Overview:

Describes how to add non-personnel to the budget and assign them to project periods.

Procedure:

**Adding Non-Personnel Budget Costs – Detailed Instructions**

Non-Personnel line items are those items within your budget that do not pay salaries or benefits to people working on the project. Non-Personnel Line Items include travel costs, supplies (such as consumables and reagents), equipment, subcontracts, and other operating expenses.

**Adding Non-Personnel Cost Elements**

1. While in the Budget, click the **Non-Personnel Costs** panel in the **Navigation** panel. The **Non-Personnel Costs** screen will open with the **Period** tabs displayed at the top.

   ![Non-Personnel Costs Panel](image1)

   **Figure 1 – Non-Personnel Cost Panel**

2. In the **Non-Personnel Costs** screen, click the **Assign Non-Personnel** button. The **Add Assigned Non-Personnel** window will appear.

**Note:** Non-Personnel budget line items are assigned by project period.
3. Complete the fields as described below:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category Type</strong></td>
<td>Displays major categories of expense. Choose to narrow the choices for Category and Object Code.</td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>Displays available Non-Personnel Budget Categories (e.g. Equipment, Travel, Participant Support, Other Direct, etc.). Select the Category for the Non-Personnel Line Item you want to add. Choose to narrow the choices for Object Code.</td>
</tr>
<tr>
<td><strong>Object Code Name</strong></td>
<td>Displays the potential cost elements appropriate to the Category selected in the <strong>Category</strong> field. Alternatively, click the lookup icon to open the full list of potential cost elements in a separate window. Locate the appropriate cost elements and click on return value to select the item.</td>
</tr>
<tr>
<td><strong>Total Base Cost</strong></td>
<td>Specify the total amount for the item entered.</td>
</tr>
<tr>
<td><strong>Quantity</strong></td>
<td>Specify the number of the particular item being purchased (e.g. 1). This field can be left blank. Quantity is for information only and has no logic to calculate costs, based on quantity.</td>
</tr>
</tbody>
</table>
Enter text in the **Description** window if needed. Note - **Description is required for Equipment Cost**.

| Description | Enter text in the **Description** window if needed. Note - **Description is required for Equipment Cost**. |

**Table 1 - Add Assigned Non-Personnel Fields**

4. Click the **Add Non-Personnel Item to 1** button.

**Figure 3 – Add Non-Personnel Item to 1**

The system returns to the **Non-Personnel Costs** screen where the user sees the added line item.
Figure 4 – Added Non-Personnel Cost

5. Click the **Save** button at the bottom of the **Non-Personnel Costs** screen.

6. Repeat these steps to budget for additional Non-Personnel budget costs.

**Viewing/Modifying Line Item Details**

In the case where there is **Cost Sharing**, **Underrecovery**, or modify the **On/Off Campus** status for a non-personnel line item in your budget, navigate to the Non-Personnel Line Item Details section to make the necessary adjustments.

**To review and modify the Line Item Details for the Non-Personnel Line Item:**

1. While in the **Non-Personnel Costs** screen, click on the **Details** button in the **Actions** column for the **Line Item** where you want to modify the details. Note, in this example, there are 2 budget periods. System Defaults to Period 1.

![Figure 5 – Line Item Details](image)

2. The **Edit Assigned Non-Personnel** window will open, with tabs (**Details**, **Cost Sharing**, and **Rates**) displayed at the top (Details tab is the default display).
Details Tab:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Modify the <strong>Start Date</strong> if it is not the same as the budget period start. Enter the appropriate date or use the calendar tool to select a date.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>If appropriate, modify the <strong>End Date</strong> if it is not the same as the budget period end. Enter the appropriate date or use the calendar tool to select a date.</td>
</tr>
<tr>
<td><strong>Budget Category</strong></td>
<td>If applicable, click the down-arrow to change the category from the default for this cost element.</td>
</tr>
<tr>
<td><strong>Apply Inflation</strong></td>
<td>If eligible, check/uncheck the <strong>Apply Inflation</strong> check box. This applies to the particular cost element viewing the details for. The default setting is ‘checked’ so inflation applies.</td>
</tr>
<tr>
<td><strong>Submit Cost Sharing</strong></td>
<td>This affects only the mapping of information to S2S forms. <strong>Uncheck</strong> the <strong>Submit Cost Sharing</strong> so this line item’s cost share expense won’t appear on S2S budget forms. (This does <strong>not</strong> eliminate the need to track cost sharing commitments.)</td>
</tr>
</tbody>
</table>

**Cost Sharing Tab:**

![Figure 7 – Edit Assigned Non-Personnel → Cost Sharing Tab](image-url)
Field Name | Description
--- | ---
**Cost Sharing** | If appropriate, enter the contributed amount designated as cost shared.

**Unrecovered F&A** | (Display only). Will populate with the calculated under-recovery, if any.

**Justification Notes** | (Optional). Use this box to enter notes about this cost element. All the notes can be consolidated to provide you with a text document that can aid in preparing your complete budget justification narrative.

Table 2 – Edit Assigned Non-Personnel ➔ Cost Sharing Tab

**Rates Tab:**

The **Rates** tab is used to view and adjust indirect and fringe rate application to the selected cost element. The columns list the rate class, type, the default application, the calculated rate, and calculated cost sharing, if applicable.
Uncheck the box in the "Apply Rate?" Column to un-apply – which may only be relevant for special submissions – Caution: This will become under-recovery.

In addition, users can:

Sync to Period Cost Limit: Click this button to adjust the line item amount, and recalculate the budget, to reconcile to a period cost limit entered in the Parameters tab for this budget period. The value may be increased or decreased, depending on the current budget total. You will be presented with an option to cancel this transaction.

Sync to Period Direct Cost Limit: Click this button to adjust the line item amount, and recalculate the budget, to reconcile to a period direct cost limit entered in the Parameters tab for this budget period. The value may be increased
or decreased, depending on the current budget total. You will be presented with an option to cancel this transaction.

Click the **Save Changes** button or **Save and Apply to Other Periods** button (as appropriate) to save all the information that you entered in the **Edit Assigned Non-Personnel** window.