

Proposals must be completed and routed seven (7) business days before the deadline for OSP to submit the proposal.

Budgeting for Graduate Assistants – Named

Beginning January 2, 2024, proposals must include Graduate Assistantship (GA) health insurance. Below are instructions for adding named Graduate Assistants to the budget.

Budget – Named Non-Key Personnel

To add a current graduate student that is hired in Workday, follow these steps:

- Begin typing last name, first name and then choose from list. Select Type (Non-Key) and Role (Graduate Student) from dropdown options and click Add Person. Detail pop-up will appear. Base salary will populate from Workday and default appointment is calendar.

Personnel [Hide]

NAME	PERIOD 1	PERIOD 2	PERIOD 3	DIRECT COSTS
Tiger, (L17) Mike PD/PI	-	-	-	\$ 0
Subtotal Personnel:				\$ 0

Buttons: Add New Profile, Begin typing to select Personnel Name..., -- Select Type --, -- Select Role --, Add Person

- **If GA will receive calendar health insurance:**
 - Enter the requested person months in the Calendar appointment. Click Save. You will see salary is prorated to number of months entered. In this example, the GA will only work 6 months on the project.

Detail | Appointments | Justifications | Cost Sharing | Effort Periods | Save and Close | Save | Close

Costs by Budget Period | Show Calculation Details

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	1	6.00	0.00	0.00	18,667	0	\$ 18,667
2	Graduate Student	1	6.00	0.00	0.00	18,667	0	18,667
3	Graduate Student	1	6.00	0.00	0.00	18,667	0	18,667
Total						\$ 56,001	\$ 0	\$ 56,001

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.

- Click the Appointments tab to select health insurance type. Under Fringe Benefits column, select type GA Calendar Health/Tuition from dropdown. Click Save. Click the detail tab to return to the Budget details.

- Click the Detail tab. The health insurance will appear in the Fringe Benefits column and be prorated based off the effort. Click Save and Close.

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	1	6.00	0.00	0.00	18,667	GA Calendar H...	1,081
2	Graduate Student	1	6.00	0.00	0.00	18,667	GA Calendar H...	1,081
3	Graduate Student	1	6.00	0.00	0.00	18,667	GA Calendar H...	1,081
Total						\$ 56,001	\$ 3,243	\$ 59,244

- Tuition remission is calculated automatically in the non-Personnel section of the budget.

CATEGORY	PERIOD 1	PERIOD 2	PERIOD 3	DIRECT COSTS
Tuition Remission	\$ 7,093	\$ 7,093	\$ 7,093	\$ 21,280
Subtotal Non-Personnel:	\$ 7,093	\$ 7,093	\$ 7,093	\$ 21,280

- **If GA will receive Academic or Summer health insurance:**
 - Click the Appointments tab and remove the appointment since the appointment for a GA comes from workday as Calendar. Hit Save and go back to the Detail screen.

- Add 1 as the Number of Personnel, enter the months of effort into either the Academic or Summer column and Manually add salary based on the effort. Click Save.

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY
1	Graduate Student	1	0.00	9.00	0.00	23,000
2	Graduate Student	1	0.00	9.00	0.00	23,000
3	Graduate Student	1	0.00	9.00	0.00	23,000
Total						\$ 69,000

- Use the Fringe Benefits drop down to select the applicable Fringe based on the effort stated (GA Academic Health/Tuition or GA Summer Health/Tuition) and hit save.

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	S	\$	TOTAL
1	Graduate Student	1	0.00	9.00	0.00	30	30	\$ 32,397
2	Graduate Student	1	0.00	9.00	0.00	30	30	32,397
3	Graduate Student	1	0.00	9.00	0.00	30	30	32,397
Total						\$ 92,001	\$ 5,190	\$ 97,191

- Now you will see the fringe automatically calculated. Click Save and Close.

