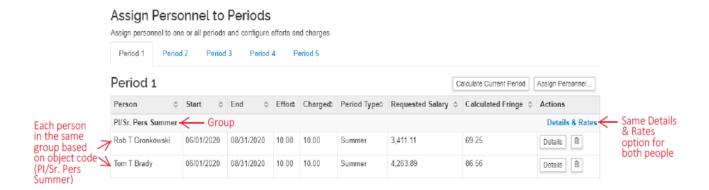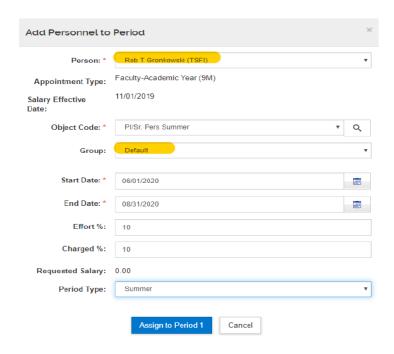# QUICK GUIDE

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.
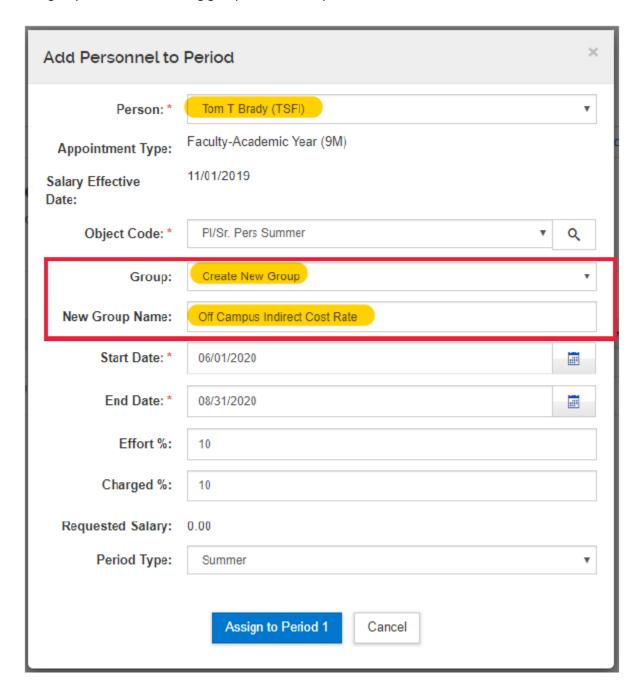

STEP 1 – Navigate to **Budget** and open your budget. Go to **Personnel Costs**, then **Assign Personnel to Periods**, the **Assign Personnel** as you normally would. Click **Assign to Period 1**. As you can see below, Gronkowski's group is set to default so the on campus indirect rate will be applied.
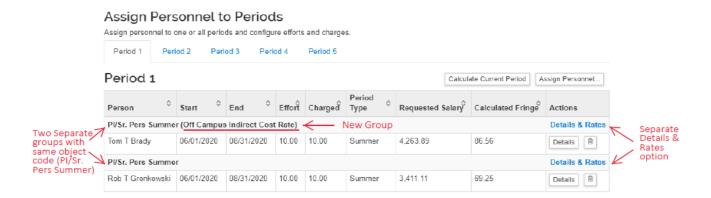
STEP 2 – An off campus indirect cost rate group needs to be created for Brady. In the Add Personnel to Period section, select **Create New Group** in the dropdown list next to **Group**. A New Group Name field will appear under the Group field. Type a name for your new group. Click the **Assign to Period 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 ▾

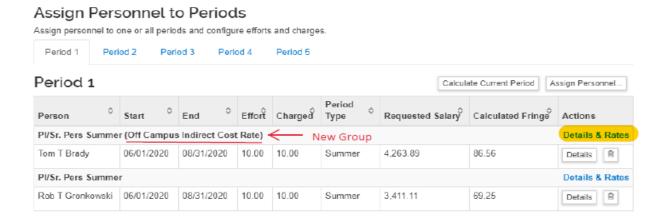**Assign to Period 1**   Cancel

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

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

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%.