Form SR-1 - Summer Recontracting Form

INTRODUCTION

IMPORTANT ITEMS TO NOTE!!

1. Complete the form online. Do not print a blank form and handwrite. The form has auto-calculations.
2. Start at the Submission Date field in the upper left corner. After completing a field, tab through and it will automatically go to the next field requiring input. If you hit enter, it will take you to a random field and then you need to click on the cell you wish to enter information.
3. Only fields requiring input are available for entry. The rest of the form is password protected from entry or change.
4. Fields that require input have popup instructions that appear once you tab into that cell.

ONLY USE FOR 9-MONTH FACULTY/LECTURERS

1. 9-month faculty/lecturers should only receive summer compensation using this form except for compensation through CCE and UC. Do not use an IP-1.
2. Use only job codes 5276 and 5277 for 9-month faculty summer compensation, except for compensation through CCE and UC. Do not use 5245.
3. Job codes 5276 and 5277 CANNOT be used on the same form. Use a separate form for each job code.
INSTRUCTIONS TO COMPLETE FORM

1. **Upper left corner**: Submission Date – enter the date the form is being prepared and press tab. This date must be at least two weeks prior to the begin date of the contract in Job Data section of this form. If this date is less than two weeks from the begin date of the contract, a memo of explanation for the late submission MUST accompany the SR-1 form.

2. **Upper right corner**: Enter a 4-digit numerical code followed by a capital letter and press tab. This can be whatever you choose. The 0 preceding this will be replaced by the 4-digit home department code when that field is completed later. This becomes the form number in the event multiple forms are generated for the same person. It provides a unique identifier.

3. **Provost Memos**: To access the Provost Memos regarding summer recontracting, click on the hyperlink. A window will open on the Provost website. Three links are listed: (1) The memo sent to faculty, department chairs and deans, (2) the memo explaining the process and (3) a form to request 33% summer recontracting. If a faculty member wishes to receive 3 months of summer recontracting (33% of their 9-month salary), this form MUST accompany the SR-1 form. See #4a below for more instructions.

4. **Information Section (Purple)**:
   a. **Salary** – input the faculty/lecturer’s 9-month salary and press tab. No need to put a $ sign or comma. Salary must be in whole numbers, no decimals. For example, if the salary is $86,548, then input 86548. It will automatically add the $ sign and the comma. Notice that the next 3 salary amounts populate automatically. This is for information purposes only. If the faculty member wishes to summer recontract for 3 months, the 33% request form MUST accompany the SR-1 form. This form can be found on the Provost website by clicking on the hyperlink as noted in #3 above OR on the 33% tab in the same file as this form. This form will automatically populate once you have completed the form. Faculty are NOT allowed to receive 33% compensation IF they answer YES to any questions in the following section.
   b. **Questions** – answer YES or NO to each of the following 4 questions using the pull down arrow. If YES, tab once. If NO, tab twice.
      i. **If the answer was YES**, enter the amount of compensation being received for this service. No need to put a $ sign or comma. Salary must be in whole numbers, no decimals. For example, if the compensation amount is $4,875, then input 4875. It will automatically add the $ sign and the comma. Tab once to answer the next question.
      ii. **If the answer was NO**, leave the compensation field blank for that question and answer the next question.

5. **Job Data Section (Green)**:
   a. **Last Name** – enter last name of faculty member receiving summer salary and press tab
   b. **First Name** – enter first name of faculty member receiving summer salary and press tab
   c. **URI Employee Department Name** – enter the full and complete name of faculty member’s home department and press tab
d. **Home Dept. Code** – enter the 4-digit home department code of the faculty member and press tab. This is NOT the 4-digit department code of where the work is being performed. It is the 4-digit department code where the faculty member’s position resides.

e. **Begin Date of Contract** – click on the drop down arrow, select a date and press tab. The box will automatically fill. These dates coincide with the beginning of the pay periods available for summer recontracting. No other dates are permissible.

f. **End Date of Contract** – click on the drop down arrow, select a date and press tab. The box will automatically fill. These dates coincide with the end of the pay periods available for summer recontracting. No other dates are permissible.

g. **Employee ID#** - enter the faculty member’s employee ID# and press tab. If unknown, use the instructions in Appendix I following these instructions to access the employee ID# in PeopleSoft HR.

h. **Record #** - to be completed by hand after job is entered into PeopleSoft

i. **Contract Amount** – enter the amount of dollars faculty member will be paid for the contract period and press tab. This amount must be in whole numbers, no decimals. Do not enter a $ sign or comma. If you need to determine the faculty member’s salary, use the instructions in Appendix I.

j. **Work to be Performed** – click on drop-down arrow, select an item from the list and press tab. The box will automatically fill. This selection must match the selection in the Job Code field in k. below.

k. **Job Code** – click on drop-down arrow, select an item from the list and press tab. The box will automatically fill. This selection must match the selection in the Work to be Performed field in j. above.

l. **Supervisor’s Name** – enter the name of the faculty member’s supervisor and press tab

m. **Additional Information** – This is a free form field. If an Academic Unit requires additional information about the work being performed, enter the information here. Otherwise, this can be left blank. Press tab.

