

## Changes to the Funding Grid

Starting Monday, October 5, the funding grid allows you to enter funding by percent in addition to the current method of entering by dollar amount. Besides giving you another way to enter funding, this change allows payroll to be distributed more accurately to the appropriate accounts and it reduces data entry.

**Note:** *In the following cases, entering by dollar amount is still the preferred method:*

- *Faculty and staff who have supplements or stipends that equal a specific dollar amount, (for example, Ruth L. Kirschstein National Research Service Award (NRSA) stipends).*
- *Anyone who has a funding row assigned an RNF earning code (used for post-doc trainees who are exempt from FICA).*
- *For individuals whose salary is over the NIH salary cap.*

The change to the funding grid is made for all ePARs where the funding grid appears, including:

- Hire an Employee
- Edit Existing Job
- Add/Update Position
- Funding Swap
- Lump Sum Payment

## All Amounts or All Percentages

If you decide to enter a dollar amount for a funding source, you need to use dollar amounts for each row of funding on the funding grid. Likewise, if you choose to enter a percentage of the budgeted dollar amount for a funding source, you need to enter percentages for every row on that grid.

## New Total Field

For the position form, a new Allocated Budget Amount field allows you to enter the total budgeted for the position (you need to fill in this amount whether you are entering percentages or dollar amounts).

If you enter percentages, the system calculates the dollar amount based on the percentage you typed and the amount in the Allocated Budget Amount field, and fills in the Budget Amount field on the row with that amount.

If you choose to enter dollar amounts, the total of the dollar amounts needs to equal the allocated budget amount before you can go to the next page of the ePAR.

Allocated Budget Amount

\*Effective Date

Eff Sequence

Enter funding amounts either as dollars or percentages.

Basic Mode		Expanded Mode							
		Earnings Code	Budget Sequence	Budget Amount	Percent of Distribution	Combo Code	Combo Code Description	Fund	Source
1	<input type="button" value="+"/>	<input type="text"/>	1	\$48,000.000	80.000	000200814	20101-12001-512120-318300	20101	12001

New Total \$48,000.000      Percent 80.000      Unfunded Amount \$12,000.000     

## A New Reconcile Button

If you enter more than one row of funding, you can use the new Reconcile button to adjust any rounding issues that occur. When you click the button, the system adjusts the last row of fund to make the amount in the Unfunded Amount field equal \$0.

The Reconcile function changes the last funding row that appeared when you first navigated to the funding grid. If you sorted the rows, the original last row may no longer appear to be the last row.

New Total \$65,000.000      Percent 100.000      Unfunded Amount \$0.000     

Old Total \$60,000.000

## An Example Using the Add/Update Position ePAR

This example shows the new funding grid changes using the Add/Update Position ePAR:

1. Click on the **Expanded Mode** tab.
2. Do one of the following in the Allocated Budget Amount field:
  - If you need to make the budget amount for one of the rows on the funding grid a fixed amount, leave the Allocated Budget Amount field blank, and fill it in after you have completed all the rows on the funding grid.
  - Otherwise, enter the total budgeted for the position in the Allocated Budget Amount field.
3. Fill in the rows of the funding grid. Enter either percentages for all rows or dollar amounts for all rows, and fill in the rest of the fields as usual.

Results:

- If you enter a percent, the system calculates the budget amount for the row as soon as you press Tab to leave the field.

- The system updates the New Total, Percent, and Unfunded Amount fields as you enter or adjust budget amounts.

The screenshot displays a software interface for managing funding. At the top, the 'Allocated Budget Amount' is set to 60000.000. Below this, the 'Effective Date' is 09/07/2015 and the 'Eff Sequence' is 0. A note indicates that funding amounts should be entered as dollars or percentages. The main area features a table with columns for 'Budget Amount' and 'Percent of Distribution', which are highlighted with an orange box. The table contains one row with a budget amount of \$48,000.000 and a percentage of 80.000. At the bottom, summary statistics show a 'New Total' of \$48,000.000, a 'Percent' of 80.000, and an 'Unfunded Amount' of \$12,000.000. A 'Reconcile' button is also present.

