

## Overview:

Describes how to add personnel to the budget and assign them to project periods.

**Note:** Personnel who have been named in the proposal will auto-populate into the budget, but they must be assigned to budget periods.

## Procedure:

### Adding Personnel Budget Costs – Detailed Instructions

Personnel Cost Elements within a budget describe the salaries for individuals that will be directly funded out of the proposal award. Kuali allows you to add and budget for named persons (Investigators, Key Persons) as well as persons to be named at a later date (Postdocs, research assistants).

#### Entering Personnel Budget Costs is a two-part process.

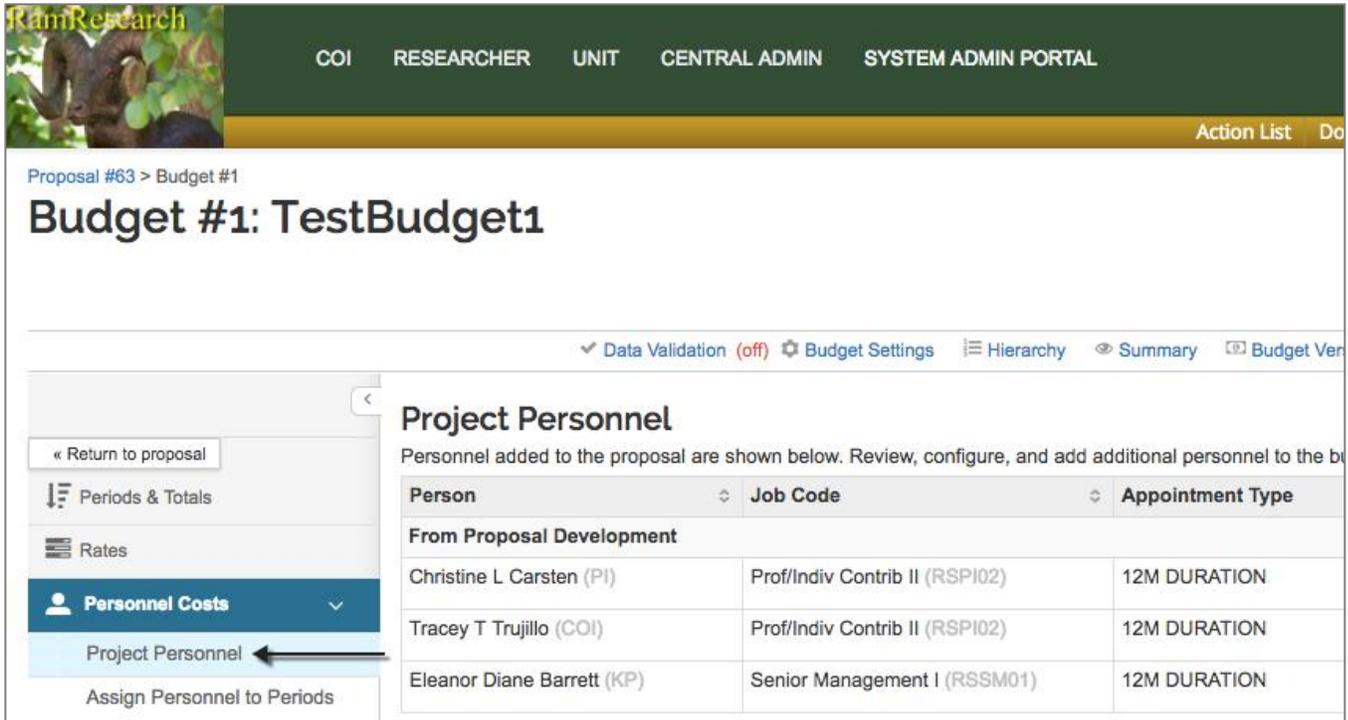
- Update the **Project Personnel** list for your budget
- Add Budget Persons to personnel cost elements within the budget

#### Adding TBN(s) to Project Personnel

CSU's system has been pre-loaded with a variety of **"To Be Named"** (TBN) positions, such as Post Docs, GRAs, Admin Pro, Non-student Hourly, Student Hourly, etc. This allows for granular budgeting for project personnel who are not yet hired at the time of proposal, but will be necessary to completing the project work. System functionality allows adding multiples of each type, to accommodate different appointment types and base salary information, which can vary by college or the intended project objective for the TBN's effort.

