Human Resource Management and the Office of Research

HR/Pay Training for Funding Entry
Agenda

- Review Assumptions & Guidelines
- Review of the HR/Pay Funding Entry Training Guide
  - Includes review of HR/Pay funding
- Training Scenario Review
- Key Example Together
- Key Worksheets Individual
  - (Pam and Kara are here for assistance – Just ask!)
- What is next?
Assumptions

- Within the SSC and AMS the following has been covered:
  - How to calculate appointment cost and funding

- How to use the Sharepoint site for tracking Project Funding Changes (Hopefully change coming soon!)

- Funding Checklist (Optional)

- Validation of state allocated funding and working with Budget Officers
Guidelines

- Training Prerequisites: HR/Pay Basic Navigation and Grant Payroll Funding

- SSC/AMS staff are not to key prior period funding changes

- SSC/AMS staff will only modify existing Department Budget Tables (DBT) (No deletion even future.)

- SSC/AMS staff will not modify Research Pool DBT

- SSC/AMS staff will follow guidelines on entry or possible loss of access. (Ask before entry if in doubt.)
Review Funding Entry into the Department Budget Table (DBT) Guide

Training Scenario Review

- Scenario 1 through 3 detailed review
- Scenario 4 through 12 review

- As the Scenarios progress, less step by step detail is provided
- Key Scenario as a group at the end.
Scenario 1-Basic Funding Change-Project

Jayhawk One is to be paid 100% from Project 1000096 effective 3/1/24 (FY2024)

• Position # 00008397

• Department 2950000

• Unclassified

• Regular Position (Position Level Funded)

• HRM Partner tile>Job>Job Data
**Scenario 1 - Basic Funding Change - Project**

Based on the Budget Summary

- We know the ChartFields to be used.
  - DEPT ID (Cost Center)
  - Fund
  - Project

---

**Sponsored Project Budget Summary**

<table>
<thead>
<tr>
<th>Project ID</th>
<th>1000096</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor</td>
<td>KANSAS DEPARTMENT OF TRANSPORTATION</td>
</tr>
<tr>
<td>Sponsor Award Number</td>
<td>TR-2114-18</td>
</tr>
<tr>
<td>Flow Thru Sponsor</td>
<td>Details</td>
</tr>
<tr>
<td>Award Type</td>
<td>Contract</td>
</tr>
<tr>
<td>Pre-Award Date</td>
<td>KURES</td>
</tr>
<tr>
<td>Business Unit</td>
<td>KURES MTDC R ON %</td>
</tr>
</tbody>
</table>

**Notes:**
- Record Retention 5 years.
- All Reviewed and None Apply: Exp. Date:

<table>
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<th>Terms</th>
<th>Direct</th>
<th>Subject To F&amp;A</th>
<th>SALARIES - UNCLASSIFIED</th>
<th>$15,742.00</th>
<th>$0.00</th>
<th>$15,742.00</th>
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**IP #**
- 0000008875

**FY ID #**
- 18N023505

**Award Start Date**
- 1/1/15

**Award End Date**
- 6/30/2024

**Project Start Date**
- 10/1/17

**Project End Date**
- 6/30/2024

**Organization**
- 2950601-KGS DASC/NELSON

**Fund Code**
- 908

**Project ID**
- 9000008875

**Project ID**
- 1000096

---

2950601
908
1000096
The Combination Code exists in HR/Pay to represents a unique set of ChartFields.

Validate the combination code is active as of the date we need.

HRM Partner> Funding> Combination Code Table
HRM Partner> Funding> Department Budget Table USA
Scenario 2 – Split Funding & Cost Share Project

Jayhawk Two is to be funded as of 2/1/24 by the following funding sources; one source is Cost Share.

