeks to fill out form including spring break
R-A Review of L5 Summer Salary Requests	02/22/24	04/12/24	R-A completes on rolling basis as faculty submit so Departments can fill out ACRF and route in DocuSign
Departments fill out ACRF/Route in DocuSign	02/22/24	04/19/24	Provide 1 week beyond April 12 in case errors are detected when form completed that need to be resolved
Faculty submit Changes or Additions	02/22/24	08/15/24	Form will no longer accept responses after 08/15/24

ADDITIONAL COMPENSATION SYSTEM DEADLINES

Work Performance Period	Month	Date Action must be entered in the Additional Compensation System and approved by Department Head	Date College Approval Must Be Complete at the both the Research Office and Business Office Levels (1)	Payroll Date (2)
05/16/24 - 05/31/24	May (1/2 month)	05/01/24	05/10/24	05/31/24
06/01/24 - 06/30/24	June (full month) - EARLY LOCKOUT	05/24/24 (BEFORE MEMORIAL DAY)	06/05/24	06/28/24
07/01/24 - 07/31/24	July (full month)	07/01/24	07/10/24	07/31/24
08/01/24 - 08/15/24	August (1/2 month)	08/01/24	08/12/24	08/30/24

Tips, Recommendations, Reminders!

ACRF

- Form should capture entire summer's activity
- Base salary calculations are based on the FY24 salary and supplements that qualify. Amounts earned after July 1 will not be adjusted due to salary increases
- If there is a work start and end date, there should be \$ in the month column(s)
- If there is an amount in a specific month, it should be within the work start and end dates
- No cents, round down, whole dollars only
- Ensure description of work is detailed

Additional Compensation System

- Ensure dates on form MATCH dates in system!
- Actions should be entered month by month (enter May for May payments due only). COS discourages entering for future months to minimize corrections
- **Don't wait until the week of the deadline to enter all actions for that month. High volume; quick turnaround needed!**

Questions