



RESEARCH AND SPONSORED PROGRAMS

Office of the Vice Chancellor for Research and Graduate Education

Salary Funding Projection Tool

Purpose

As part of the conversion to a biweekly payroll process, campus requires tools to better predict salary and stipend payments charged to sponsored grants, contracts, fellowships and training grants. This tool is a necessary component of campus guidance being developed to standardize the administrative processes and procedures for impacted sponsored projects.

Use of this tool allows for timely and accurate administration of sponsored project financial reporting and closeout, including support for budgeting, cost projection and trainee/fellow stipend and/or salary auditing.

Tool functionality

The tool will help users understand the totality of the funding summary for an employee across their entire appointment period relative to the information entered by the user. The information provided by this tool is for planning purposes only. Data entered by users does not impact nor update HRS or any other campus system. To make any payroll changes, contact your HR department and/or make the change in HRS.

A user will provide various criteria about an individual employee (including selecting the employee, pay basis, annual pay, and desired calculation range). For the indicated calculation range, the user will provide at least one funding source. The user can indicate a number of funding splits by percentage and may also change the funding splits by adding a new “funding as of” section.

Results will be displayed in three sections:

Section 1: Display of high level criteria previously entered (employee, pay basis, annual pay, start/end date range, job record).

Section 2: Referred to as the funding summary section, this will display the sum of the amount paid by each funding string used across the entire time period. A percentage of total payroll amount will also be calculated for each unique funding string.

Section 3: Referred to as the funding detail section, this will display details of the funding split for each payroll period that falls within the requested time period. For each payroll the amount and percentage of the total payroll will be displayed for each funding string that will be used for that particular two week time period.

The results page will also include an option to export the results in Excel and PDF.

Search Field Information and Definitions:

- Pay Basis: The drop down provides the following pay basis codes: Academic, Annual, Summer Service and Summer Session. For more information on Pay Basis, please visit [Pay Basis Descriptions in HRS](#).
- Comp (Compensation) Rate: This field represents the rate of pay assigned to an employee. This is the full-time, annual or academic rate of pay an employee receives, not the actual amount received.

Please note, the tool is limited to calculating based on a single compensation rate. It is unable to perform a calculation based on multiple compensation rate changes over time. If a user needs to project funding based on a comp rate that is different from the initial comp rate of an employee's appointment, they must perform a new search with the updated compensation rate.

- FTE (Full-Time Equivalent): The amount of hours budgeted for a position shown as a percentage. A position budgeted for 80 hours in a bi-weekly pay period would be 1 FTE; a position budgeted for 40 hours in a bi-weekly pay period would be .5 FTE. Users will need to provide the FTE as a percentage in the tool.
- Start Date/End Date: The Start Date and End Date fields equal the start and end date of projection in the tool. Projected dates are determined by the user. Examples include but are not limited to:
 - start/end dates of an employee's appointment
 - start/end dates for trainee/fellow appointment that is terminating early (e.g. before end date stated in the appointment letter)
 - a sponsored project's budget period start and end dates associated with an employee's appointment, etc. The end date field can be adjusted for early terminations.
- Job Record (Empl Record): The job record identifies each job. Employees with multiple, concurrent jobs will have a unique record number for each job.

Steps for using the Salary/Stipend Output Tool and Export Features:

1. Access the Salary Funding Project Tool at <https://rsp.wisc.edu/apps/SFPT/>.
2. A page listing search options will open. The search options include Employee, Pay Basis, Comp Rate, FTE, Start/End Date, Job Record and Funding. Some fields are required for performing a search. Those fields will have the 'Required' designation.

Notes:

- Employee field:
 - This field is designed to be flexible and is purely provided as a point of reference for the search output.

- To search for a current employee's name, enter their last name and scroll the drop-down menu for the correct name.
 - You are not required to enter a name in this field if you do not have one. In this instance leave it blank.
 - If you would like to enter the name of a prospective employee so the output will reflect the name for record keeping purposes, you are able to do so. The gray box adjacent to the 'employee' field will read 'no match' and it will not interfere with a successful output.
 - Funding fields:
 - The "funding As Of" section represents a funding group. Be sure to enter the associated date along with the funding string.
 - Within a funding group, it is possible to include additional funding strings for an employee appointment with funding splits. For additional funding strings, use the green **'+Add Funding String'** button. Similarly, you can reset funding using the black **'⌵Reset Funding String'** button and/or remove a funding string using the  button.
 - Use the green **'+Add Funding Group'** button to adjust the funding allocation for a different effective date. Adjustments can be made for any date within the search criteria entered in the top section. Once the date is entered in the 'funding as of' section, be sure to include the required funding string and use the **'+Add Funding String'** button to add additional funding strings if necessary.
 - To remove a funding group, click the red **'- Remove Funding Group'** button.
 - Funding percentages must match across all funding groups for performing the search.
3. Once you input your search criteria, click the blue **'=Calculate'** button
- To clear your entire search, simply click the black **'⌵Reset All Fields'** button.
 - To adjust search parameters without having to re-enter all criteria, click the blue **'← Return to Funding'** button
4. The search output provides a Funding Summary and Funding Detail:
- Funding Summary: Using information provided in the search, the Funding Summary provides the total salary/stipend amount(s) and percentage for each identified funding string.
 - Funding Detail: Taking into account the total payroll amount, this section provides a breakdown of salary/stipend amounts and percentage for each identified funding string per bi-weekly pay period.
5. To export the search result information, you have two options:
- Click on the red **'Export to PDF'** button to download a PDF version of the search results. This is an ideal option for record keeping purposes.

- Click on the green **'Export to Excel'** button to download an excel file of the search results. This is an ideal option for performing additional calculations outside of what the tool provides.

Helpful Tips:

- For the tool to be useful, the user must enter accurate information in the search fields. The search output relies on what the user has entered in the search fields.
- What if I want to use the tool to forecast for a future appointment but the associated funding string is unavailable?
 - While the funding string is a required field, it is still possible to determine the salary/stipend amount. If the funding string is unavailable, you can enter another funding string in its place to determine the total salary/stipend amount. Just know it will not accurately reflect the funding string the amount will be charged to.

Other Resources

- [OHR Payroll Toolkit](#)
 - On this page, see links for:
 - Fellow/Trainee Adjustments
 - Calculator SGA Adjustments Tip Sheet
 - Fellow/Trainee Payments (Video)
 - Fellow/Trainee Payment Solution (Presentation Slides)