• 5% 78813CS950
  (2510000-099 with CF1-SSWMSW0004)
• 95% 2510000-099 with CF1 SSWBSW0004

Jayhawk Two Job Information
• Position 00005507
• Department 2510000
• Regular
• Faculty
Scenario 2 – Split Funding & Cost Share Project

Validate Project and ChartFields

Sponsored Project Budget Summary

<table>
<thead>
<tr>
<th>Project ID</th>
<th>78813CS950</th>
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<tbody>
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<td>Flow Thru Sponsor</td>
<td>Grant</td>
</tr>
<tr>
<td>Project Title</td>
<td>78813CS950-950 CS FOR NIH3078813</td>
</tr>
<tr>
<td>PI</td>
<td>Smith, Jane</td>
</tr>
<tr>
<td>Co-PI</td>
<td></td>
</tr>
<tr>
<td>PAS Team</td>
<td>TEAM 3, PAS</td>
</tr>
</tbody>
</table>

Project = 78813CS950 ChartField 2 = CS

DEPT ID & Fund and optional CF1 will be determined by the source providing the Cost Share
The Combination Code exists in HR/Pay to represents a unique set of ChartFields.

Validate the combination code is active as of the date we need.

HRM Partner>Funding>Combination Code Table
HRM Partner> Funding>Department Budget Table USA

The ChartFields Details are linked from the Combination Code Description tab.

A row already existed with the same effective date; the system assigned an Eff Seq 1.
Scenario 3 – Multiple Effective Dates - Project

Jayhawk Three (pos 00002979) is to change funding effective 2/1/24 to the following:

- 20% 1000099
- 30% 2151000 KUEA 42123X(CF3) CLASREI073
- 50% 2151605 099

and

change funding effective 3/1/24 to the following:

- 25% 2151000 KUEA 42123X(CF3) CLASREI073
- 75% 2151605 099
## Scenario 3 – Multiple Effective Dates

### Validate Project and ChartFields

### Sponsored Project Budget Summary

<table>
<thead>
<tr>
<th>Project ID</th>
<th>1000099</th>
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</thead>
<tbody>
<tr>
<td>Sponsor</td>
<td>NASA</td>
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<td>Sponsor Award Number</td>
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<tr>
<td>Flow Thru Sponsor</td>
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<td>Award Type</td>
<td>Project 1000099</td>
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<td>Project Title</td>
<td>Extreme Energy Particle Astrophysics with ANITA-V - University of Kansas Center for Research, Inc. (Co-I)</td>
</tr>
<tr>
<td>PI</td>
<td>Besson, David</td>
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<tr>
<td>Co-PI</td>
<td></td>
</tr>
<tr>
<td>PAS Team</td>
<td>TEAM 1, PAS</td>
</tr>
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<td>Award Start Date</td>
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<tr>
<td>Project Start Date</td>
<td>4/1/18</td>
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<td>Notes:</td>
<td>FA Return: 2100701=10, 2151763=4 - Notice of Award Per award document from sponsor; Budsum prepared by B. Montrose</td>
</tr>
<tr>
<td>Terms:</td>
<td>NASA China Restriction;</td>
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<td>Compliances:</td>
<td>Exceptional Collaborator: Exp. Date:;</td>
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<table>
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<th>Resource Category</th>
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<th>Adjustment</th>
<th>Previous Budget</th>
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<tbody>
<tr>
<td>Direct Subject To F&amp;A</td>
<td>SALARIES - STUDENT</td>
<td>$17,744.00</td>
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<td>$17,744.00</td>
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<tr>
<td>Direct Subject To F&amp;A</td>
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<td>Direct Subject To F&amp;A</td>
<td>SALARIES - KEY PERSONNEL</td>
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<tr>
<td>Direct Subject To F&amp;A</td>
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<td>$5,000.00</td>
<td>$0.00</td>
<td>$5,000.00</td>
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</tbody>
</table>

**Summary:**
- **Fund Code:** 908
- **Research Center:** KURES
- **Organization:** 2151000-PHSX PHYSICS AND ASTRONOMY
- **Pre-Award Date:** 01/31/2024
- **Business Unit:** KURES
- **F & A Rate Type:** KURES MTDC R ON 51.5%
- **Note:** Award document from sponsor; Budsum prepared by B. Montrose

**DEPT ID 2151000 Fund 908**

**Project 1000099**

rev 1/2024
Professor D Besson 00003028 is to have a funding change effective 3/10/24 to the following split:

- 50% 1000099
- 50% 1000098
Scenario 4 – PI Funding Change

Validate Project and ChartFields – Note PI and Key Personnel Category

2151000
908
1000099
PI
Scenario 4 – PI Funding Change

Validate Project and ChartFields

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**Sponsored Project Budget Summary**

