

Budget Tool - Unnamed Personnel

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General Notes

This document is intended to describe how to add unnamed personnel to the InfoEd Budget Tool. Capitalized words indicate an object in InfoEd. Italicized words indicate a field or parameter in that object or a reference to another document. Bold is used for emphasis in lists.

Common Objects or Terms in InfoEd

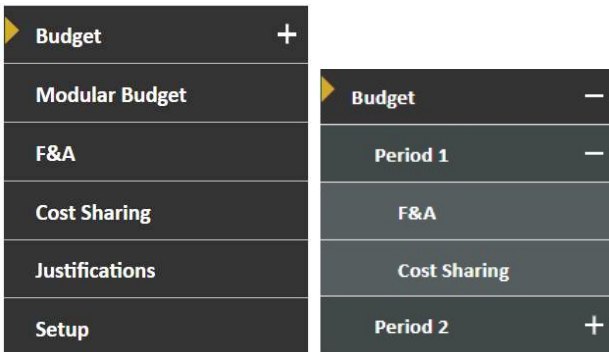
User: A person who can log in and use InfoEd

Portal: The landing page that is first seen after login, a.k.a. the Home page

Record: A generic term for an object in the system such as a Proposal or a COI Disclosure

Widget: A generic term for the white text boxes on the portal screen (a wide variety of widgets are available in InfoEd with additional widgets developed as needed)

Budget Tool Left Navigation Menu



Budget, Modular Budget, F&A, Cost Sharing – These screens are used for all budget data entry. Modular budget is available only when selected on the Setup Questions Screen on the Proposal. See *Budget Tool (07) – Modular Budget* for more information.

Justifications – Budget Justification(s) can be uploaded here. See *Budget Tool (06) – Justifications* for more information.

Setup – The Setup tab controls budget behavior and is used to add or delete budget periods, to change project and/or budget period dates, and to change the PI if needed.

Budget Menu Item

This is the primary budget screen where all types of line items are entered and edited. Clicking the “+” icon on the menu expands the budget item into sub menus for each budget period (see screen shots above). Each period can be expanded further into F&A and Cost Sharing sub menu items. Users are advised to avoid the period-specific sub menus; in most cases all functions on the sub menus can be accessed from the main Budget screen.

Personnel Line Item Section

Initially the PI will be the only Personnel listed. Personnel who will be paid from the award need to be added to the Budget in this section. Personnel added to the Budget here will also automatically appear on the Personnel tab in the Proposal record.

For unnamed (e.g. to-be-determined or TBD) personnel, there are 10 placeholder profiles in InfoEd. They are named Personnel (01) TBD to Personnel (10) TBD. For each unnamed person supported by the proposal, use a distinct TBD Profile.

Adding an Unnamed Personnel Line Item in Budget



1. Start typing “TBD” in the Personnel Name box. Select the first distinct TBD profile. InfoEd will not allow you to add the same TBD profile twice.
2. TBD Profiles should be *Non-Key*.
3. Select appropriate Role for the personnel.
 - Co-PI/PD
 - Faculty
 - Post Doctoral
 - Post Doctoral Associate
 - Post Doctoral Scholar
 - Other Professional
 - Graduate Student
 - Undergraduate Student
 - Technician
 - Consultant
 - Co-Investigator
 - Other (Specify)
4. Click “Add Person” after entering all the information. This will open a new pop-up window of additional details (see below). *Note: There is no bulk entry for adding Personnel on the budget; they must be added one-by-one.

Adding Effort for a Non-Key TBD Profile - Detail Tab

For a TBD profile there will be no appointment data pre-populated. The *Base Salary*, *Fringe Benefit Rate*, and *Inflation* fields will be edited from the Detail tab.

PERIOD	ROLE	NUMBER OF PERSONNEL	EFFORT	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	1	100.000	28,000	560	\$ 28,560
2	Graduate Student	3.00 %	1	28,840	577	29,417
3	Graduate Student	3.00 %	1	29,705	594	30,299
4	Graduate Student	3.00 %	1	30,596	612	31,208
5	Graduate Student	3.00 %	1	31,514	630	32,144
Total				\$ 148,655	\$ 2,973	\$ 151,628

1. When entering a TBD profile, enter 1 in the *Number of Personnel* field for the first period. Tab or click off the field to populate the remaining periods with 1 and adjust outlying periods if needed.
2. Type in the effort/months for Period 1. Typically, this will be 100% effort or 12 calendar person months. Use the tab key or click off the field to populate the same data to the remaining periods.
3. Type in the whole salary that the proposal will be supporting.
4. Click “Save” to apply effort to base salary.
5. Click the triangle in the upper right corner of the *Fringe Benefits* column to see the Fringe Benefit Rate drop down list. Select the correct rate.
6. Click the “Save” button to calculate the *Fringe Benefits* column.
7. Add inflation to the second budget period, if applicable, in the field to the left of the *Number of Personnel* column. Tab or click off the field to apply the same inflation to all periods. Adjust outlying periods as needed. Inflation is applied on the first day of the budget period because no appointment supersedes the inflation application date.
8. When all effort, salary, fringe rates, and inflation has been recorded, click the “Save and Close” button.

