

## **Removing Appointments (Salary) from the Budget**

Employee salary information pulls from Workday directly into their GeauxGrants profile. When creating a budget, the salary information will automatically appear for the majority of LSU employees and calculate based on the appointment type and effort. Fringe benefits and graduate student tuition remission will also calculate based on the appointment type. However, if a PI is requesting a flat amount for salary or an anticipated raise in year 1, then you will need to remove the "Appointment" information and manually enter.



<sup>F</sup> If the budget is Completed, click "Un-Complete Budget" to edit.

Done Save test (L13)	Mike the Tiger (LA Board of Regents (BOR))					Proposal AM200070
▶ Budget —	Project Period:	Source View:	Rollup subprojects:	Proposal Structure	Imnort/Export	View Mode
Period 1 +	01-Apr-2020 to 01-Apr-2022	Sponsor 🔻 🚳	Not Rollup 🔻 🚱			
Period 2 +	Budget Summary [Hide]					

1) In Proposal Development (PD), click on the Budget tab. Next click on "Detail" next to the personnel you wish to edit.

Budget – Period 1 + Period 2 +	Project Period: 01-Apr-2020 to 01-Apr-2022 Budget Summary [Hide]	Source	View: or •		Rollup Not R	subprojects: ollup v	
F&A			Periods [hid	e]			
	YEAR/PERIOD	INCREMENT	START	END	TYPE	STATUS	
Cost Sharing	1	1	01-Apr-2020	31-Mar-2021	New*	Proposed	
1	2	2	01-Apr-2021	01-Apr-2022	New*	Proposed	
Justifications						To	otal:
Versions	Subproject Summary [Show]						
Setup	Personnel [Hide]						
	NAME						
	Detail Tiger, (L13) Mike	PD/PI					

2) The Budget Detail for the personnel will open. Click on the "Appointments" tab.

Budget Deta	il for: Tiger,	(L13) Mil	ke												
<u>Detail</u>	Appointm	nents	Justifica	ations	Cost Sha	aring Ef	fort Periods				Committe	ed Effort Sa	ve and Close	Save Clo	lose
Costs by Budget Period Person Months												ls			
PERIOD	ROLE			BASE S	ALARY	CALENDAR	ACADEMIC	SUMMER		SALARY		FRINGE BEI	NEFITS	TOT	TAL
1	PD/PI			75	5,000	0.00	0.00	0.00		0	<u>Employee</u>		0	:	\$0
2	PD/PI	Z	96	75	5,000	0.00	0.00	0.00		0			0		0
								Total		<b>\$ 0</b>			<b>\$ 0</b>		\$ O
							**Click Save to	o calculate salar	ry and fringe	e benefits. 1	This is required	because app	ointment dat	ta is being us	sed.

3) To remove the preloaded appointment from Workday, click the blue arrow under the Delete column. This will remove the salary from this budget, but not from GeauxGrants.

Budget Detail for: Tiger, (L13) I	Mike Justifications Cost Sharing Ef	fort Periods	Committed Effort	Save and Close Save Close
Salary/Payroll Information		I	Refresh From	Profile Add Appointment
APPOINTMENT	APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS NET S	ALARY DELETE
Type: Calendar Months: 12	s: 01-Jan-2019	75,000           Per Appt ▼	Employee   Amount: 33,000	108,000
Continue 🔘	Recycle  Annual Inflation	End O	Total:	108,000
Apply inflation on the Principal Apply inflation	imary Appointment Anniversary Date			

4) Go back to the "Detail" tab. Do not enter Base Salary. Enter the yearly effort and the yearly salary requested. Click Save.



**Do no enter the Base Salary.** Removing the appointment, defaults to a 12-month calculation for effort and fringe benefits.

Budget Detail for: Tiger, (L13) Mike											
Detail Appointments Justifications Cost Sharing Effort Periods Save and Close Save											
Costs by Budget Period	Costs by Budget Period Person Months   Show Calculation Dev										
PERIOD ROLE BASE SALARY	CALENDAR ACADEMIC SUMMER SALARY	FRINGE BENEFITS TOTAL									
1 PD/PI 0	0.00 0.00 1.00 9,516	0 \$ 9,516									
2 PD/PI 🗾 %	0.00 0.00 1.00 9,516	0 9,516									
Leave blank.	total \$ 19,03	2 \$0 \$19,032									

5) In order to calculate the appropriate fringe benefit or tuition remission (graduate students), you will need to click on the triangle next to Fringe Benefits and then select the correct fringe or tuition remission type from the drop down.

Budget Detai	l for: Tiger, (L13) Mil	ke										
<u>Detail</u>	Appointments	Justifications	Cost Sharing	Effort Pe	eriods		<b>(</b> ) Co	ommitted Effort Save and Close	Save Close			
Costs by Bu	Costs by Budget Period Person Months <b>v</b> Show Calculation Details											
PERIOD	ROLE	BAS	E SALARY CA	ALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL			
1	PD/PI		0	0.00	0.00	1.00	9,516	o	\$ 9,516			
2	PD/PI	%	0	0.00	0.00	1.00	9,516	0	9,516			
						Total	\$ 19,032	\$ O	\$ 19,032			

- 6) Choose the appropriate fringe type from the dropdown list.
  - a. Faculty and Staff = Employee
  - b. Graduate Students = Tuition Remission FY20 for proposals submitted after 7/1/2019. Tuition remission will populate under Non-Personnel.
  - c. 2-Year Postdoctoral Researcher job code = 2-Year Postdoctoral Researcher
  - d. Transient, Continent Workers, WAEs = Transient

Budget Detail for: Tiger, (L13) Mike													
Detail Appointme	ents Justifications	Cost Sharing	Effort Periods		Committed Effort	Save and Close	Save Close						
Costs by Budget Period	Costs by Budget Period Person Months   Person Months												
PERIOD ROLE	BA	ASE SALARY CALE	NDAR ACADE	MIC SUMMER		- 15	TOTAL						
1 PD/PI		0.0	0.00	1.00	2-Year Postdoctoral Researcher		\$ 9,516						
2 PD/PI	<b>*</b> _%	0 0.0	0.00	1.00	Transient	0	9,516						
				Total	Tuition Remission FY19 Tuition Remission FY20	÷0	\$ 19,032						

7) Click Save and Close.

1	Budget Detail for: Tiger, (L13) Mike													
Detail         Appointments         Justifications         Cost Sharing         Effort Periods         Committee Effort         Save and Close											Save Close			
	Costs by Budget Period Person Months  Show Calculation Details											lculation Details		
	PERIOD	ROLE			BASE	SALARY	CALENDA	R ACADEMIC	SUMMER		SALARY		FRINGE BENEFITS	TOTAL
	1	PD/PI				0	0.00	0.00	1.00		9,516	<u>Employee</u>	4,187	\$ 13,703
	2	PD/PI	z	%		0	0.00	0.00	1.00		9,516	<u>Employee</u>	4,187	13,703
									Total		\$ 19,032		\$ 8,374	\$ 27,406
1														