	Earnings Code	Budget Sequence	Budget Amount	Percent of Distribution	Combo Code	Combo Code Description	Fund	Source
1		1	\$48,000.000	80.000	000200814	20101-12001-512120-318300	20101	12001

New Total \$48,000.000    Percent 80.000    Unfunded Amount \$12,000.000

- After all funding sources are entered and the Unfunded Amount is \$0, click on the **Next** button to continue completing the ePAR.

## An Example Using the Hire ePAR

This example shows how to use the enhanced funding grid on the Hire form:

- Click on the **Expanded Mode** tab.

Result: The funding grid appears with old and new budget and percentage columns.

- The **Old Budget Amount** column and the **Old Percentage of Distribution** column contain information based on the Allocated Budget Amount field if funding was stored on the position.
- The funding grid will be blank if you are using a new position with no stored funding information.

## Changes to the Funding Grid

Form Data

Annual Salary @ FTE1.0

\*Annual Rate:

Effective Date 09/14/2015

Eff Sequence 0

Budget Amount \$0.00

Basic Mode Expanded Mode

			Delete	Budget Sequence	Old Budget Amount	Old Percentage Of Distribution	Budget Amount	Percent of Distribution	Combo Code	Combo Code
1	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="checkbox"/>	1	\$48000.000	80.000		80.000	000200814	20101-1200
2	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="checkbox"/>	1	\$8399.400	13.999		13.999	000227884	25210-4900 5100065
3	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="checkbox"/>	1	\$3600.600	6.001		6.001	000238574	20101-1200 5100065

New Total \$0.000      Percent 100.000      Unfunded Amount \$0.000     

Old Total \$60,000.000

2. Do one of the following:

- If funding information exists and you want to keep the percentage of funding the same for each source, enter the dollar amount paid to the employee each year in the **Annual Rate** field first.

Form Data

Annual Salary @ FTE1.0  
Annual Rate:  62,000.00

Effective Date 09/14/2015 + -  
Eff Sequence 0

Budget Amount \$62,000.00

Basic Mode Expanded Mode

		Delete	Budget Sequence	Old Budget Amount	Old Percentage Of Distribution	Budget Amount	Percent of Distribution	Combo Code	Combo Code
1	+ -	<input type="checkbox"/>	1	\$48000.000	80.000	\$49,600.000	80.000	000200814	20101-1200
2	+ -	<input type="checkbox"/>	1	\$8399.400	13.999	\$8,679.380	13.999	000227884	25210-4900 5100065
3	+ -	<input type="checkbox"/>	1	\$3600.600	6.001	\$3,720.620	6.001	000238574	20101-1200 5100065

New Total \$62,000.000  
Old Total \$60,000.000

Percent 100.000 Unfunded Amount \$0.000

Reconcile

Result: The system calculates and automatically fills in the Budget Amount for each line of funding by applying the old percentages to the dollar amount entered in the Annual Rate field.

- If you want to enter exact budget amounts for specific funding sources:
  - a) Click on the **Add a new row** button to create a new funding row for each source. Enter all information for each source before entering a dollar amount in the Annual Rate field.

## Changes to the Funding Grid

\*Annual Rate:

Effective Date 09/17/2015

Eff Sequence 0

Budget Amount \$0.00

Basic Mode Expanded Mode

			Delete	Budget Sequence	Old Budget Amount	Old Percentage Of Distribution	Budget Amount	Percent of Distribution	Combo Code	Combo Code
1	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="checkbox"/>	1	\$48000.000	80.000		80.000	000200814	20101-1200 318300
2	<input type="button" value="+"/>	<input type="button" value="-"/>		1			<input type="text"/>	80.000	000200814	20101-1200 318300
3	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="checkbox"/>	1	\$8399.400	13.999		13.999	000227884	25210-4900 5100065
4	<input type="button" value="+"/>	<input type="button" value="-"/>		1			<input type="text"/>	13.999	000227884	25210-4900 5100065
5	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="checkbox"/>	1	\$3600.600	6.001		6.001	000238574	20101-1200 5100065
6	<input type="button" value="+"/>	<input type="button" value="-"/>		1			<input type="text"/>	6.001	000238574	20101-1200 5100065

