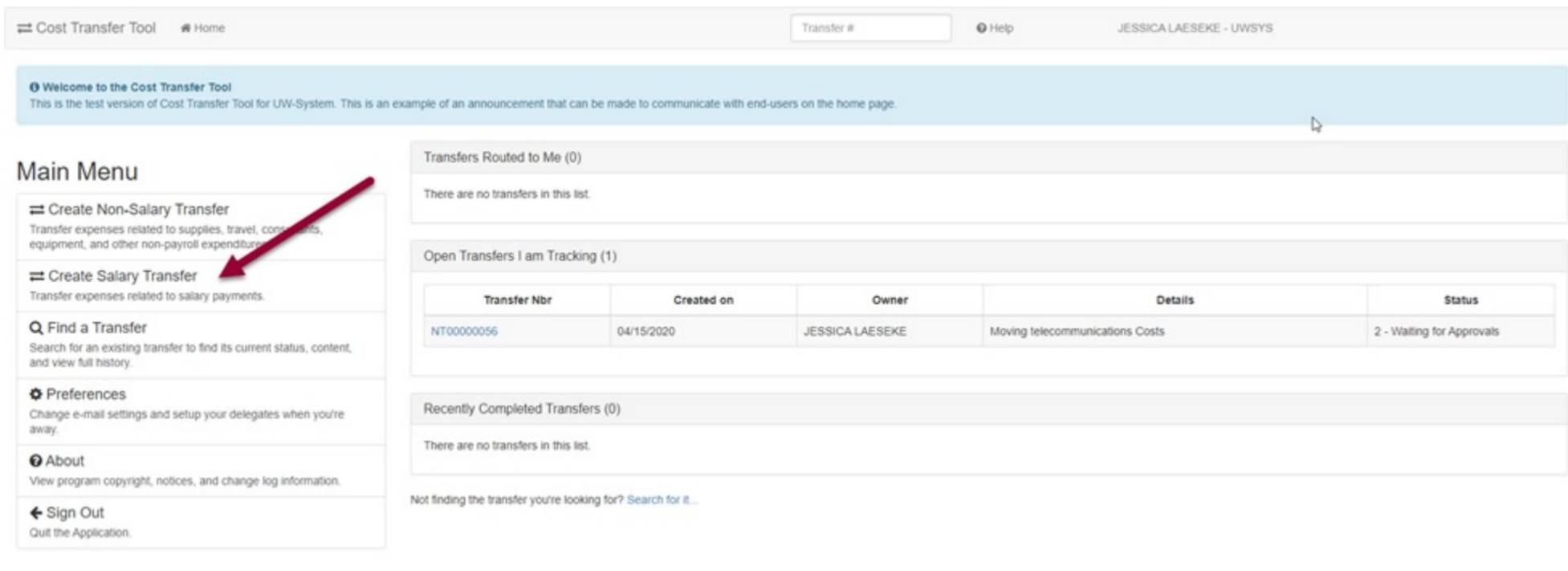# COST TRANSFER TOOL - CREATING SALARY COST TRANSFERS

This article outlines the process for creating salary cost transfers in the Cost Transfer Tool.

The following steps will walk you through creating a non-salary cost Transfer in the Cost Transfer Tool:
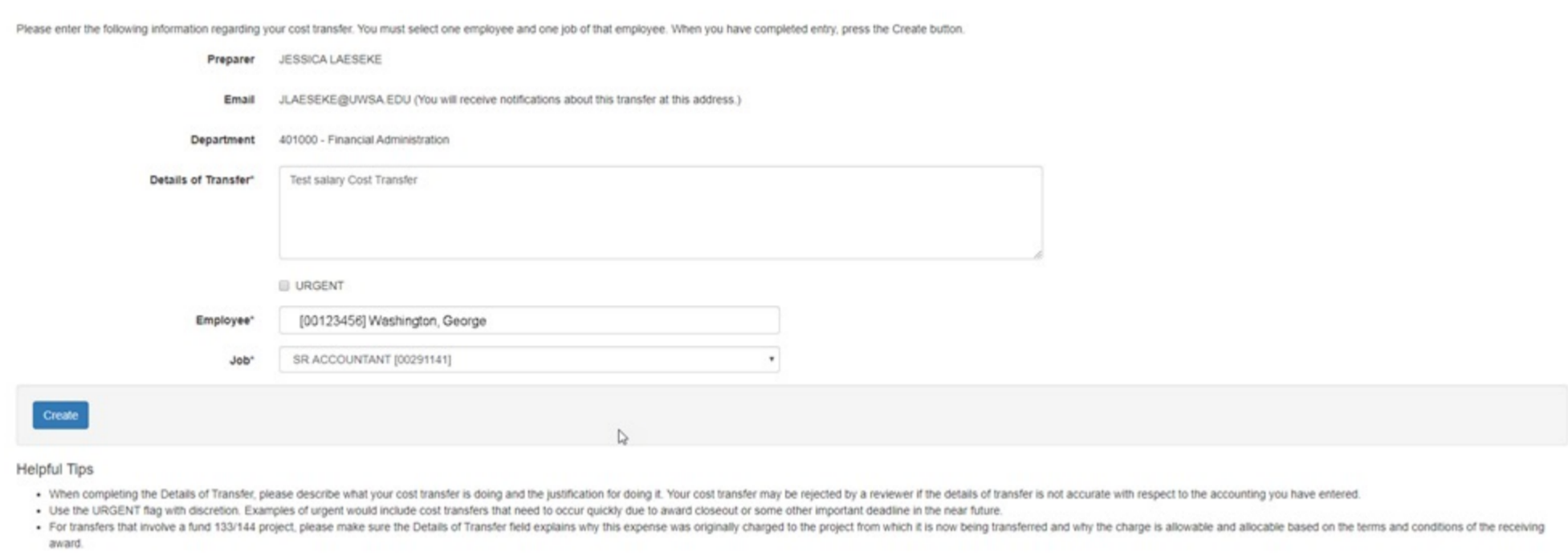
Salary Cost Transfers

