Quick Reference Guide Personnel Budgeting – Appointment Type

Overview:

Personnel budgeting for non-12M Appointment Types can be done at least two different ways. Please check with your department or college business officer for additional guidance and/or specific instructions.

NOTE: S2S (System-to-System) proposals using the R&R Detail Budget form must follow s2s instructions (provided separately) if we need to show months for specific period types: academic, summer, calendar.

Procedure:

The system automatically pulls in named personnel's Appointment Type (12M, 9M, etc.) and base salary from the HR system to the **Project Personnel** section.

- You don't need to change the appointment type or annualize the salary for budgeting on a project year basis. The system 'knows' what one month of salary is based on the appointment type.
- Regardless of Appointment Type (e.g., 9M, 10M 12M), a person can be budgeted for a Calendar period type, with only minor effect on total budgeted salary/fringe:

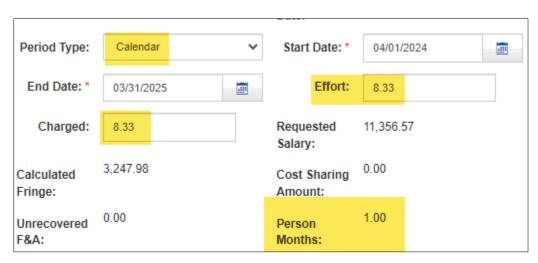


The default information in the **Add Personnel to Period** lightbox is budget start/end dates based on project start/end dates entered in the proposal section and the Calendar period type.

To budget for Calendar Year (CY) with the default information:

- No changes to start/end dates for the budget period need to be made.
- 8.33% = 1 person month



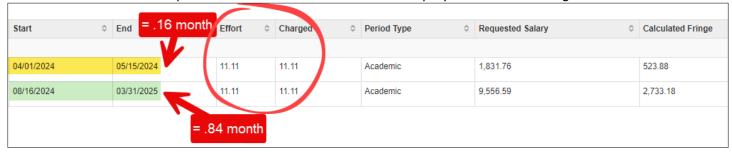


← **NOTE:** Person-month to percent conversion tool is available on the OSP website KR page, in the Links & Tools box.

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To budget for Academic Year (AY) and Summer Session (SS) separately:

- Must create separate line items for each period type
- Must change the start and/or end dates for each line item
- Enter a percent effort that corresponds to the period type
- Academic period = 8/16/yyyy to 5/15/yyyy
 - Multiple lines of entry are required to accommodate the difference between project start/end dates and academic period dates
 - o 1 month = 11.11%
 - The actual person months for each line item display in the **Details** lightbox.



- Summer period = 5/16/yyyy to 8/15/yyyy
 - o 1 month = 33.33%

Start 0	End	\$	Effort	0	Charged 0	Period Type	Requested Salary 0	Calculated Fringe
05/16/2024	08/15/2024		33.33		33.33	Summer	11,274.86	3,224.61

Note: Inflation is automatically applied at the system-defined 'applicable' rate on 7/1 within each project period. This will cause discrepancies between the resulting amounts for the different strategies. Inflation can be turned off with the **Apply Inflation** checkbox in the **Details & Rates** lightbox for a salary category (e.g., faculty).



Comparison with inflation applied:

Budgets The following budgets are linked to this proposal. Period 1 amounts - 4/1/2024 to 3/31/2025 // 3% inflation at 7/1/2024										
Name	Version≎	Direct Cost 💠	F&A ≎	Total 0	Start 0	End ≎	Status 0	Comments		
Calendar year - 1 month	1	14,604.55	7,868.61	22,473.16	04/01/2024	03/31/2029	Incomplete	1 month = 8.33% = 4/1/2024 - 3/31/2025		
Academic year - 1 month	2	14,645.41	7,896.75	22,542.16	04/01/2024	03/31/2029	Incomplete	1 month = 11.11% in two line items = 4/1/2024 to 5/15/2024 + 8/16/2024 to 3/31/2025		
Summer session - 1 month	3	14,499.47	7,793.61	22,293.08	04/01/2024	03/31/2029	Incomplete	1 month = 33.33% for 5/16/2024 to 8/15/2024		
salary/fringe differences: AY vs. CY = \$40.86 CY vs. SS = \$105.08 F&A differences AY vs. CY = \$28.14 CY vs. SS = \$75.00										