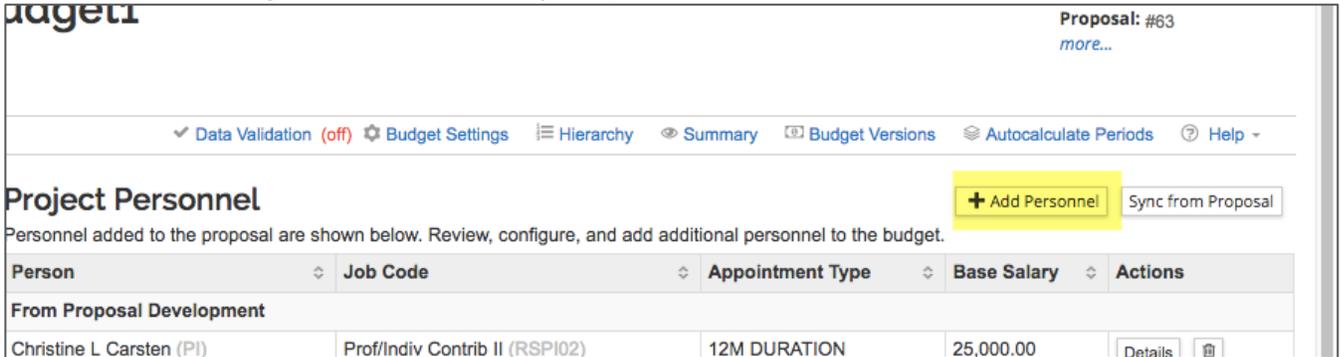
#### To add TBN to Project Personnel via "To Be Named" Search:

1. While in the Budget, click the **Personnel Cost** down arrow → to show the **Project Personnel** link in the **Navigation** panel. Click the link to open the **Project Personnel** section.



**Figure 1 – Project Personnel Subpanel**

2. While in the **Project Personnel** subpanel, click the **Add Personnel** button.



**Figure 2 Add New Persons to the Project**

3. The **Add Personnel** window will open.

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## Add Personnel

**Search for \*** To Be Named

Select the quantity of each 'to be named' person category to be returned to your budget.

Person Category	Quantity
TBN Admin. Pro.	<input style="width: 80px;" type="text" value="0"/>
TBN CSU Assoc./Fed Employee	<input style="width: 80px;" type="text" value="0"/>
TBN Emeritus	<input style="width: 80px;" type="text" value="0"/>
TBN Faculty	<input style="width: 80px;" type="text" value="0"/>
TBN First Year Faculty	<input style="width: 80px;" type="text" value="0"/>
TBN First Year PostDoc	<input style="width: 80px;" type="text" value="0"/>
TBN GRA	<input style="width: 80px;" type="text" value="0"/>
TBN Non-Student hourly	<input style="width: 80px;" type="text" value="0"/>
TBN PostDoc	<input style="width: 80px;" type="text" value="0"/>

**Figure 3 – Adding TBN**

4. In the **Add Personnel** window:
  - a. From the **Search for** drop-down field, select “To Be Named”
  - b. Click the **Search** button
  
5. A list of all available TBN personnel types will open in a light box. Enter the number of persons of this type you want to budget for (this allows you to enter different salaries for the same type of TBN as needed). **After entering the desired quantities**, click the **Add TBN Personnel to Budget** button. In this example the project added (1) new TBN Post Doc.

Person Category	Quantity
TBN Admin. Pro.	<input type="text" value="0"/>
TBN CSU Assoc./Fed Employee	<input type="text" value="0"/>
TBN Emeritus	<input type="text" value="0"/>
TBN Faculty	<input type="text" value="0"/>
TBN First Year Faculty	<input type="text" value="0"/>
TBN First Year PostDoc	<input type="text" value="0"/>
TBN GRA	<input type="text" value="0"/>
TBN Non-Student hourly	<input type="text" value="0"/>
<b>TBN PostDoc</b>	<input type="text" value="1"/>
TBN State Classified	<input type="text" value="0"/>
TBN Student hourly	<input type="text" value="0"/>
TBN Workstudy	<input type="text" value="0"/>

Add TBN Personnel to Budget
Cancel

**Figure 4 Adding a To Be Named Person**

Project Personnel

+ Add Personnel
Sync from Proposal

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

Person	Job Code	Appointment Type	Base Salary	Actions
<b>From Proposal Development</b>				
Christine L Carsten (PI)	Prof/Indiv Contrib II (RSP102)	12M DURATION	25,000.00	Details
Tracey T Trujillo (COI)	Prof/Indiv Contrib II (RSP102)	12M DURATION	25,000.00	Details
Eleanor Diane Barrett (KP)	Senior Management I (RSSM01)	12M DURATION	25,000.00	Details
<b>Other Personnel</b>				
TBN PostDoc - 1	PostDoc TBN (TBNPD)	12M DURATION	0.00	Details

**Figure 5 Adding a new TBN Post Doc**

6. The selected TBN(s) will be added to the **Project Personnel** section where you will need to update the details for each of them, if applicable, per the instructions described in the next section (**Updating Project Personnel Details**). See results below.