1. Log into the Cost Transfer Tool here: https://ct.sfs.services.wisc.edu/.

2. Click on the "Create Salary Transfer" button on the left navigation bar:

3. The next screen will bring up the Salary Cost Transfer Detail page. Details should be clear and concise so reviewers/approvers can understand the reason for the transfer. The Urgent flag is used to indicate an important deadline (e.g. award closeout or fiscal year-end) and will move the transfer to the beginning of the queue for the approvers or "routed to" persons. For Salary Cost Transfers, there must be an employee selected at the transfer details panel. Enter employee last name to get a drop-down list of employees. For common last names, leave a space and continue typing the first name to narrow the list. After selecting the correct employee and job, click the "Create" button.

4. Clicking on "Create" takes you to the Salary Cost Transfer details screen. A unique transfer number is assigned for the transfer, and other basic information is displayed in the heading. In order to start the transfer, click on "Add a pay period" to search for specific payroll transactions in WISER.
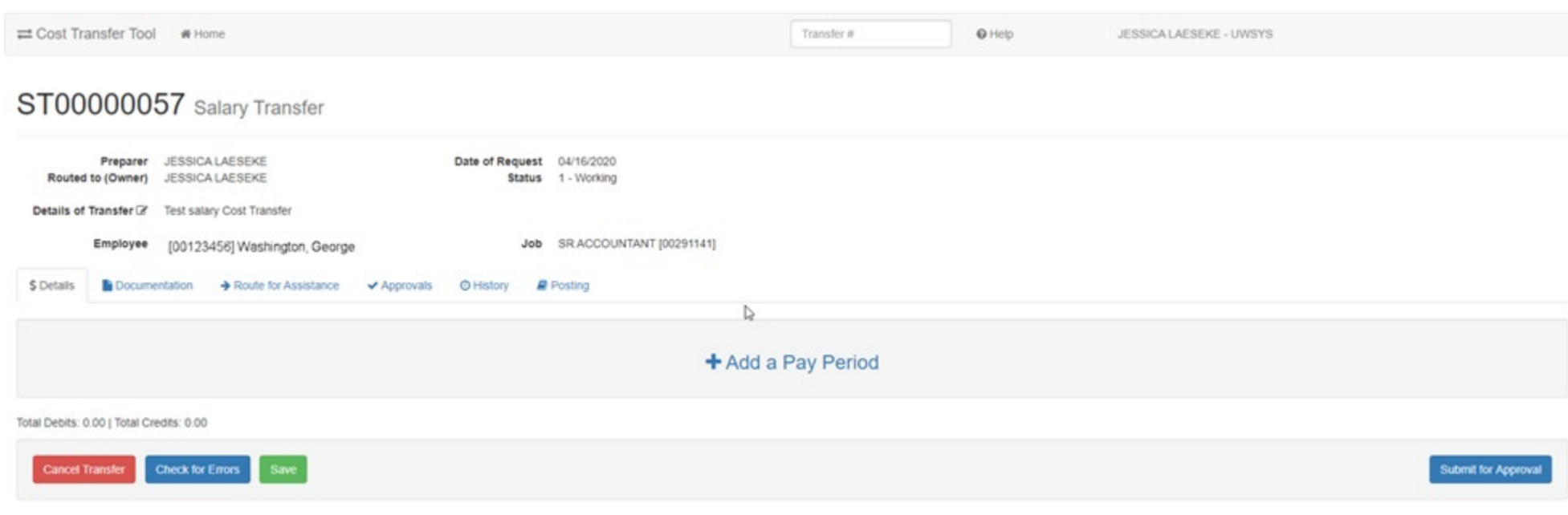
5. Next, you will need to enter a date range to search for payments for an employee. The default date range is the current fiscal year:

