Changes to Projection Tool / Push Reports Output based on New Cost Share Project

Summary:

The current approach to Payroll Cost Share in the Projection Tool/Push Reports is to basically just ignore the salary dollars associated with effort on Payroll Cost Share G/L Accounts (e.g. 603400). We pick up the effort percentages for the effort gap reports but then ignore the associated payroll and fringe dollars on those specific g/l accounts.

With the new methodology associated with payroll cost share, we can no longer use this approach as the payroll cost share g/l accounts will be going away on November 1, 2019. So, we have modified the Projection Tool/Push Reports to utilize the new methodology. Below are the key differences you will see in the tool.

1. Effort associated with a specific project will be entered on just one g/l account
2. We will calculate payroll and fringe associated with that effort
3. We will then calculate what we believe cost share (payroll and fringe) will be based on DHHS Salary Caps and entries in the Other Salary Cost share tool on the Grants Management tab in Duke@Work. These dollars will be added to the projection tool on the line for Payroll Cost Share.
4. The payroll detail section at the bottom of the report will display the full payroll and fringe amount per person and then there will be a line for subtracting the payroll cost share amount (salary and fringe). If Cost Share is projected for an individual, there will be an X noted to the right of the individual’s name.

New view (where an employee has cost share projected)
How to add a new employee to a WBSE if you anticipate payroll cost share

Existing employee/ Unique ID known:

- Enter their monthly salary, you do not need to adjust for appointment type, we’ll know if they are a 9 or 12 month appointment based on their HR information.
- Enter their full % effort
- If their only cost share is associated with exceeding the DHHS Salary Cap, you need to do nothing else, we will calculate the correct cost share amount
- If you want to plan for “Other Salary Cost Share” then you’ll need to maintain the Other Cost Share tool appropriately – remember that this will cause actual cost share in the future as well. Other ways to handle this would be to put in manual adjustments in the non-payroll section.

Unique ID Unknown:

- Enter their monthly salary if 12 month appointment, but if it will be for someone with a likely 9 month appointment, you will need to adjust the monthly salary amount you enter to convert it to what it would be for a 12 month appointment. So, if their 9 month salary is $10,000/month, you would enter $13,333 ($10,000 / 9 x 12)
- Enter % effort expected for 12 month employee. For 9 month employee, enter an adjusted effort % to accommodate the 12 month salary: If you were going to enter 10% effort, you would enter 7.5% (10% / 12 x 9)
- If you want to plan for Other Payroll Cost Share, you will have to calculate that manually and enter a non-salary adjustment OR you can just adjust the % effort to reflect that level of effort that will stay on the grant after cost sharing. So if someone has 10% effort on the grant, and you plan to cost share off 50% of it, then enter 5% effort (10% x 50%).

You will see these changes reflect on the reports run starting November 1, 2019