Use the Salary Adjustments Function

1. From the *Single Fund Code Detail Projection Report*, click on the **Salary Adjustments** button to open a new window and review the important notes below:

   - The Salary Adjustments button **opens a new window** and allows you to make adjustments to the salary component of the projection, and to **easily move between the Detail Report and the Salary Adjustment window** to see the impact of the changes immediately.

   - In addition, **effort percentages used in the standard projection calculation may also be viewed** on this screen.

   - **The Non-Salary Adjustments window MUST BE CLOSED** in order to open the Salary Adjustments window from the Detail Report. Non-Salary Adjustments and Salary Adjustments windows cannot be open at once. If one is not closed when the other is opened, a message will display at the top of the report indicating data is locked and showing your own NetID. You will not be able to enter any adjustments in the input fields.

   - **If you lock the data, then simply close one of the open Adjustment windows to unlock the data.**

   - To avoid locking yourself if you are already in the Salary Adjustments screen, use the Non-Salary Adjustments button in the screen header which automatically closes the Salary Adjustments and opens the Non-Salary Adjustments.

   - **In addition, two Grant Managers cannot access the same Adjustment windows and input data at the same time.** The lock message will display at the top indicating the NetID of the person locking the data and to unlock the data, the other person must exit the Adjustment screen.
In the resulting Salary Adjustments window (see next several pages for all the sections of the Salary Adjustments window):

2. Review the information in the **Header** section about the Fund Code selected (same as the Header for the Single Fund Code Detail Projection Report)

3. Use the buttons available for performing functions within this report as outlined:
   - **Save** – use to save the salary adjustments that have been made.
   - **Clear** – use to clear all adjustments made during this session and reset to the original screen.
   - **Non-Salary Adjustments** – use to move to the Non-Salary Adjustments window for the cost object selected (will automatically close Salary Adjustments window).
   - **Recalculate** – click on this button to recalculate the summary sections and update for the changes made.

4. Review the **Staffing as of (prior Month)** section that shows everyone funded on the cost object per the cost distribution in the SAP R/3 system at the close of the previous fiscal period.
5. Use the **Salary Adjustments (by User)** section to make adjustments to effort of existing staff, as well as add new staff funding per any of the options in the next steps.

6. To *modify the future effort* of an employee:
   - Simply enter a percentage of effort for an employee in the projection period field in this section to override the existing cost distribution and change the effort percentage listed for the employee in the *Staffing as of (prior Month)* section.
   - Use 0 in the projection period fields for an employee to reflect that the employee’s effort is ending for the projection periods.
   - Leave a blank field in the Salary Adjustments section to indicate there is no change for the effort for a projection period; a blank field indicates the effort will default to and not change from what is listed in the *Staffing as of (Prior Month)* section.
   - Use the **Comments** field to add notes as needed.
   - Click on the **Recalculate** button and **Save** button as needed.

**Note:** *Changes made in this section WILL carry over to subsequent months until either the projection period is in the past or a change is made by the Grant Manager.*
7. To **add a new employee’s effort** to the grant in one of the projection periods and the **Duke Unique ID (DUID) is known**:
   - Click on the **Add Employee (ID Known)**
   - On the new line that appears in the Salary Adjustments section, enter the employee’s Duke Unique ID (DUID) or search, and find using the employee’s last name in the drop-down for the field
   - On the new line, continue and enter the **Salary, Cost Element (G/L Account)** and **Current % Effort** as appropriate in the projection period input fields.
   - Use the Comments field to add notes as needed.
   - To use this button specifically for **out of cycle**, enter 0s (zeros) in the appropriate projection period fields to change the previous effort and add a line for the employee with the new salary for the out of cycle – you must use a different Cost Element (G/L Account) than the original one listed in the section above and it doesn’t matter which salary G/L account is used as the only time it matters is for cost sharing.
   - To use this button specifically for **summer supplements**, enter the fields on the new line for the employee with the cost distribution/effort percentage of the supplement in the projection period fields as applicable. Payroll supplements are not included in the Projection tool and must be added as a Salary adjustment.
   - Note that Payroll changes done through iForms do not show up in the tool until the following month.
   - Note that Non-Compensatory Payroll (G/L Account 635200 – 635300 shows up in the actual payroll expenses; however, Non-Compensatory Projected Expenses must be added as a salary adjustment to the Trainee Expense line.
   - Click on the **Recalculate** button and **Save** button as needed.

8. To **add a new employee’s effort** to the grant in one of the projection periods and the **Duke Unique ID (DUID) is not known**:
   - Click on the **Add Employee (ID Unknown)** button to add an employee that is not known to the grant, for example, if you anticipate hiring someone, but do not yet know who that would be, like a post doc will be hired.
   - On the new line that appears in the Salary Adjustments section, enter a descriptor in the Employee Name field (e.g., new hire, post doc, grad student or TBD – to be determined),
   - On the new line, continue to enter the **Salary Type** (drop down for options – each represents a different fringe category), **Monthly Salary, Cost Element (G/L Account)** and **Current % Effort** as needed in the Projection period input fields.
9. When adding employees that have **cost shared salary** and **Duke Unique ID (DUID)** is known:
   - Enter the full % effort and the true monthly salary (salary actually paid per month and not adjusted for a 9-month or 12-month appointment (you do not need to make adjustments to the salary amount based on the appointment type as the system will know if the employee is a 9-month or 12-month salary based on HR information).
   - If their only cost share is associated with exceeding the DHHS Salary Cap, you need to do nothing else, the system 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.

10. When adding employees that have **cost shared salary** and **Duke Unique ID (DUID)** is 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%).
11. Use the **Salary Adjustments (Summary)** to view the effort that will be picked up for the Projection periods on the Detail Report.

12. Use the **Fringe Benefits** to view a summary of the fringe benefits that will be used on the Detail Report with totals.