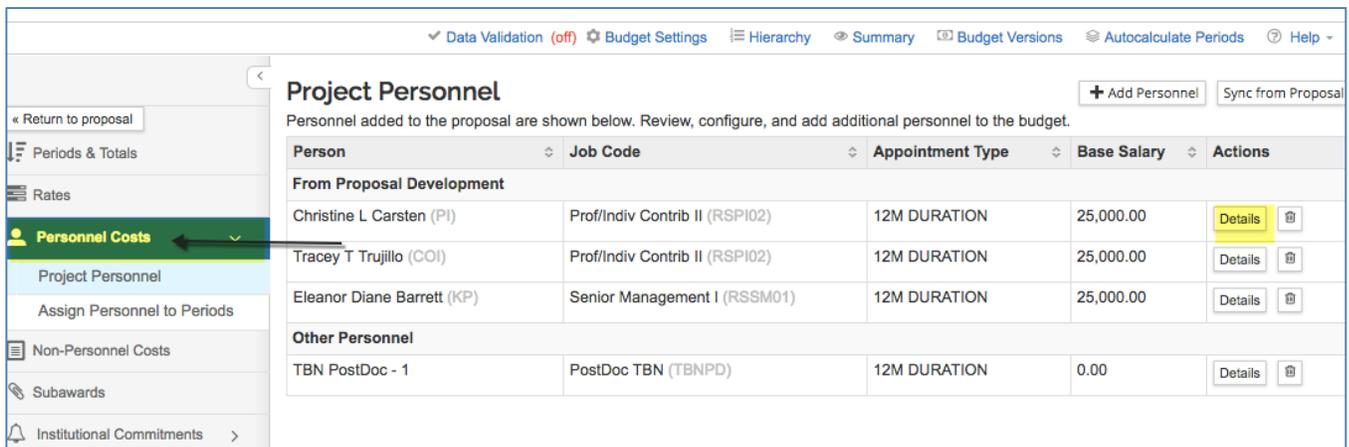
 **Note:** Base Salary and Appointment Type may be edited in the details window.

## Updating Project Personnel

The next step in the Personnel budgeting process is to update the **Project Personnel** screen with the required information.

### To update the Project Personnel information:

1. While in the Budget, click the **Personnel Cost** panel → **Project Personnel** subpanel in the **Navigation** panel. The **Project Personnel** screen will open.



**Figure 6 – Project Personnel Subpanel**

2. For each individual that will be included in the Proposal Budget, click the **Details** button to update the following fields/information in the **Edit Personnel** window → **Details** tab:

Edit Personnel
✕

Christine L Carsten

Details

Salary by Period

**Details**

**Role:** Principal Investigator

**Job Code: \***  🔍

**Job Title:** Prof/Indiv Contrib II

**Appointment Type:**  ⌵

**Salary Effective Date:**  📅

**Salary Anniversary Date:**  📅

**Base Salary:**

**Figure 7 – Edit Personnel Window**

Field Name	Description
<b>Job Code</b>	For named personnel, this data element is pulled from the HR record.
<b>Appointment Type</b>	For named personnel, this data is pulled from the employee's HR record. It can be changed if necessary for budgeting. For TBN personnel, will default to 12-month appointment, but can be changed as needed for budgeting.
<b>Salary Effective Date</b>	<p>The <b>Salary Effective Date</b> is the date of the employee's last annual salary increase. The System uses the Effective Date to calculate salary inflation and it will automatically default the Salary Effective Date field to the start date of the proposal.</p> <p>The information can be changed as needed to match the date of the</p>

Field Name	Description
	<p>employee's last annual salary increase.</p> <p>This is important for calculating inflations, if a budget will apply a 3% inflation rate, that salary will increase 3% for the next budget period, automatically and the salary effective date is used in the inflation calculation.</p>
<b>Base Salary</b>	<p>The <b>Base Salary</b> is the individual's current base salary as of the Effective Date entered in the <b>Salary Effective Date</b> field. (This is the annual salary as of the date of the last salary increase based on Appointment Type selected).</p> <p>For example, if you enter a base salary of \$90,000 for an individual with a 9M Duration (i.e. 9-month appointment), salary calculations will be based on \$10,000 per month.</p>