New Total \$0.000      Percent 200.000      Unfunded Amount \$0.000     

Old Total \$60,000.000

- b) Mark the check box in the **Delete** column to delete each old row of funding information.

Form Data

Annual Salary @ FTE1.0  
65,000.00

\*Annual Rate:  65,000.00

Effective Date 09/17/2015

Eff Sequence 0

Budget Amount \$65,000.00

Basic Mode Expanded Mode

		Delete	Budget Sequence	Old Budget Amount	Old Percentage Of Distribution	Budget Amount	Percent of Distribution	Combo Code	Combo Code
1	+	-	<input checked="" type="checkbox"/>	1	\$48000.000	80.000		000200814	20101-12001 318300
2	+	-	<input type="checkbox"/>	1		\$48,000.000	73.848	000200814	20101-12001 318300
3	+	-	<input checked="" type="checkbox"/>	1	\$8399.400	13.999		000227884	25210-49000 5100065
4	+	-	<input type="checkbox"/>	1		\$8,399.400	12.922	000227884	25210-49000 5100065
5	+	-	<input checked="" type="checkbox"/>	1	\$3600.600	6.001		000238574	20101-12001 5100065
6	+	-	<input type="checkbox"/>	1		\$8,600.000	13.231	000238574	20101-12001 5100065

New Total \$64,999.400    Percent 99.999    Unfunded Amount \$0.600    Reconcile

Old Total \$60,000.000

- c) Enter the dollar amount paid to the employee in the **Annual Rate** field.
- 3. Click on the **Reconcile** button to correct any type of rounding issues with funding balances.

Caution! When you click the Reconcile button, the system changes the row that was the last funding row when you first navigated to the funding grid. If you sorted the rows, the original last row may no longer appear to be the last row on the grid.

## Changes to the Funding Grid

**Form Data**

**Annual Salary @ FTE1.0**

**\*Annual Rate:**  65,000.00

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**Effective Date** 09/17/2015 + -

**Eff Sequence** 0

**Budget Amount** \$65,000.00

Basic Mode
Expanded Mode

			<u>Delete</u>	<u>Budget Sequence</u>	<u>Old Budget Amount</u>	<u>Old Percentage Of Distribution</u>	<u>Budget Amount</u>	<u>Percent of Distribution</u>	<u>Combo Code</u>	<u>Combo Code</u>
1	+ -	<input checked="" type="checkbox"/>		1	\$48000.000	80.000			000200814	20101-12001 318300
2	+ -	<input type="checkbox"/>		1			<input type="text" value="\$48,000.000"/>	73.846	<input type="text" value="000200814"/> 🔍	20101-12001 318300
3	+ -	<input checked="" type="checkbox"/>		1	\$8399.400	13.999			000227884	25210-49000 5100065
4	+ -	<input type="checkbox"/>		1			<input type="text" value="\$8,399.400"/>	12.922	<input type="text" value="000227884"/> 🔍	25210-49000 5100065
5	+ -	<input checked="" type="checkbox"/>		1	\$3600.600	6.001			000238574	20101-12001 5100065
6	+ -	<input type="checkbox"/>		1			<input type="text" value="\$8,600.600"/>	13.232	<input type="text" value="000238574"/> 🔍	20101-12001 5100065

**New Total** \$65,000.000

**Old Total** \$60,000.000

**Percent** 100.000

**Unfunded Amount** \$0.000

Reconcile

8. After all funding sources are entered and the Unfunded Amount is \$0, click on the **Next** button to continue completing the ePAR