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	1	0.00	9.00	0.00	23,000	GA Academic H...	24,730
2	Graduate Student	1	0.00	9.00	0.00	23,000	GA Academic H...	24,730
3	Graduate Student	1	0.00	9.00	0.00	23,000	GA Academic H...	24,730
Total						\$ 69,000	\$ 5,190	\$ 74,190

- Tuition remission is correctly calculated under Non-Personnel costs.

CATEGORY	PERIOD 1	PERIOD 2	PERIOD 3	DIRECT COSTS
Tuition Remission	\$ 8,740	\$ 8,740	\$ 8,740	\$ 26,220
Subtotal Non-Personnel:	\$ 8,740	\$ 8,740	\$ 8,740	\$ 26,220

Budget – Named Key Personnel

To add a current graduate student that is hired in Workday, follow these steps:

- Begin typing last name, first name and then choose from list. Select Type (Key) and Role (Graduate Student or Co-Investigator, as applicable) from dropdown options and click Add Person. Detail pop-up will appear. Base salary will populate from Workday and default appointment is calendar.

Personnel [Hide]

NAME	PERIOD 1	PERIOD 2	PERIOD 3	DIRECT COSTS
Tiger, (L17) Mike PD/PI	-	-	-	\$ 0
Subtotal Personnel:	\$ 0	\$ 0	\$ 0	\$ 0

- If GA will receive calendar health insurance:
 - Enter the requested person months in the Calendar appointment. Click Save. You will see salary is prorated to number of months entered.

Costs by Budget Period

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	37,333	6.00	0.00	0.00	18,667	0	\$ 18,667
2	Graduate Student	37,333	6.00	0.00	0.00	18,667	0	18,667
3	Graduate Student	37,333	6.00	0.00	0.00	18,667	0	18,667
Total						\$ 56,001	\$ 0	\$ 56,001

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.

- Click Appointments tab to select health insurance type. Under Fringe Benefits column, select type GA Calendar Health/Tuition from dropdown. Click Save.

Salary/Payroll Information

APPOINTMENT	APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS	NET SALARY	DELETE
Type: Calendar	S: 01-Jan-2023 E: 31-Dec-2023	37,333 Per Appt	<input type="text" value="Manual Entry"/> <ul style="list-style-type: none"> Employee GA Academic Health/Tuition GA Calendar Health/Tuition GA Summer Health/Tuition Transient 	37,333	<input type="button" value="Delete"/>

Apply inflation on the Primary Appointment Anniversary Date

- Click Detail tab and you will see the health insurance amount is in the Fringe Benefits column. This will be prorated by the effort requested. Click Save and Close.

Costs by Budget Period

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	37,333	6.00	0.00	0.00	18,667	GA Calendar H... 1,081	\$ 19,748
2	Graduate Student	37,333	6.00	0.00	0.00	18,667	GA Calendar H... 1,081	19,748
3	Graduate Student	37,333	6.00	0.00	0.00	18,667	GA Calendar H... 1,081	19,748
Total						\$ 56,001	\$ 3,243	\$ 59,244

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

- Under the Non-Personnel section of the budget, you will see the Tuition Remission amount.

Non-Personnel [Hide]

CATEGORY	PERIOD 1	PERIOD 2	PERIOD 3	DIRECT COSTS
Tuition Remission	\$ 7,093	\$ 7,093	\$ 7,093	\$ 21,280
Subtotal Non-Personnel:	\$ 7,093	\$ 7,093	\$ 7,093	\$ 21,280

- **If GA will receive academic or summer health insurance:**
 - Since the Workday appointment is pulled in as calendar for all Graduate Assistants, you will need to clear the appointment. Go to the Appointments tab and click the blue arrow in the Delete column.