**Table 1 – Edit Personnel Fields**

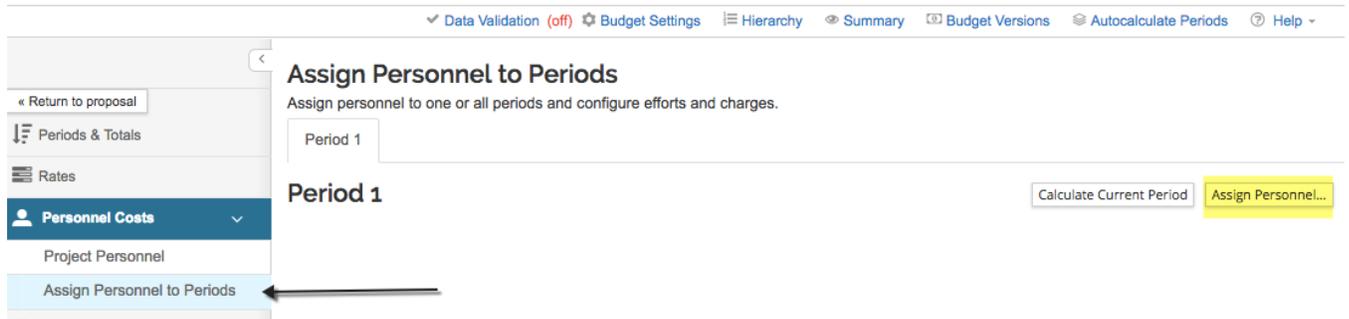
3. Click the **Save Changes** button to capture the changes you made to the individual's information and to close out of the **Edit Personnel** window.
4. Click the **Save** button at the bottom of the **Project Personnel** screen.
5. Repeat these steps to update the information for the other Project Personnel.

### **Adding Personnel Cost Elements**

Once the Project Personnel information has been set-up, you are now able to budget for your personnel.

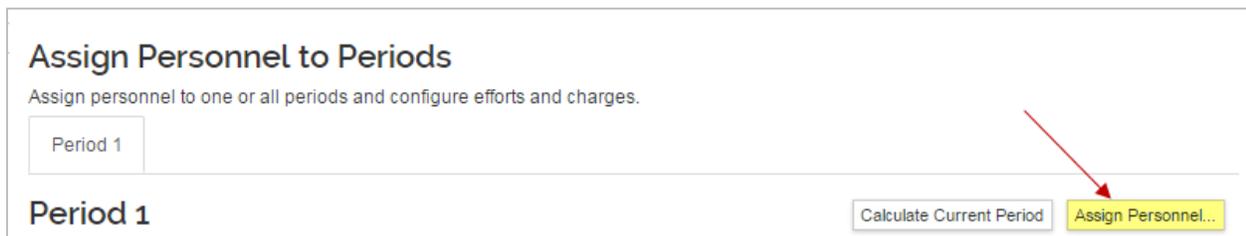
**To add Personnel Cost Elements:**

1. While in the Budget, click the **Personnel Cost** → **Assign Personnel to Periods** in the **Navigation** panel. The **Assign Personnel to Periods** screen will open with Period tabs displayed at the top. If there are multiple budget periods, system will default to Period1.