ST00000057 Salary Transfer

Preparer	JESSICA LAESEKE	Date of Request	04/16/2020
Routed to (Owner)	JESSICA LAESEKE	Status	1 - Working
Details of Transfer	Test salary Cost Transfer		
Employee	[00123456] Washington, George	Job	SR ACCOUNTANT [00291141]

$ Details   Documentation   Route for Assistance   Approvals   History   Posting

Salary Payment Search

Select the salary payments you wish to transfer. When completed, click the Done button below to move the payments into your salary cost transfer.

Payment End Date 07/01/2019 to 06/30/2020   Search

Select/Unselect All Payments

Pay Period 11/01/2019 to 11/30/2019 $5,950.00

Select	Empl ID	Employee Name	Fund	Dept	Project	Program	Account	Payrun ID	Amount
☐	00123456	[00123456] Washington, George	106	401000		1	1051	2019UNC11	5,545.94
☐	00123456	[00123456] Washington, George	106	401000		1	1051	2019UNC11	404.06

Exit Search   Done

6. Check the box in the "Select" column to select payments to be transferred and press "Done" when complete:

ST00000057 Salary Transfer

Preparer	JESSICA LAESEKE	Date of Request	04/16/2020
Routed to (Owner)	JESSICA LAESEKE	Status	1 - Working
Details of Transfer	Test salary Cost Transfer		
Employee	[00123456] Washington, George	Job	SR ACCOUNTANT [00291141]

$ Details   Documentation   Route for Assistance   Approvals   History   Posting

Salary Payment Search

Select the salary payments you wish to transfer. When completed, click the Done button below to move the payments into your salary cost transfer.

Payment End Date 07/01/2019 to 06/30/2020   Search

Select/Unselect All Payments

Pay Period 11/01/2019 to 11/30/2019 $5,950.00

Select	Empl ID	Employee Name	Fund	Dept	Project	Program	Account	Payrun ID	Amount
☑	00123456	[00123456] Washington, George	106	401000		1	1051	2019UNC11	5,545.94
☑	00123456	[00123456] Washington, George	106	401000		1	1051	2019UNC11	404.06

Exit Search   Done

7. This creates the transfer sets that can be modified to move an expense to a different funding string:

ST00000057 Salary Transfer (UWSYS)

Preparer	JESSICA LAESEKE	Date of Request	04/16/2020
Routed to (Owner)	JESSICA LAESEKE	Status	1 - Working
Details of Transfer	Test salary Cost Transfer		
Employee	[00123456] Washington, George	Job	SR ACCOUNTANT [00291141]

$ Details   Documentation   Route for Assistance   Approvals   History   Posting

Pay Period 11/01/2019 - 11/30/2019

	Dept ID	Fund	Project	Prog	Account	Class	Amount	Description	✕
From	401000	106		1	1051		-5,545.94	[00123456] Washington, George	👁
From	401000	106		1	1051		-404.06	[00123456] Washington, George	👁
To	401000	106		1	1051		5,545.94	[00123456] Washington, George	⧉ ➕ ➖
To	401000	106		1	1051		404.06	[00123456] Washington, George	⧉ ➕ ➖

Pay Period 02/01/2020 - 02/29/2020

	Dept ID	Fund	Project	Prog	Account	Class	Amount	Description	✕
From	401000	106		1	1051		-6,375.00	[00123456] Washington, George	👁
To	401000	106		1	1051		6,375.00	[00123456] Washington, George	⧉ ➕

➕ Add a Pay Period

Total Debits: 12,325.00 | Total Credits: 12,325.00

Cancel Transfer   Check for Errors   Save   Submit for Approval

8. There are some additional functions that can be accessed in the far right column:

👁 View more detail - additional WISER fields are displayed.

⧉ Copy to all - the funding string is copied to all "To" lines.

➕ Split - Add a "To" line to split a "From" line.

➖ Delete - remove the line. This is only available when you have multiple "To" lines for one pay period.

