Guide to Paying Grant Funded Employees

As of March 2015

Our Mission:

The Office of Research and Sponsored Programs (ORSP) exists to help faculty and staff apply for and secure external funds in support of their creative ideas and professional interests. The office provides guidance, information, and technical assistance to faculty engaged in externally funded research, instruction, community service and other scholarly activity. In accomplishing this mission, ORSP ensures accountability, compliance and stewardship for sponsored programs as directed by the values of our campus and by all applicable Federal, State, and University policies, procedures and regulations.

ORSP is a full service department that is knowledgeable in all phases of pre- and post-award policies and procedures and available to assist during the entire life of the project. Assistance is available from the conceptual development of a project, to identifying potential funding sources, writing and submitting a proposal, developing the budget and identifying any cost share, negotiating an award, implementing and managing an awarded project, monitoring for CSUEB and sponsor compliance, and ending with overseeing all requirements for the official close of a project. ORSP belongs to a network of various university divisions and departments (including the CSUEB Foundation), who work together as a team to deliver exceptional service to any individual or group pursuing external funding.

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BACKGROUND

The Office of Research and Sponsored Program’s (ORSP’s) Quick Access Hiring Guide provides information on factors to be considered when determining how to hire people to work on grant funded projects or programs (see http://www20.csueastbay.edu/orsp/forms-policies-procedures/quick-access-guides.html). The information below is intended to clarify how to pay employees working on grant funded projects after they have been hired. The methods for generating pay depend on the type of employment and any requirements that are unique to the individual grant. Thus, the information is a general rule but will not apply to all scenarios.

EMPLOYMENT CATEGORIES AND DEFINITIONS

For the purpose of this document, employment types can be categorized as follows:

(1) Contractors
This category includes independent contractors on either short-term or long-term contracts. It also includes people who are employed by another organization and are employed on a grant to perform grant-related work via a Memorandum of Understanding (MOU) or contract.

(2) Hourly Employees
This category includes student workers, non-management staff hired and funded solely to work on grant funded projects where there is no set schedule (typically hired as a casual worker), and non-exempt university employees/staff who are also paid for work on grants through a temporary appointment (i.e. staff represented by a bargaining unit who are subject to provisions in the collective bargaining agreement surrounding work hours).

(3) Students Receiving Scholarships
This category includes payments to students for participation in a program. It is for students who are not designated as employees because they are not providing a service to the university and their work is not directed by others at the university.

(4) Full-Time Grant Funded Staff
This category includes staff hired as a university employee in a regular position or as a temporary worker on a set schedule.
(5) Faculty on Release

This category includes faculty that have been ‘bought out’ from teaching one or more courses.

(6) Faculty on Overload

This category includes faculty being paid for work in excess of a full-time teaching load.

(7) Lecturers and/or Staff on Overload

This category covers those hired as special consultants on grants. It includes lecturers paid for additional time to work on a grant funded project, exempt staff (i.e. hours not limited by provisions in a collective bargaining agreement), and Management Personnel Professionals (MPPs).

Please see details below for generating payments to each of these categories of grant funded workers.

PAYMENT OF CONTRACTORS

When an independent contractor is initially hired on either a short-term or long-term contract, a vendor data record (VDR) and a purchase order (PO) are created. To be paid, the contractor submits an invoice to the university in accordance with the agreement and scope of work that accompanies the contract. The PI reviews the invoice for accuracy, signs it, and submits it to ORSP for approval and payment. After reviewing, ORSP sends the invoice to Accounts Payable for the issuance of payment.

If the person to be paid is employed by another organization and that organization will be paying the employee for work performed on a grant per a Memorandum of Understanding (MOU) or contract, the organization will submit the invoice.
PAYMENT OF HOURLY EMPLOYEES

This category includes student workers, non-management staff hired and funded solely to work on grant funded projects where there is no set schedule (typically hired as a casual worker), and non-exempt university employees/staff who are also paid for work on grants through a temporary appointment (i.e. staff represented by a bargaining unit who are subject to provisions in the collective bargaining agreement surrounding work hours).

Employees in this category are to submit their hours via MyCSUEB. After getting through the hiring process, an eSARF must be submitted by the PI if they do not already have management access to review hours in MyCSUEB. The information needed for the eSARF will come from the chartfield string assigned when the grant is awarded. Here is an example of a chartfield string:

<table>
<thead>
<tr>
<th>Project Title</th>
<th>PeopleSoft Fund</th>
<th>PeopleSoft Dept ID</th>
<th>PeopleSoft Project ID</th>
<th>IDC %</th>
<th>Project Start &amp; End Dates</th>
<th>PI Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample</td>
<td>W????</td>
<td>?????</td>
<td>W??????</td>
<td>% TDC</td>
<td>12/1/14-5/31/15</td>
<td>Jane Doe</td>
</tr>
</tbody>
</table>