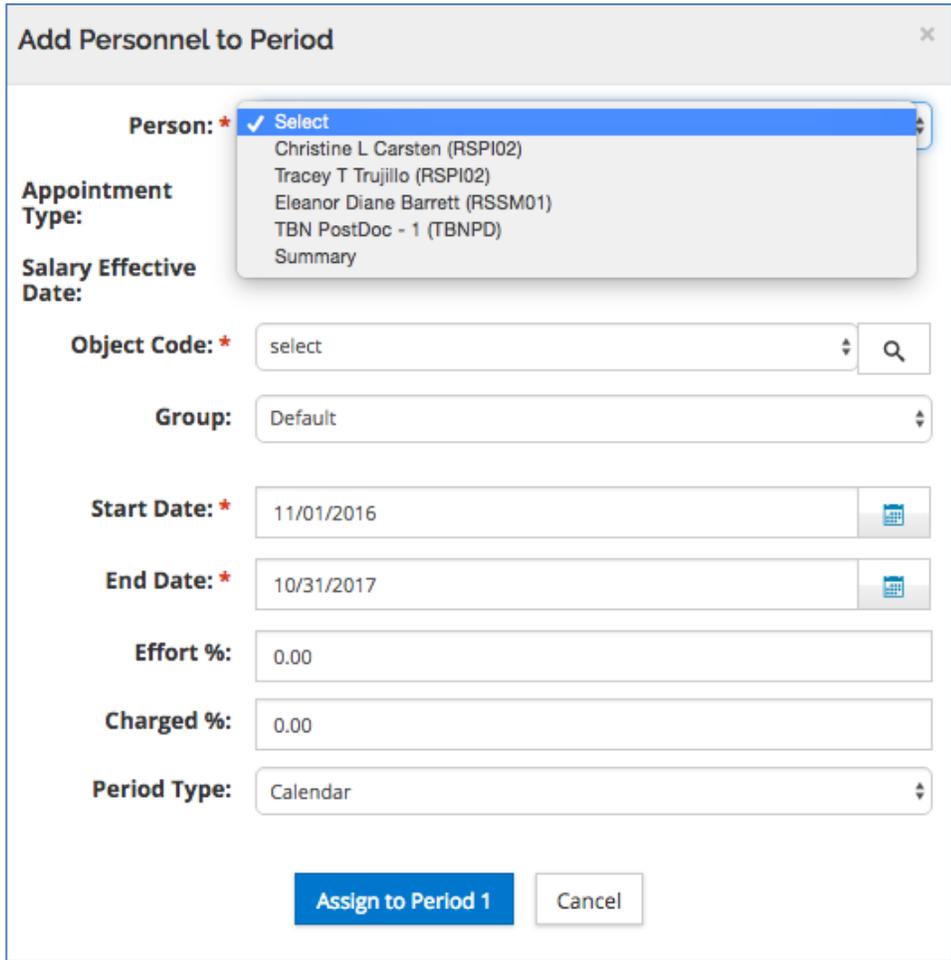
**Figure 8 – Assign Personnel to Periods Subpanel**

2. In the **Assign Personnel to Periods** screen, click the **Assign Personnel...** button.



**Figure 9 – Assign Personnel... Button**

The **Add Personnel to Period** window will appear.



**Figure 10 – Assign Personnel to Period Window**

3. Complete the fields as described below:

Field Name	Description
<b>Person</b>	<p>Select one of the persons to apply to the budget period.</p> <p> <b>Note:</b> <b>Summary</b> can be used to add a lump sum of a salary type to be selected in the Object Code menu. This can be used in lieu of adding multiple TBN types when the number of those personnel are not identifiable at the time of proposal.</p>

<b>Field Name</b>	<b>Description</b>
<b>Object Code</b>	Displays the available types of salary cost elements. Select the appropriate code for the project person selected in the Person column. Click the lookup icon to open the full list of potential cost elements in a separate window.
<b>Group</b>	Groups are useful if you will have multiple persons with similar special conditions, such as no inflation, or submit/do not submit cost sharing details. Can also be used if a named person needs to be added more than once for special budgeting scenarios (e.g., task budget).
<b>Start Date</b>	If the <b>Start Date</b> is not the same as the budget period start, enter the appropriate date or use the calendar tool to select a date. It may be appropriate to change one of these dates to compensate for such occurrences as academic appointments, vacation eligible time, or a late start on the project.
<b>End Date</b>	If the <b>End Date</b> is not the same as the budget period end, enter the appropriate date or use the calendar tool to select a date.
<b>Effort %</b>	Click in the <b>Effort %</b> field to enter the percentage effort this person will charge to the project.
<b>Charged %</b>	Click in the <b>Charged %</b> field to enter the percentage of the person's salary to be charged to the project. (This field cannot be greater than <b>% Effort</b> . Amounts less than Effort % will result in Cost Sharing.)
<b>Period Type</b>	Select a <b>Period Type</b> . <b>Note:</b> The Period Type should normally correspond to the person's appointment type. For example, faculty with 9 month Academic appointments should not be budgeted with a calendar period type.

**Table 2 – Add Personnel to Period Fields**

4. After completing the **Add Personnel to Period** window, click the **Assign to Period 1** button.
5. **Assign Personnel to Periods** screen will now appear and see the added individual.

### Assign Personnel to Periods

Assign personnel to one or all periods and configure efforts and charges.

**Period 1**

Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe	Actions
Summer Faculty - On								<a href="#">Details &amp; Rates</a>
Haskell, Edward	06/01/2016	08/31/2016	10.00	10.00	Summer	3120.00	717.60	<input type="button" value="Details"/> <input type="button" value="✕"/>

**Figure 11 – Added Personnel Cost**

6. Click the **Save** button at the bottom of the **Assign Personnel to Periods** screen.
7. Repeat these steps to budget for additional Personnel.