9. Once finished entering the details of the transfer, click "Save", "Check for Errors", and "Submit for Approval"

ST00000081 Salary Transfer (UWMSN)

Preparer	Janet Larson	**Date of Request**	04/27/2020
Routed to (Owner)	Janet Larson	**Status**	1 - Working
Details of Transfer ✎	SCT		
Employee	[0123456] George Washington	**Job**	IS SYS DEV SRV CON/AD [01422900]

$ Details   📄 Documentation   → Route for Assistance   ✔ Approvals   ⏱ History   🔖 Posting

Pay Period 06/23/2019 - 07/06/2019

1	Dept ID	Fund	Project	Prog	Account	Class	Amount	Description	✖
From	062530	128		1	1531		-2,068.80	Washington, George	👁
To	030500	101		1	1531		2,068.80	Washington, George	📑⚙

➕ Add a Pay Period

Total Debits: 2,068.80 | Total Credits: 2,068.80

[Cancel Transfer] [Check for Errors] [Save]   [Submit for Approval]

Send a comment/support

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10. "Check for Errors" and "Submit for Approval" will validate the funding strings. If there are errors, they will show in red:

Pay Period 11/01/2019 - 11/30/2019

1	Dept ID	Fund	Project	Prog	Account	Class	Amount
From	401000	106		1	1051		-5,545.94
From	401000	106		1	1051		-404.06
To	3501000	106		1	1051		5,545.94
⚠	Invalid Chart Field DEPTID Value (3501000)						
To	3501000	106		1	1051		404.06
⚠	Invalid Chart Field DEPTID Value (3501000)						

Pay Period 02/01/2020 - 02/29/2020

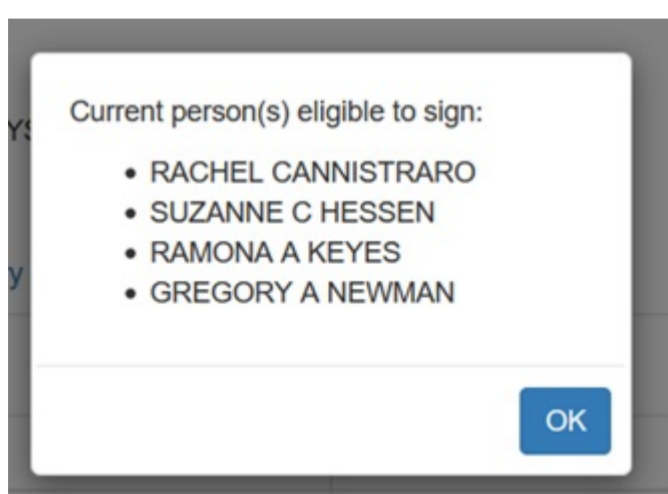| 2	Dept ID	Fund	Project	Prog	Account	Class	Amount
From	401000	106		1	1051		-6,375.00
To	3501000	106		1	1051		6,375.00
⚠	Invalid Chart Field DEPTID Value (3501000)						

11. If there are errors, you must update the funding strings before the transfer can be submitted. Once the transfer has been successfully submitted, you can track its approval route on the "Approvals" tab:

$ Details   📄 Documentation   → Route for Assistance   ✔ Approvals   ⏱ History   🔖 Posting

3 total signatures required. 3 signatures remaining.

	Signature Role	For	Signed by	Signed on	
✎	Division Representative	Division 06			Who can sign?
✎	Division Representative	Division 03			Who can sign?
✎	Central Office Approver				Who can sign?

12. Clicking the "Who can sign?" link will provide a list of individuals that can approve the transfer:

Current person(s) eligible to sign:

- RACHEL CANNISTRARO
- SUZANNE C HESSEN
- RAMONA A KEYES
- GREGORY A NEWMAN

[OK]

13. The "History" tab provides additional details about the transfer as it goes through the approval process:

$ Details   📄 Documentation   → Route for Assistance   ✔ Approvals   ⏱ History   🔖 Posting

Event	Additional Details	Date	User
Status Changed	Status changed to 4 - Completed.	04/15/2020 3:09:06 pm	SHERRI VOIGT
Posted	Transfer posted to Journal JRT0312131.	04/15/2020 3:09:06 pm	SHERRI VOIGT
Status Changed	Status changed to 3 - Waiting to Post.	04/15/2020 3:09:03 pm	SHERRI VOIGT
Approved	SHERRI VOIGT signed for Central Office Approver.	04/15/2020 3:09:03 pm	SHERRI VOIGT
Approved	NICOLA J BURTON signed for Division Representative.	04/15/2020 3:08:33 pm	NICOLA J BURTON
Status Changed	Status changed to 2 - Waiting for Approvals.	04/15/2020 3:06:45 pm	SHERRI VOIGT
Created	Record was created.	04/15/2020 1:40:54 pm	SHERRI VOIGT