

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.

- **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.

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	1	6.00	0.00	0.00	15,334	0	\$ 15,334	<input type="checkbox"/>
2	Graduate Student	1	6.00	0.00	0.00	15,334	0	15,334	<input type="checkbox"/>
Total						\$ 30,668	\$ 0	\$ 30,668	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

- 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	MANUAL*
1	Graduate Student	1	6.00	0.00	0.00	15,334	GA Calendar H...	1,081	\$ 16,414
2	Graduate Student	1	6.00	0.00	0.00	15,334	GA Calendar H...	1,081	16,414
Total						\$ 30,668	\$ 2,162	\$ 32,830	

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

CATEGORY	PERIOD 1	PERIOD 2	DIRECT COSTS
Tuition Remission	\$ 5,827	\$ 5,827	\$ 11,654
Subtotal Non-Personnel:	\$ 5,827	\$ 5,827	\$ 11,654

- **If GA will receive Academic or Summer health insurance:**
 - Since the appointment for a GA comes from workday as Calendar. Hit the Manual override button for the budget periods.

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	0	0.00	0.00	0.00	0	Select Fringe Benefit Scheme	0	0
2	Graduate Student	0	0.00	0.00	0.00	0		0	0
Total						\$ 0	\$ 0	\$ 0	

- 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.

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

Costs by Budget Period Person Months Show Calculation Details

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	1	0.00	2.00	0.00	2,500	0.00	\$ 2,500	<input checked="" type="checkbox"/>
2	Graduate Student	1	0.00	2.00	0.00	2,500	0.00	2,500	<input checked="" type="checkbox"/>
Total						\$ 5,000	\$ 0	\$ 5,000	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

- 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.

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

Costs by Budget Period Person Months Show Calculation Details

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	1	0.00	2.00	0.00	2,500	0.00	\$ 2,500	<input checked="" type="checkbox"/>
2	Graduate Student	1	0.00	2.00	0.00	2,500	0.00	2,500	<input checked="" type="checkbox"/>
Total						\$ 5,000	\$ 0	\$ 5,000	

Manual Entry
2-Year Postdoc/Intern
Employee
GA Academic Health/Tuition
GA Calendar Health/Tuition

Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

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

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

Costs by Budget Period Person Months Show Calculation Details

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	1	0.00	2.00	0.00	2,500	384	\$ 2,884	<input checked="" type="checkbox"/>
2	Graduate Student	1	0.00	2.00	0.00	2,500	384	2,884	<input checked="" type="checkbox"/>
Total						\$ 5,000	\$ 768	\$ 5,768	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

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

Non-Personnel [hide] Add Bulk Entry

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

Progressive text (last name, first name) Key or Non-Key Graduate Student 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.

Budget Detail for: Ostadrahimi, Alireza

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

Costs by Budget Period Person Months Show Calculation Details

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	37,714	2.00	0.00	0.00	6,286	0	\$ 6,286	<input type="checkbox"/>
2	Graduate Student	37,714	2.00	0.00	0.00	6,286	0	6,286	<input type="checkbox"/>
Total						\$ 12,572	\$ 0	\$ 12,572	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

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

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 Months: 12 Continue <input checked="" type="radio"/> <input type="checkbox"/> Apply inflation on the Primary Appointment Anniversary Date	S: 01-Jan-2024 E: 31-Dec-2024 Recycle <input type="radio"/> Annual Inflation	37,714 Per Appt	Manual Entry Employee GA Academic Health/Tuition GA Calendar Health/Tuition GA Summer Health/Tuition Transient	37,714 37,714	X

- 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.

Detail Appointments Justifications Cost Sharing Effort Periods Save and Close

Costs by Budget Period Person Months Show Calculation

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	37,714	2.00	0.00	0.00	6,286	GA Calendar H... 360	\$ 6,646	<input type="checkbox"/>
2	Graduate Student	37,714	2.00	0.00	0.00	6,286	GA Calendar H... 360	6,646	<input type="checkbox"/>
Total						\$ 12,572	\$ 720	\$ 13,292	

**Click Save to calculate salary and fringe benefits. This is required because appointment data
*Increments marked manual will ignore defined appointments for purposes of o

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

Non-Personnel (hide)		PERIOD 1	PERIOD 2	PERIOD 3	DIRECT COSTS
Detail	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 named Graduate Assistants, you will need to manual override the appointment. Click the manual button for each budget period.

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	37,714	0.00	0.00	0.00	0	0	\$ 0	<input checked="" type="checkbox"/>
2	Graduate Student	37,714	0.00	0.00	0.00	0	0	0	<input checked="" type="checkbox"/>
Total						\$ 0	\$ 0	\$ 0	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

- Go to Details tab, enter 0 for the base salary, enter effort as academic or summer and enter requested salary.

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	0	0.00	2.00	0.00	2,500	0	\$ 2,500	<input checked="" type="checkbox"/>
2	Graduate Student	0	0.00	2.00	0.00	2,500	0	2,500	<input checked="" type="checkbox"/>
Total						\$ 5,000	\$ 0	\$ 5,000	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

- In Fringe Benefits column, click select fringe benefit scheme and choose the GA Academic Health/Tuition or GA Summer Health/Tuition based on the effort chosen. In the scenario below, we are using the GA Academic. Click Save and Close.

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	Graduate Student	0	0.00				0	\$ 2,500	<input checked="" type="checkbox"/>
2	Graduate Student	0	0.00				0	2,500	<input checked="" type="checkbox"/>
Total						\$ 5,000	\$ 0	\$ 5,000	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

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

	TUITION REMISSION	SHORT FORM	PERIOD 1	PERIOD 2	TOTAL	
Detail	Tuition Remission		\$ 950	\$ 950	\$ 1,900	Remove