

# Budget Tool - Named Personnel

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Created: 10-16-2023

Reviewed: 12-13-2023

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## General Notes

This document is intended to describe how to add named personnel in 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

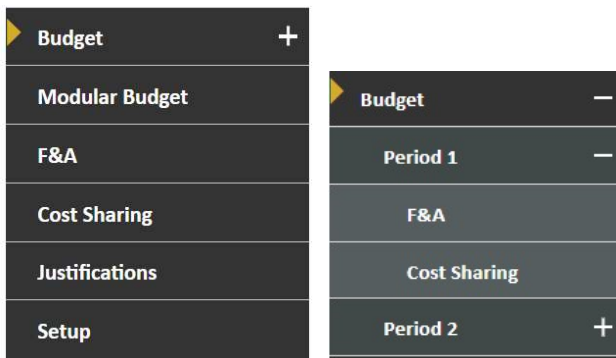
**User:** A person who can log in and use InfoEd

**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.

Personnel [Hide]

NAME	PERIOD 1	PERIOD 2	DIRECT COSTS
Detail Faculty, Nine PD/PI	-	-	\$ 0
Subtotal Personnel:			
	\$ 0	\$ 0	\$ 0

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

## Adding a Personnel Line Item in Budget

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

1. Start typing the personnel name and select the appropriate person from the resulting list.\*\*
2. Select type of personnel as *Key* or *Non-Key*.

### Key Personnel:

- Must have a named profile associated with UToledo.
- Must have effort on the budget.
- Populate the R&R Budget Forms (when applicable and some limits exist depending on form).
- Populate the Senior/Key Persons form (when applicable).
- Have varying business rules regarding biosketches, current/pending support, and Collaborators & Other Affiliations documents (particularly for NIH and NSF).

### Non-Key Personnel

- Can be named or TBD profiles.
- Are included in the budget only by role (individual profile data is not represented within an electronic submission).

- May have biosketches and other documentation uploaded for internal review purposes only, but those documents will not be included in electronic submission to the sponsor.
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.

\*\* If the desired person is not available in InfoEd, send an email to [InfoEd@utoledo.edu](mailto:InfoEd@utoledo.edu) with the requested person’s first and last name, and if possible, Rocket Number, UTAD username, and department.

### Personnel Line Item Detail Screen

The Budget Detail screen pops up automatically after clicking the “Add Person” button or it can be pulled up as needed by clicking the “Detail” button to the left of a person’s name on the Personnel line-item section of the Budget screen. The pop up Detail screen opens on the Detail tab, which displays the calculation for person’s salary, compensated effort, and fringe benefits. For named personnel, the base salary and fringe benefit rate are pulled in from their user profile, which is refreshed each night from Banner.

Budget Detail for: PI, John

Costs by Budget Period Person Months ▾ Show Calculation Details

Labor Object Code  Fringe Object Code

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	
1	Co-PD/PI	<input type="text" value="92,532"/>	<input type="text" value="0.00"/>	<input type="text" value="1.00"/>	<input type="text" value="1.00"/>	<input type="text" value="20,337"/>	<input type="text" value="6,508"/>	<input type="text" value="\$ 26,845"/>	<input type="button" value="Remove"/>
2	Co-PD/PI <input type="text" value="3.00%"/>	<input type="text" value="95,308"/>	<input type="text" value="0.00"/>	<input type="text" value="1.00"/>	<input type="text" value="1.00"/>	<input type="text" value="20,947"/>	<input type="text" value="6,703"/>	<input type="text" value="27,650"/>	<input type="button" value="Remove"/>
3	Co-PD/PI <input type="text" value="3.00%"/>	<input type="text" value="98,167"/>	<input type="text" value="0.00"/>	<input type="text" value="1.00"/>	<input type="text" value="1.00"/>	<input type="text" value="21,576"/>	<input type="text" value="6,904"/>	<input type="text" value="28,480"/>	<input type="button" value="Remove"/>
<b>Total</b>						<input type="text" value="\$ 62,860"/>	<input type="text" value="\$ 20,115"/>	<input type="text" value="\$ 82,975"/>	

Leave the base salary field blank in submission PDFs/XML \*\*Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.

