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.

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:** 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.

### Costs and Calculation:

<table>
<thead>
<tr>
<th>Period 1 amounts, 4/1/2024 - 3/31/2025 // no inflation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Calendar year - 1 month</td>
</tr>
<tr>
<td>Academic year - 1 month</td>
</tr>
<tr>
<td>Summer session - 1 month</td>
</tr>
</tbody>
</table>

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

| Calculation Fringe: 3,247.98 |
| Unrecovered F&A: 0.00 |
| **Requested Salary**: 11,356.57 |
| **Cost Sharing Amount**: 0.00 |
| **Person Months**: 1.00 |

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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
  - 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**
  - 1 month = 33.33%

**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**
  - **Period 1 amounts - 4/1/2024 to 3/31/2025 // 3% inflation at 7/1/2024**
  - **Calendar year - 1 month**
    - 14,654.55
    - 7,986.61
    - 22,641.16
    - 0.00
    - 0.00
    - 0.00
    - 0.00
    - Incomplete
    - 1 month = 33.33% of 4/1/2024 - 3/31/2025
  - **Academic year - 1 month**
    - 14,654.41
    - 7,886.75
    - 22,542.16
    - 0.00
    - 0.00
    - 0.00
    - 0.00
    - Incomplete
    - 1 month = 11.11% in two line items = 4/1/2024 to 5/15/2024 + 6/1/2024 to 3/31/2025
  - **Summer session - 1 month**
    - 14,489.47
    - 7,763.61
    - 22,243.08
    - 0.00
    - 0.00
    - 0.00
    - 0.00
    - 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