Non-professorial staff

- When entering a fellowship application on pFACT, the fellow is entered as the Principal Investigator (PI) of the proposal.

- The costs of the PI are automatically classified as directly allocated (DA) but in case of a fellowship application it should be directly incurred (DI).

- In order to change the cost classification in pFACT, the following steps are required:
  - Add the fellow as the PI on the “Add New Project Proposal” screen.
  - After pressing the “Save” button, pFACT will open the “Project Proposal Summary” screen from which you can access the details of the PI by clicking on the “Staff Cost” hyperlink.
Click on the grade associated with the PI in the column “Description”

This opens the “Edit Staff” screen

Change the Staff Type by selecting “FE – Fellowship” from the drop-down list

Press Save and Close to return to the “Project Proposal Summary” screen

The cost of the fellow have now been classified as directly incurred

Proceed with entering all project related cost to your proposal as normal
**Professorial staff**

- Currently pFACT is not able to calculate salaries that are not attached to payscale, i.e. non-spinal salaries

- If adding a new fellowship project on pFACT and the fellow is a professor, the actual salary costs for the fellowship need to be calculated outside of pFACT and then entered as a lump sum to the project

- The next full release of pFACT (due in July/August 2007) will have incorporate a new functionality which will allow for user-defined salary calculations

- To work out the salary costs follow the link “pFACT User-defined salary calculations” from the pFACT web-page (http://www.ucl.ac.uk/finance/secure/research/rafund_pfactintro.htm)

- The following spreadsheet is displayed

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>2</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Start Date</td>
<td>01/08/2006</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>End Date</td>
<td>31/07/2007</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Basic</td>
<td>50,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>LA</td>
<td>2,472</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>BASIC SALARY</th>
<th>LONDON ALLOWANCE</th>
<th>NI</th>
<th>USS/NHS 14%</th>
<th>SAUL 13%</th>
<th>TOTAL (WITH USS/NHS)</th>
<th>TOTAL (WITH SAUL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>50,000</td>
<td>2,472</td>
<td>5,051</td>
<td>7,346</td>
<td>6,821</td>
<td>64,869</td>
<td>64,344</td>
</tr>
</tbody>
</table>

- Enter the start and end date of the costing, the basic salary and London Allowance, if applicable

- The spreadsheet then automatically works out the NI and superannuation figures and provides a total and columns G or H (dependant on the pension scheme applied)

- Print the spreadsheet

- When entering the project on pFACT, choose the professor from the list of existing staff as the PI of the project

13/02/2007
After pressing [Save] and [Close], pFACT will open the “Project Proposal Summary” screen from which you can access the details of the PI by clicking on the “Staff Cost” hyperlink.

Delete the line generated by pFACT for the PI by clicking “Remove”. When asked for a reason, enter “Professorial Fellowship”.

13/02/2007
• Access the staff costs from the “Project Proposal Summary” screen and hit + to add a new record

• Choose option “Non Standard Staff not using Payscale”

• Enter the cost of the fellow as follows

![Add Staff](image)

**Staff Name**  Enter the name of the fellow

**Work Type**  This is for classification purpose only and is **not** used in calculations

**Staff Type**  Choose “FE – Fellowship” from the drop-down list

**Units**  Enter “1”

**Unit Type**  Enter “Onetime”

**@Rate**  Enter the salary costs as worked out by the spreadsheet

**FTE for FEC**  Enter the FTE relating to the whole period of the project (e.g. if a project last 3 years and the fellow works full-time the value will be 3) – this determines the indirect/estates costs

• Press **Save** and **Close** to return to the “Project Proposal Summary” screen and enter the rest of your proposal as normal

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