

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

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. 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 Remove
2	Graduate Student	1	6.00	0.00	0.00	18,667	0	18,667 Remove
3	Graduate Student	1	6.00	0.00	0.00	18,667	0	18,667 Remove
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.

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 Employee GA Academic Health/Tuition GA Calendar Health/Tuition GA Summer Health/Tuition Transient	37,333 37,333	

☐ Apply inflation on the Primary Appointment Anniversary Date

- 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.

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	GA Calendar H...	1,081	\$ 19,748 Remove
2	Graduate Student	1	6.00	0.00	0.00	18,667	GA Calendar H...	1,081	19,748 Remove
3	Graduate Student	1	6.00	0.00	0.00	18,667	GA Calendar H...	1,081	19,748 Remove
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.

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


Non-Personnel [hide] Add Bulk Entry

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.

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"/> Recycle <input type="radio"/> Annual Inflation <input type="text"/>	S: 01-Jan-2023 E: 31-Dec-2023 End <input type="radio"/>	30,667 Per Appt	GA Academic He... Amount: 0	30,667 Total: 30,667	

☐ Apply inflation on the Primary Appointment Anniversary Date

- 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

Costs by Budget Period

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.

Costs by Budget Period

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	\$	\$	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.

Costs by Budget Period

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	1	0.00	9.00	0.00	23,000	1,730	\$ 24,730
2	Graduate Student	1	0.00	9.00	0.00	23,000	1,730	24,730
3	Graduate Student	1	0.00	9.00	0.00	23,000	1,730	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.

The screenshot shows the 'Costs by Budget Period' table with columns: PERIOD, ROLE, BASE SALARY, CALENDAR, ACADEMIC, SUMMER, SALARY, FRINGE BENEFITS, and TOTAL. Three rows are visible for 'Graduate Student' with a base salary of 37,333. The 'CALENDAR' column is highlighted with a yellow arrow. The total salary is \$56,001 and fringe benefits are \$0.

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

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

The screenshot shows the 'Appointments' tab with fields for Appointment Type (Calendar), Start Date (01-Jan-2023), End Date (31-Dec-2023), and Months (12). The 'Fringe Benefits' dropdown menu is open, showing options: Manual Entry, Employee, GA Academic Health/Tuition, GA Calendar Health/Tuition, GA Summer Health/Tuition, and Transient. 'GA Calendar Health/Tuition' is selected.

- 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.

The screenshot shows the 'Detail' tab with the 'Costs by Budget Period' table. The 'FRINGE BENEFITS' column is highlighted with a yellow box, showing 'GA Calendar H...' with a value of 1,081. The total salary is \$56,001 and fringe benefits are \$3,243, resulting in a total of \$59,244.

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

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

The screenshot shows the 'Non-Personnel' section with a table listing categories and their costs across four periods. 'Tuition Remission' is highlighted with a yellow box.

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 Months: 12 Continue <input checked="" type="radio"/> Recycle <input type="radio"/> <input type="checkbox"/> Apply inflation on the Primary Appointment Anniversary Date	S: 01-Jan-2023 E: 31-Dec-2023 Annual Inflation <input type="text"/>	37,333 Per Appt	Manual Entry Amount: 0	37,333 Total: 37,333	

- 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 Remove
2	Graduate Student	0	0.00	9.00	0.00	2-Year Postdoc/Intern	23,000 Remove
3	Graduate Student	0	0.00	9.00	0.00	GA Academic Health/Tuition	23,000 Remove
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 Remove
2	Graduate Student	0	0.00	9.00	0.00	23,000	Manual Entry 1,730	24,730 Remove
3	Graduate Student	0	0.00	9.00	0.00	23,000	Manual Entry 1,730	24,730 Remove
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.

Non-Personnel [hide]

No records to display.

Add Item

Data Management and Sharing Costs *

Tuition Remission *

Equipment

Travel-Domestic

Travel-Foreign

Materials and Supplies

Publication Costs

Consultant Services

Research Subject Fees *

- 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
2	01-Jul-2025	30-Jun-2026	8,740
3	01-Jul-2026	30-Jun-2027	8,740
Total			\$ 26,220