



USER APPOINTMENT FORM FOR RF BUSINESS APPLICATIONS

Institute Business Office Staff

Complete this form to add, remove or change a user's responsibilities in RF Business Applications

Statement of Purpose: This form is used to obtain access to RFMH Business Applications. Users will be added after review and approval. If granted access, the user agrees to use the system only for approved business purposes. Use of systems or confidential data for other than approved business purposes will result in the revocation of system privileges.

DATE: _____

NAME: _____ TITLE: _____
Last Name, First Name, Middle Initial *Position Title*

INSTITUTE: 110 – NYPI DEPARTMENT: _____
210 – NKI
310 - IBR

WORK PHONE: _____ WORK EMAIL ADDRESS: _____

SUPERVISOR: _____
Name *Email address*

NEW USER Effective Date of System Access _____
ACCESS TERMINATION Effective Date of Access Termination _____
CHANGE TO RESPONSIBILITIES Effective Date(s) of Change _____ to _____
Include start and end date(s) as applicable

****Check responsibilities or type of access being granted below as applicable. Detail of each responsibility is listed on page 2. ****

<u>AP/PO</u>	<u>FTASK</u>	<u>HR/Payroll</u>
ORG Payables Inquiry	110, 210 or 310 FTASK – Full Version	110, 210 or 310 Benefits Inquiry
ORG Purchasing End User**	110, 210 or 310 FTASK – No Payroll	110, 210 or 310 HRMS End User
ORG Purchasing Inquiry		110, 210, or 310 HRMS Inquiry
	<u>Grants</u>	110, 210, or 310 LD End User
** NOTE: Add buyer	ORG Grants Inquiry	<u>Oracle Time and Labor</u>
	ORG Receivables Inquiry	110, 210 or 310 OTL Location Timekeeper
	RFMH InfoEd Authorization	110, 210 or 310 OTL Time Review
	RFMH Project Signature Authorization	RF OTL Supervisor Approvals
		Self Service Time

Comments:

_____/_____/_____
Business Office Signature / *Date*

_____/_____/_____
Deputy Director for Administration Signature / *Date*

ORACLE INPUT

USER ID: _____ CREATED BY: _____ DATE: _____

Detail of Responsibilities

<i>AP/PO/GL</i>	
ORG Payables Inquiry	Allows user to view info on payments, invoices and suppliers at a specific location.
ORG Purchasing End User	Allows user to enter and maintain PO's, requisitions and supplier item catalog at a specific location
ORG Purchasing Inquiry	Allows user to view information pertaining to purchase orders, requisitions, and suppliers at a specific location.

<i>FTask</i>	
FTask – Full Version	User has access to information on award budgets and expenditures including payroll.
FTask – No Payroll	Same as FTASK – Full without payroll details.

<i>Grants</i>	
ORG Grants Inquiry	Allows user to view specific info on all Awards/Projects/Tasks. Includes Award/Project budgets, expenditures and encumbrances for a specific location
ORG Receivables Inquiry	Allows user to view info on receipts and remittances on all grants.
RFMH InfoEd Authorization	Allows user to enter and maintain access to the RFMH InfoEd application.
RFMH Project Signature Authorization Form	Allows user to enter and maintain signature authorization for projects.

<i>HR/Payroll</i>	
110, 210, 310 Benefits Inquiry	Allows user to view benefit info.
110, 210, 310 HRMS End User	Allows user to maintain and view HR and payroll info including Labor Schedules at a specific location.
110, 210, 310 HRMS Inquiry	Allows user to view info about all employees including salary, date of birth, SS#, etc. for a specific location.
110, 210, 310 LD End User	Allows user to enter and maintain labor schedules and process distribution adjustments for a specific location.

<i>Oracle Time and Labor</i>	
110, 210, 310 OTL Location Timekeeper	Location specific timesheet creation/modification and review
110, 210, 310 OTL Time Review	Location specific view only timesheet review
RF OTL Supervisor Approvals	Supervisor timesheet review and approval
Self Service Time	Employee timesheet entry and review

RESEARCH FOUNDATION FOR MENTAL HYGIENE, INC.

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Robert E. Burke, CPA
Managing Director

To: New Supervisor
From: Theresa Conlin, Director of Human Resources (HR)
Subject: Supervisor Responsibilities

Thank you for agreeing to act as supervisor to an RFMH employee. In this role you will have certain responsibilities to RFMH and to the employee you are supervising. By signing the attached form you acknowledge that you will carry-out the following responsibilities as supervisor;

- 1) Understand RFMH Policies as contained in our Employee Handbook,
- 2) Ensure the employee has a clean and safe workplace and notify RFMH HR of any concerns,
- 3) Direct the employee in their day to day duties,
- 4) Perform a periodic written review (at least annually and more frequently if needed due to performance issues) of employees performance and provide copies to RFMH HR for their personnel file,
- 5) Ensure the employee completes time and attendance records in a timely manner (within 3 business days after the end of a pay period),
- 6) Approve employee time and attendance records in a timely manner (within 3 days of receipt from employee)
- 7) Approve and keep record of employees requests for time off,
- 8) Keep track of employee accrual balances,
- 9) Notify RFMH HR immediately if an employee is hurt at work,
- 10) Notify RFMH HR immediately if an employee is out for five (5) consecutive days due to their illness or the illness of a family member,
- 11) Notify RFMH HR immediately if an employee is close to exhausting accrual balances and may need to go on leave without pay,
- 12) Notify RFMH HR immediately if the employee has resigned or requested a reduction in effort,
- 13) Consult with RFMH HR before changing any work locations or making accommodations for the employee.

Someone from my office will reach out to you to train you on the use of the RFMH Time and Attendance System. If you have any questions regarding these responsibilities please feel free to call me to discuss. Also, if for some reason you are unable to carry-out these responsibilities we would ask that you call.