**Person Months/Effort drop down:** Click the drop down in the upper right corner to toggle between percent effort and calendar months. Percent Effort will be across the full year, so must be averaged if effort is different between summer and academic periods.

**Labor Object Code drop down:** The default value for the object code is the Salary Expense Pool. This is correct for most faculty and staff. It may need to be changed for certain situations. Contact your Grants Coordinator for details.

**Fringe Object Code drop down:** The default value is the object code for the Fringe Benefits Expense Pool. This is correct for most faculty and staff. It may need to be changed for certain situations. Contact your Grants Coordinator for details.

## A note about Inflation (Escalation) in InfoEd

When adding a named person with an appointment, InfoEd automatically applies inflation to the salary on July 1. Depending on the start date of the budget period, inflation from the current Banner salary may be applied for budget period 1. Additionally, future escalations will be applied on July 1, so any budget period that spans July 1 will calculate salaries as a proportional blend of the salary prior to July 1 and the inflated salary after July 1. This is a more accurate way to calculate salary as it represents the reality of applied escalations at UToledo and prevents under-budgeting.

## Adding Effort for a Named Key Person - Detail Tab

When using Person Months, personnel with 12-month appointments use the *Calendar* column, and personnel with shorter appointments use the *Academic* and *Summer* columns. For a named person, the *Base Salary*, *Fringe Benefit Rate*, and *Inflation* fields will not be editable from the Detail tab. They are controlled from the Appointments tab.

Budget Detail for: PI, John

Detail | Appointments | Justifications | Cost Sharing

Committed Effort | Save and Close | Save | Close

Costs by Budget Period

Person Months | Show Calculation Details

Labor Object Code: 61002 - Pool - Salary Expense Budget | Fringe Object Code: 63002 - Pool - Fringe Benefits

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL		
1	Co-PD/PI	92,532	0.00	2.00	2.00	40,980	Faculty/Admin...	13,114	\$ 4,094	Remove
2	Co-PD/PI	95,308	0.00	1.00	2.00	31,590	Faculty/Admin...	10,109	41,699	Remove
3	Co-PD/PI	98,167	0.00	1.00	1.00	21,576	Faculty/Admin...	6,904	28,480	Remove
<b>Total</b>						<b>\$ 94,146</b>		<b>\$ 30,127</b>	<b>\$ 124,273</b>	

Leave the base salary field blank in submission PDFs/XML

**\*\*Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.**

1. Type in the effort/months for Period 1. Use the tab key or click off the field to copy the same data to the remaining periods. Change effort/months for outlying periods if needed.
2. Click the "Save" button to apply effort to base salary and calculate *Salary* and *Fringe Benefits* columns.
3. If inflation is to be removed or changed, click the Appointments tab, and select the rate from the drop down or add a manual rate.
4. When all effort and inflation is recorded, click the "Save and Close" button.

**Important Note about Effort: All effort recorded in InfoEd is COMMITTED EFFORT. This means that it will be certified during effort certification. InfoEd and the ORSP will not be tracking uncommitted effort.**

## Adding Effort for a Named but Non-Key Person - Detail Tab

When using Person Months, personnel with 12-month appointments use the *Calendar* column, and personnel with shorter appointments use the *Academic* and *Summer* columns. For a non-key but named person, the *Base Salary*, *Fringe Benefit Rate*, and *Inflation* fields will not be editable from the Detail tab. They are controlled from the Appointments tab.