**Project ID**: 1000098

**Sponsor**: HONEYWELL

**Sponsor Award Number**: none

**Flow Thru Sponsor**: US DEPARTMENT OF ENERGY

**Award Type**: SubContract

**Award Start Date**: 12/14/15

**Project Start Date**: 2/12/16

**Notes**: See notes on page 2.

**Terms**: Hiring Restriction - Foreign Nationals; Publication Delay Up to 120 Days;

**Compliances**: See notes on page 2.

<table>
<thead>
<tr>
<th>Resource Category</th>
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<th>Adjustment</th>
<th>Previous Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARIES - STUDENT</td>
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<tr>
<td>TUTIONNC F&amp;A</td>
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<td>$10,892.00</td>
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<tr>
<td>FRINGE</td>
<td>$7,176.00</td>
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<td>$7,176.00</td>
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<tr>
<td>OTHER EXPENSES</td>
<td>$2,767.00</td>
<td>$0.00</td>
<td>$2,767.00</td>
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<tr>
<td>SALARIES - KEY PERSONNEL</td>
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</tbody>
</table>

**Total Budget**: $299,500.00

2995000
908
1000098

rev 1/2024
Professor D Besson 00003028 is now to have funding changed effective 3/15/24

- 50% 1000099
- 50% 2151000-099

and effective 4/1/24

- 100% 2151000-099

and then effective 5/1/24

- 50% 1000099
- 50% 1000098
Scenario 5 – Multiple Effective Dates

Validate Project and ChartFields – Note PI and Key Personnel Category

Sponsored Project Budget Summary

<table>
<thead>
<tr>
<th>Project ID</th>
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</tr>
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<tbody>
<tr>
<td>Sponsor</td>
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<td>Flow Thru Sponsor</td>
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</tr>
<tr>
<td>Award Type</td>
<td>Research Center</td>
</tr>
<tr>
<td>Project Title</td>
<td>Extreme Energy Particle Astrophysics with ANITA-V - University of Kansas Center for Research, Inc. (Co-I)</td>
</tr>
<tr>
<td>Organization</td>
<td>2151000-PHSX PHYSICS AND ASTRONOMY</td>
</tr>
<tr>
<td>PI</td>
<td>Besson, David</td>
</tr>
<tr>
<td>Co-PI</td>
<td></td>
</tr>
<tr>
<td>PAS Team</td>
<td>TEAM 1, PAS</td>
</tr>
<tr>
<td>Award Start Date</td>
<td>4/1/18</td>
</tr>
<tr>
<td>Award End Date</td>
<td>03/30/2026</td>
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<tr>
<td>Project Start Date</td>
<td>4/1/18</td>
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<tr>
<td>Project End Date</td>
<td>03/30/2026</td>
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Notes:
FA Return: 2100701=10, 2151763=4; Notice of Award: Per award document from sponsor – Budzum prepared by B. Monrose
Terms:
NASA China Restriction
Compliances:
Exceptional Collaborator Exp. Date:

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<tbody>
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<td>Direct</td>
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<td>$0.00</td>
<td>$17,744.00</td>
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<tr>
<td>Direct</td>
<td>Subject To F&amp;A</td>
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<tr>
<td>Direct</td>
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<td>TUITION NO F&amp;A</td>
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<td>Direct</td>
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<td>$17,040.00</td>
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</tbody>
</table>
Scenario 5 – Multiple Effective Dates

Validate Project and ChartFields

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**Sponsored Project Budget Summary**

- **Project ID**: 1000098
- **Sponsor**: HONEYWELL
- **Sponsor Award Number**: none
- **Flow Thru Sponsor**: US DEPARTMENT OF ENERGY
- **Award Type**: SubContract
- **Project Title**: Research and Development PDRD Text: Security 704855
- **Pre-Award Date**: 12/14/15
- **Award Start Date**: 12/14/15
- **Project Start Date**: 2/12/18
- **Award End Date**: 4/30/24
- **Project End Date**: 4/30/24