Detail **Appointments** Justifications Cost Sharing Effort Periods Save and Close Save Close

Salary/Payroll Information Refresh From Profile Add Appointment

APPOINTMENT	APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS	NET SALARY	DELETE
Type: Calendar	S: 01-Jan-2023 E: 31-Dec-2023	37,333 Per Appt	Manual Entry Amount: 0	37,333	
Continue <input checked="" type="radio"/>	Recycle <input type="radio"/>	End <input type="radio"/>	Annual Inflation	Total: 37,333	

Apply inflation on the Primary Appointment Anniversary Date

- Go to Details tab, leave base salary blank, enter effort as academic or summer and enter requested salary. In Fringe Benefits column, click Manual Entry.

Detail **Appointments** Justifications Cost Sharing Effort Periods Save and Close Save Close

Costs by Budget Period Show Calculation Details

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	FRINGE BENEFITS	TOTAL	
1	Graduate Student	0	0.00	9.00	0.00	Manual Entry	\$ 23,000	
2	Graduate Student	0	0.00	9.00	0.00	2-Year Postdoc/Intern	23,000	
3	Graduate Student	0	0.00	9.00	0.00	Employee	23,000	
						GA Academic Health/Tuition	23,000	
						GA Calendar Health/Tuition	23,000	
Total						\$ 69,000	\$ 0	\$ 69,000

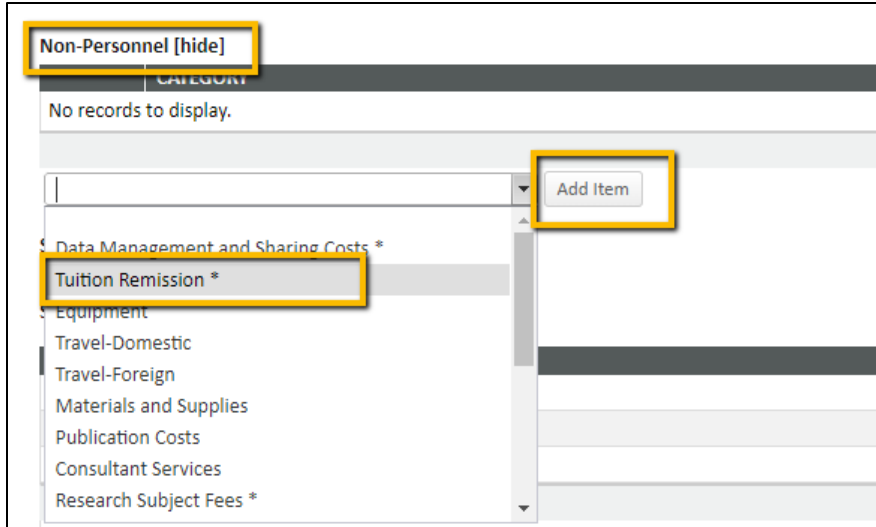
- In the Fringe Benefits column, type in the correct institutional fringe. In the scenario below, we are using the GA Academic rate of \$1730. Click Save and Close.

Detail **Appointments** Justifications Cost Sharing Effort Periods Save and Close Save Close

Costs by Budget Period Show Calculation Details

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	0	0.00	9.00	0.00	23,000	Manual Entry 1,730	24,730
2	Graduate Student	0	0.00	9.00	0.00	23,000	Manual Entry 1,730	24,730
3	Graduate Student	0	0.00	9.00	0.00	23,000	Manual Entry 1,730	24,730
Total						\$ 69,000	\$ 5,190	74,190

- To add Tuition Remission, go to Non-Personnel section of the budget, select Tuition Remission from the dropdown and click Add Item.



- Manually enter Tuition Remission amount as 38% of GA salary. Click Save and Close.

Non-Personnel Costs

Detail Justifications Cost Sharing Show Calculations Save and Close Save Close

Costs by "Budget Period" Annual Inflation *Manual Entry* Description Tuition Remission

PERIOD	START DATE	END DATE		TOTAL	
1	01-Jul-2024	30-Jun-2025		8,740	Remove
2	01-Jul-2025	30-Jun-2026	%	8,740	Remove
3	01-Jul-2026	30-Jun-2027	%	8,740	Remove
Total				\$ 26,220	