Personnel Line Item Detail Screen – Appointments Tab

TBD Profiles will not have an appointment and thus no data on this screen. In certain cases, it may be appropriate to manufacture an appointment, but this is rare. Consult with your Grants Coordinator.

APPOINTMENT	APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS	NET SALARY	DELETE
Annual Inflation: Standard 3%					Total: 0

Personnel Line Item Detail Screen – Justifications Tab

The Justifications tab allows users to input comments regarding specific line items in the budget. In the case of a TBD profile, enter the details that describe the salary and effort for this person. This is an internal reminder to the research team and/or the Grants Coordinator and will not be presented to the sponsor unless so designated on the Justification tab. The comprehensive budget justification document will be uploaded on the Justification screen. See *Budget Tool (06) – Justifications* document for more information.

Personnel Line Item Detail Screen – Cost Sharing Tab

This tab allows user to edit cost share, track sources, and document the nature and type of support. Cost sharing is done by breakdown or build up. See the *Budget Tool (05) - Cost Sharing* document for details on how to use cost sharing.

Budget Period-Specific SubMenu Items

Each period of the Budget can be viewed separately from the others by using the Period-Specific SubMenus. It presents a slightly different format, but many of the functions from the main Budget Menu Item are available here as well. It is recommended to make changes from the main Budget menu item rather than from the Budget Period-Specific SubMenus.

Budget Period-Specific SubMenu – Personnel Costs Section

Requested Period 1

Edit Mode

Rollup Subprojects

Personnel Costs [Hide] Person Months

	NAME	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER		SALARY		FRINGE BENEFITS	TOTAL	
Key Personnel												
<input type="button" value="Detail"/>	PI, John	PD/PI	<input type="text" value="124,372"/>	<input type="text" value="2.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="Cost Sharing"/>	<input type="text" value="20,729"/>	<input type="button" value="Cost Sharing"/>	Faculty/Admin...	<input type="text" value="6,633"/>	\$ 27,362
<input type="button" value="Detail"/>	Coinvestigator, Joe	Co-Investigator	<input type="text" value="92,843"/>	<input type="text" value="0.00"/>	<input type="text" value="1.00"/>	<input type="text" value="3.00"/>	<input type="button" value="Cost Sharing"/>	<input type="text" value="41,956"/>	<input type="button" value="Cost Sharing"/>	Faculty/Admin...	<input type="text" value="13,426"/>	55,382 <input type="button" value="Remove"/>
Non-Key Personnel												
<input type="button" value="Detail"/>	Wisnieski, Stacey	Consultant	<input type="text" value="57,567"/>	<input type="text" value="1.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="Cost Sharing"/>	<input type="text" value="4,797"/>	<input type="button" value="Cost Sharing"/>	Faculty/Admin...	<input type="text" value="1,535"/>	6,332 <input type="button" value="Remove"/>
<input type="button" value="Detail"/>	TBD, Personnel 01	Graduate Student	<input type="text" value="0"/>	<input type="text" value="12.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="Cost Sharing"/>	<input type="text" value="28,000"/>	<input type="button" value="Cost Sharing"/>	Students	<input type="text" value="560"/>	28,560 <input type="button" value="Remove"/>
Total								\$ 95,482			\$ 22,154	\$ 117,636

Begin typing to select Personnel Name... -- Select Type -- -- Select Role --

- For key personnel or named non-key personnel, effort for the selected period can be edited here.
- For TBD personnel, effort and salary can be edited here.
- Clicking the “Detail” button to the left of the person’s name brings up the standard Detail screen with access to all periods, appointment, and cost sharing just as on the main Budget Menu Item screen.
- Clicking the “Cost Sharing” button to the left of the *Salary* or *Fringe* fields brings up a limited cost share screen that allows changes for the selected period only. Note: *Salary* and *Fringe* cost share can be edited SEPARATELY from this screen, which is NOT desirable or typical.
- Adding a person from this screen also brings up the normal Detail screen and adds them to all periods.
- Clicking the “Delete” button to the far right of the personnel line will remove that person from the specific period but DOES NOT remove them from other periods. **This is important where Key Personnel will have zero effort in certain budget periods as zero effort is not allowed.**