6. **Salary Distribution Data Section (Blue):**

   a. **Begin Date** – click on the drop down arrow, select a date and press tab. The box will automatically fill. These dates coincide with the beginning of the pay periods available for summer recontracting. No other dates are permissible. This date must be equal to or after the date selected in 5e. above.

   b. **End Date** – click on the drop down arrow, select a date and press tab. The box will automatically fill. These dates coincide with the end of the pay periods available for summer recontracting. No other dates are permissible. This date must be equal to or before the date selected in 5f. above.

   c. **Chartfield String** – the account(s) to which the contract dollars will be charged. More than one may be listed. This is provided by the faculty member.

      i. **Fund** – enter the fund type and press tab - 3 digits (100, 101, 110, 401 or 500)

      ii. **Dept** – enter the 4 digit department code and press tab
iii. Program – enter the 4 digit program code and press tab (may be all zeros depending on chartfield string)

iv. Project – enter the 7 digit project code, if applicable, and press tab (required for Fund 500, may apply to other fund types if being used as a match account)

d. Amount – enter the amount of dollars to be charged to each chartfield string listed and press tab. Do not enter $ sign or comma. This MUST be in whole dollars, no decimals. This will automatically sum below and the total MUST equal the contract amount entered in 5i. above.

e. % of Contract Amount - this will automatically calculate. It represents the amount of dollars in that row divided by the contract amount entered in 5i. above. For each range of dates, the % of Contract Amount should total 100%.

f. Project End Date – enter the project end date for each Fund 500 chartfield string and press tab. If not provided by the faculty member, this may be obtained using the instructions in Appendix II following these instructions.

g. If applicable, continue to enter additional information in the Salary Distribution Data using the instructions in this section 6.

7. Required Signatures:

   a. Employee – obtain faculty member’s signature
   b. Department Chairperson – obtain department Chairperson’s signature
   c. Other – available for any other signature approvals required by the academic unit, may be left blank if not required by academic unit
   d. Dean’s Office – obtain Dean’s Office signature

8. 33% waiver form – is required for faculty who are receiving 3 months of summer salary. It is located on the 3rd tab of the Excel document containing the form and is automatically completed when the SR-1 form information is completed. If the SR-1 form does not result in 3 months of summer recontracting, do not submit the 33% waiver form. If previous SR-1 forms have been submitted and the current SR-1 form is bringing the faculty member to 33%, complete the 33% form with the information from all SR-1 forms submitted for the summer and submit with the current SR-1 form.

   a. Print form
   b. Faculty member signs
   c. Attach to SR-1 form and submit to Dean’s Office with form

9. Job may be entered into PeopleSoft once all signatures have been obtained according to the instructions provided by the PeopleSoft training team.

10. Remind faculty about direct deposit in PeopleSoft.
Appendix I – Employee’s ID# and Salary

An employee’s ID# and salary can be found in Peoplesoft Human Resources by running the URI Department Employee List:

1. Login to Peoplesoft HR
2. Click on Workforce Administration
3. Click on URI Human Resources Reports
4. Click on URI Department Employee List
5. Click on Search
6. Click on Run Control ID
7. Enter 4-digit department code
8. Click on Run
9. Click on OK
10. Click on Process Monitor
11. Click Refresh every 10 seconds until Run Status changes to Success and Distribution Status changes to Posted
12. Click on Details link
13. Click on View Log/Trace link
14. Click on pdf link in the File List section
15. This returns a list of employees in your department. Print for further reference
Appendix II - Grant/Project End Date

To find the end date of a grant or project:

a. Login to Peoplesoft HR
b. Click on Set Up HRMS
c. Click on Commitment Accounting (under the Product Related Folder)
d. Click on URI Grant Effective Dates (under the URI Commit Accounting Reports Folder)
e. Click on Search
f. Click on Run Control ID link
g. Enter 4-digit department code
h. Click on Run
i. Click on OK
j. Click on Process Monitor
k. Click Refresh every 10 seconds until Run Status changes to Success and Distribution Status changes to Posted
l. Click on Details link
m. Click on View Log/Trace link
n. Click on pdf link in the File List section

This returns a list of grants/projects with their respective effective date and inactive date. The summer recontracting job can’t go beyond the inactive date.