**Notes:**
- See notes on page 2.
- **Terms:** Hiring Restriction - Foreign Nationals; Publication Delay Up to 120 Days;

**Compliances:**
- See notes on page 2.

<table>
<thead>
<tr>
<th>Direct/Indirect</th>
<th>Category</th>
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<td>Direct</td>
<td>Subject To F&amp;A</td>
<td>FRINGE</td>
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<td>Direct</td>
<td>Subject To F&amp;A</td>
<td>OTHER EXPENSES</td>
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<tr>
<td>Direct</td>
<td>Subject To F&amp;A</td>
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*rev 1/2024*
Professor D Besson 00003028 that his funding should be changed effective 3/15/24

• 50% 1000099
• 50% 2151000-099

and effective 4/1/24

• 100% 2151000-099

• and then effective 5/1/24

• 50% 1000098
• 50% 1000099
Scenario 6 – Multiple Dates & Override Fringe

Effective 2/5/24 Polly Staff is to be paid from KAN0060647 100% (Position 00208166 -2930000)

- Project KAN0060647 does not allow fringe cost.
- 100% of the Fringe will be covered by departmental funds 2930000-099

Effective 5/1/24 Polly’s salary will be switched to 100% from the departmental funds 2930000-099
Scenario 6 – Multiple Dates & Override Fringe
When adding or removing Overrides:
1) Insert the new effective date row.

1) Delete all Distribution rows on each page. (Earnings, Deductions and Taxes)

“Clean your plate.”
After deleting every distribution row for each page/tab, enter the new funding in each of the 3 pages: Earnings, Deductions and Taxes, then Save.

(Do not save in between tab/pages.)

Upon Save the system will check or uncheck the Override box.
When a row exists with the same effective date as the row that is being entered, the system assigns the next effective sequence.

Position 00200596 effective 3/1/24 change to 1511600-099
Scenario 8 – Funding Setup Request

You have been asked to fund Jacob Staff from the following ChartFields:
   DEPT ID 1520300
   Fund 099

Jacob is a Regular, Unclassified Employee on Position 00012345

When searching for the combination code your results are “No matching values were found.” then...

You then look in the DEPT ID table – (Department CF) and “No matching values were found.”
Scenario 9 – Funding Setup Request

• Contact the Budget Officer to see if DEPT ID is valid to be used for Payroll or an incorrect number was provided.
• If valid, confirm who will be submitting the Funding Set Up Request form to the Budget Office.
  • Funding Set Up Request form (Requesting: Combination Codes, Pool ID and Payroll acceptable DeptID/Cost Centers.)
  • Link to the Funding Set Up Request form: https://inowformsprivate.ku.edu/fs?form=Funding%20Set%20Up%20Request%20Form
Scenario 10 – PI Usage and Key Personnel Line

Using the Budget Summary for FED0098989, could you fund Amir Khan from the Key Personnel Line?

No, only “the PI” Ted Harris is allowed to be charged to the Key Personnel Line.
If you are asked to fund Huntley Jones from KUEA 56789 and 56789X does not exist in the Combination Code table and then in checking does not exist in ChartField 3 table what do you do?

- Confirm with the Budget Officer that is a valid and appropriate KUEA number to be used.
- If it is, determine who will process the Funding Set Up Request Form and submit to the Budget Office.
- You will need to provide the DEPT ID/Cost Center that you want to use with the CF3 and Fund 725
  Link to the Funding Set Up Request form
  https://inowformsprivate.ku.edu/fs?form=Funding%20Set%20Up%20Request%20Form
Scenario 12 – Pool ID Funding Setup Request

You searched and are not able to find a Position Pool ID with the funding that you want, what do you do?

❖ May look in HR/Pay or file results in PRD_Share>HRPay_Fund_Audit (OAC Pool ID report in testing!)

If it is Project funded or 9XX funding or DEPT ID 2301XXX or 2302XXX – Submit Funding Set Up Request form to Office of Research. Link to the Funding Set Up Request form:
https://inowformsprivate.ku.edu/fs?form=Funding%20Set%20Up%20Request%20Form

If not the above – contact the Budget Officer to see if they have a number to assign and also who will submit Funding Set Up Request form to the Budget Office. Link to the Funding Set Up Request form:
https://inowformsprivate.ku.edu/fs?form=Funding%20Set%20Up%20Request%20Form

If a combination Research and Budget – follow the contacts above and submit the Request Form to the Budget Office.
Contacts

Human Resource Management
Pam Burkhead
pburkhead@ku.edu

Office of Research
Kara McDowell
kemcdowell@ku.edu