

## QUICK GUIDE

## HOW TO CREATE A GROUP TO BUDGET PERSONNEL USING ON AND OFF CAMPUS INDIRECT COST RATES

**Overview:** Kuali creates groups for personnel on the **Assign Personnel to Periods** page based on their object codes (i.e., PI/Sr. Pers Academic, PI/Sr. Pers Summer). For example, all personnel with summer salary are automatically placed in the same group (PI/Sr. Pers Summer) with the same details and rates. A new group needs to be created for a person that is working off campus so that the budget will reflect the off campus indirect cost rate for that person. In the screenshot below, Gronkowski and Brady are in the same group with the same details and rates. Gronkowski will be working on campus, while Brady will be working off campus during the summer. Gronkowski and Brady need to be placed in separate groups because they need to have different details and rates.

**Assign Personnel to Periods**  
Assign personnel to one or all periods and configure efforts and charges.

Period 1   Period 2   Period 3   Period 4   Period 5

Period 1 Calculate Current Period Assign Personnel...

Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe	Actions
PI/Sr. Pers Summer								<a href="#">Details &amp; Rates</a>
Rob T Gronkowski	06/01/2020	08/31/2020	10.00	10.00	Summer	3,411.11	69.25	<a href="#">Details</a> <a href="#">🗑️</a>
Tom T Brady	06/01/2020	08/31/2020	10.00	10.00	Summer	4,263.89	86.56	<a href="#">Details</a> <a href="#">🗑️</a>

Each person in the same group based on object code (PI/Sr. Pers Summer) → **Group** ← Same Details & Rates option for both people

**STEP 1** – Navigate to **Budget** and open your budget. Go to **Personnel Costs**, then **Assign Personnel to Periods**, the **Assign Personnel** as you normally would. Click **Assign to Period 1**. As you can see below, Gronkowski's group is set to default so the on campus indirect rate will be applied.

**Add Personnel to Period** ✕

Person: \* **Rob T Gronkowski (TSFI)**

Appointment Type: Faculty-Academic Year (9M)

Salary Effective Date: 11/01/2019

Object Code: \* **PI/Sr. Pers Summer** 🔍

Group: **Default**

Start Date: \* 06/01/2020 📅

End Date: \* 08/31/2020 📅

Effort %: 10

Charged %: 10

Requested Salary: 0.00

Period Type: **Summer**

Assign to Period 1 Cancel

**STEP 2** – An off campus indirect cost rate group needs to be created for Brady. In the Add Personnel to Period section, select **Create New Group** in the dropdown list next to **Group**. A New Group Name field will appear under the Group field. Type a name for your new group. Click the **Assign to Period 1** button. Please note that a group can only be created when you initially add the person to the budget. If the person already exists in the budget then you will need to delete them and add them back in and create a new group or select an existing group from the dropdown list.

Add Personnel to Period

Person: \*

Tom T Brady (TSFI)

Appointment Type:

Faculty-Academic Year (9M)

Salary Effective Date:

11/01/2019

Object Code: \*

PI/Sr. Pers Summer

Group:

Create New Group

New Group Name:

Off Campus Indirect Cost Rate

Start Date: \*

06/01/2020

End Date: \*

08/31/2020

Effort %:

10

Charged %:

10

Requested Salary:

0.00

Period Type:

Summer

Assign to Period 1

Cancel

The new group will appear on the **Assign Personnel to Periods** page.

**Assign Personnel to Periods**  
Assign personnel to one or all periods and configure efforts and charges.

Period 1 [Period 2](#) [Period 3](#) [Period 4](#) [Period 5](#)

Period 1 Calculate Current Period Assign Personnel...

Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe	Actions
<b>PI/Sr. Pers Summer (Off Campus Indirect Cost Rate)</b> ← <b>New Group</b> <a href="#">Details &amp; Rates</a>								
Tom T Brady	06/01/2020	08/31/2020	10.00	10.00	Summer	4,263.89	86.56	<a href="#">Details</a>
<b>PI/Sr. Pers Summer</b> <a href="#">Details &amp; Rates</a>								
Rob T Gronkowski	06/01/2020	08/31/2020	10.00	10.00	Summer	3,411.11	69.25	<a href="#">Details</a>

Two Separate groups with same object code (PI/Sr. Pers Summer) →

Separate Details & Rates option →

**STEP 3** – Navigate to and click on the **Details & Rates** hyperlink for your new group (highlighted below in yellow).

**Assign Personnel to Periods**  
Assign personnel to one or all periods and configure efforts and charges.

Period 1 [Period 2](#) [Period 3](#) [Period 4](#) [Period 5](#)

Period 1 Calculate Current Period Assign Personnel...

Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe	Actions
<b>PI/Sr. Pers Summer (Off Campus Indirect Cost Rate)</b> ← <b>New Group</b> <a href="#">Details &amp; Rates</a>								
Tom T Brady	06/01/2020	08/31/2020	10.00	10.00	Summer	4,263.89	86.56	<a href="#">Details</a>
<b>PI/Sr. Pers Summer</b> <a href="#">Details &amp; Rates</a>								
Rob T Gronkowski	06/01/2020	08/31/2020	10.00	10.00	Summer	3,411.11	69.25	<a href="#">Details</a>

The **Details & Rates** dialog box will appear. Under the **General** tab, uncheck **On Campus**. Then click **Save Changes**. The indirect cost rate for Brady is now set to the off campus rate of 26%.

Details & Rates

General

Rates

General

Budget Category: Senior Personnel

Unrecovered F&A: 0.00

Cost Sharing: 0.00

Notes:

Group Description:

# of Persons: 0

Inflation Rates

Description	Start Date	Institution Rate	Applicable Rate
COLA (7/1)	07/01/2019	3.50	3.50
COLA (7/1)	07/01/2020	3.50	3.50

Apply Inflation: ☒

Submit cost sharing: ☒

On Campus: ☐

When this box is unchecked the off campus indirect cost rate will be applied.

Save Changes

Apply To Later Periods

Cancel