Budget Detail for: Faculty, Twelve

Detail | Appointments | Justifications | Cost Sharing

Committed Effort | Save and Close | Save | Close

Costs by Budget Period

Person Months | Show Calculation Details

Labor Object Code: 61002 - Pool - Salary Expense Budget | Fringe Object Code: 63002 - Pool - Fringe Benefits

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL		
1	Faculty	1	1.00	0.00	0.00	10,261	Faculty/Admin...	3,284	\$ 13,545	Remove
2	Faculty	1	1.00	0.00	0.00	10,569	Faculty/Admin...	3,382	13,951	Remove
3	Faculty	1	1.00	0.00	0.00	10,886	Faculty/Admin...	3,484	14,370	Remove
<b>Total</b>						<b>\$ 31,716</b>		<b>\$ 10,150</b>	<b>\$ 41,866</b>	

Leave the base salary field blank in submission PDFs/XML

**\*\*Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.**

1. When entering a named but non-key person, 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.
2. Type in the effort/months for Period 1. Use the tab key or click off the field to populate the same data to the remaining periods. Change effort/months for outlying periods if needed.
3. Click the “Save” button to apply effort to base salary and calculate *Salary* and *Fringe Benefits* columns.
4. If inflation is to be changed, click the appointments tab, and select the rate from the drop down or add a manual rate.
5. When all effort and inflation is recorded, click the “Save and Close” button.

**Important Note about Effort: All effort recorded in InfoEd is COMMITTED EFFORT. This means that it will be certified during effort certification. InfoEd and the ORSP will not be tracking uncommitted effort.**

### Personnel Line Item Detail Screen – Appointments Tab

The Appointments tab displays salary information of the selected named person. This tab should only be adjusted by the Grants Coordinator.

Budget Detail for: PI, John

APPOINTMENT		APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS	NET SALARY	DELETE
Type:	CAL	S: 01-Jul-2023	120,000	Faculty/Admin/Str*	158,400	X
Months:	12	E: 30-Jun-2024	Per Appt	Amount: 38,400		
Continue	<input type="radio"/>	Recycle <input checked="" type="radio"/>	End <input type="radio"/>			
Annual Inflation: Standard 3%					Total:	158,400

Apply inflation on the Primary Appointment Anniversary Date

### Personnel Line Item Detail Screen – Justifications Tab

The Justifications tab allows users to input comments regarding specific line items in the budget. 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* for more information.

### Personnel Line Item Detail Screen – Cost Sharing Tab

The Cost Sharing tab allows users to edit cost share, track sources, and document the nature and type of support. See the *Budget Tool (05) - Cost Sharing* help guide for details.

### Personnel Name Link – Edit Personnel Screen

The name of the personnel on the Budget screen is a link that brings up contact information for that person.

Save Close

Contact Information for - John PI

Salutation: Dr. First: John Middle: Last: PI Suffix:

Title:

Address:

City: State: Ohio Zip:

County: Lucas Country: United States

Phone: Fax: Email: jamie.vannatta@utoledo.edu

Sponsor Credential: NIH Commons (Main Campus) jvannatta31

Proposal Element: Prime: P-600078 Department: Test MC Department Personnel Type: Key Role: PD/PI Specified Role: Grants.gov

None of this information is editable from the Budget. See the *Proposal Screens – Personnel* help guide for more information.

## 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	
<b>Key Personnel</b>												
<input type="button" value="Detail"/>	PI, John	PD/PI	124,372	2.00	0.00	0.00	<input type="button" value="Cost Sharing"/>	20,729	<input type="button" value="Cost Sharing"/>	Faculty/Admin...	6,633	\$ 27,362
<input type="button" value="Detail"/>	Coinvestigator, Joe	Co-Investigator	92,843	0.00	1.00	3.00	<input type="button" value="Cost Sharing"/>	41,956	<input type="button" value="Cost Sharing"/>	Faculty/Admin...	13,426	55,382 <input type="button" value="Remove"/>
<b>Non-Key Personnel</b>												
<input type="button" value="Detail"/>	Wisniewski, Stacey	Consultant	57,567	1.00	0.00	0.00	<input type="button" value="Cost Sharing"/>	4,797	<input type="button" value="Cost Sharing"/>	Faculty/Admin...	1,535	6,332 <input type="button" value="Remove"/>
<input type="button" value="Detail"/>	TBD, Personnel 01	Graduate Student	0	12.00	0.00	0.00	<input type="button" value="Cost Sharing"/>	28,000	<input type="button" value="Cost Sharing"/>	Students	560	28,560 <input type="button" value="Remove"/>
<b>Total</b>								\$ 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.**