The link to the online form for the eSARF is located in the upper right hand corner of the staff page on the main CSUEB website. If you click on the eSARF link, you will be prompted to log-in. Once you log-in, there will be an online form. Answer the prompts as follows:

1. “Employee is”.... Select “Same Job Change Access”
2. Add your Net ID and phone
3. “Job duties” ... Write “Need to see hours, absences and vacation for grant employees”
4. “Need Access to Dept. ID” ... Add information from your grant’s chartfield string (see above)
5. “Affiliation”...Add your affiliation with the University
6. “Net ID of Employer MPP”...Add whomever the MPP is that you report to
7. “Make access similar to”... Select “No One”
8. “Application employee should have access to”...Select “Time and Labor”
9. “Send SARF to”...Add “Joanne.hill@csueastbay.edu”
Once the eSARF is approved by Joanne Hill, she will send the request to IT. IT will make sure that you have completed required security training. If you have completed training, you will be granted access. If you need training, you will get a message regarding what trainings are needed (typically FERPA training regarding privacy rules). Once IT verifies that your training is complete, you will be able to see hours, vacation and/or sick leave reported by grant funded staff when you log into MyCSUEB and click the manager tab at the top (near tab for BlackBoard). Instructions (including screenshots) regarding how to navigate the management system are available at:


Hourly staff and students are paid twice per month. All other employees are paid once per month. Payroll will send the PI monthly notifications when he/she needs to approve any reported absences (vacation or sick leave). If the PI does not take action in a timely manner (i.e. before the payroll date), the Payroll technician will contact the PI’s department. It is critical that this be avoided. PIs may wish to set reminders on their electronic calendars. Payroll dates can be found at .

http://www20.csueastbay.edu/af/departments/hr/payroll/Calendars.html. Dates for the first half of the 2015 calendar year are as follows:

March 16, 2015 (hourly employees only)
March 30, 2015
April 15, 2015 (hourly employees only)
April 30, 2015

May 15, 2015 (hourly employees only)
May 29, 2015

June 15, 2015 (hourly employees only)
June 30, 2015

PAYMENT OF STUDENTS RECEIVING SCHOLARSHIPS

This category includes payments to students for participation in a program. It is for students who were not designated as employees because they are not providing a service to the university and their work is not directed by others at the university. Please
work with ORSP staff on the process for these payments as the process will be specific to the fund source. No general rule applies.

PAYMENT OF FULL-TIME GRANT FUNDED STAFF

This category includes staff hired as a university employee in a regular position or as a temporary worker on a set schedule. The process for PIs to get access to payroll information for this category of employees is the same as that noted above for hourly workers. For this category, however, specific hours are not being approved. Staff will only be noting, and PIs will only be approving, vacation and sick leave on a monthly basis (i.e. exceptions).

PAYMENT OF FACULTY ON RELEASE

During the hiring process, a Faculty Release Time Form should have been submitted to ORSP. ORSP maintains a spreadsheet that includes the chartfield string for payment from the grant. The spreadsheet is submitted by ORSP to Donna Arredondo in Accounting to track faculty on release.

No other paperwork is needed to generate payment to the department or the faculty member. Initially, payments are made to faculty from their home department’s budget. Accounting processes a journal entry to reimburse the department budget on a quarterly basis for the portion of costs that were attributable to grant work. Thus, the ledger should show the payment of workers in this category along with all other payroll actions at the beginning of the next month.

PAYMENT OF FACULTY ON OVERLOAD

During the hiring process, Kathy Dulkie in Academic Affairs determines that faculty paid as a special consultant can be paid each month based on the days available to be paid for overload. A master spreadsheet is sent to ORSP and Payroll each month with the chartfield codes to be billed.

To generate payment, the PI must submit a Special Consultant Payment Request Form to Dulkie at the end of each month that the PI is to be paid overload. Forms must be received the morning of the fifth day of the month in order for the faculty member to be
PAYMENT OF LECTURERS AND/OR STAFF ON OVERLOAD

During the hiring process, an eFAF is submitted and approved for lecturers hired as special consultants on grants and an eSAF is submitted for exempt staff (i.e. hours not limited by provisions in a collective bargaining agreement) and MPPs. Joe Andrews of Accounting should be notified by the PI via email and provided the chartfield string for payment from the grant. This allows payroll to charge salaries to the correct funding source (department budget and/or grant account).

To generate payment, Special Consultant Payment Request Forms must be submitted to Kathy Dulkie of Academic Affairs at the end of each month that the consultant is to be paid overload. The amount will be paid on the 15th of the month.

Payments are charged directly to the grant. Thus, the ledger should show the payment of workers in this category along with all other payroll actions at the beginning of the next month.