



**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:

Budgets										
The following budgets are linked to this proposal. <span style="color: red;">Period 1 amounts, 4/1/2024 - 3/31/2025 // no inflation</span>										
Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments		
Calendar year - 1 month	1	14,283.18	7,695.07	21,978.25	04/01/2024	03/31/2029	Incomplete	1 month = 8.33% = 4/1/2024 - 3/31/2025		
Academic year - 1 month	2	14,287.46	7,703.45	21,990.91	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	14,287.46	7,679.13	21,966.59	04/01/2024	03/31/2029	Incomplete	1 month = 33.33% for 5/16/2024 to 8/15/2024		

differences: salary/fringe = \$4.28 | F&A max diff = \$24.32 | Total diff CY v. AY = \$12.66, max diff = \$24.32

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

<b>Period Type:</b>	Calendar	<b>Start Date: *</b>	04/01/2024
<b>End Date: *</b>	03/31/2025	<b>Effort:</b>	8.33
<b>Charged:</b>	8.33	<b>Requested Salary:</b>	11,356.57
<b>Calculated Fringe:</b>	3,247.98	<b>Cost Sharing Amount:</b>	0.00
<b>Unrecovered F&amp;A:</b>	0.00	<b>Person Months:</b>	1.00

**Links & Tools**

- [Kuali Research Production environment \(the Real World\)](#)
- [KR PD stakeholder contacts by college](#)
- [Sub-recipient Object Code Calculation Tool](#)
- [Person-month to Percent Effort Conversion Tool](#)
- [CSU Financial Aid website: Tuition & Fees](#)

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



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.

Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe
04/01/2024	05/15/2024	11.11	11.11	Academic	1,831.76	523.88
08/16/2024	03/31/2025	11.11	11.11	Academic	9,556.59	2,733.18

*Annotations: A red circle highlights the Effort and Charged columns. A red box above the first row says "= .16 month" with an arrow pointing to the Effort cell. A red box below the second row says "= .84 month" with an arrow pointing to the Effort cell.*

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

Start	End	Effort	Charged	Period Type	Requested Salary	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).

**Inflation Rates**

Description	Start Date	Institution Rate	Applicable Rate
Research Staff	07/01/2017	3.00	3.00

**Apply Inflation:**  uncheck to stop inflation calculation

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	Start	End	Status	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