**Core Concept: Budget Creation Personnel Categories and Line Items**

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| **Script** |
| Welcome to the AmpliFund Core Concept video focused on adding personnel budget categories and line items. |
| In this video we are still focused on creating your budget plan including the categories and line items, today we’ll demonstrate adding personnel line items to a budget. |
| Let’s dive right into AmpliFund and navigate to our grant. We’ll go to Post Award>Financial>Budget. On my budget I’m going to start by adding a Personnel category for $200,000 of our $500,000 budget. |
| Then we’ll jump right to adding a line item to that category. First I’ll change my item type to Personnel. Next I have the option to select the employee this is for. I can either select the name coming from our staff list or I can check the box that I’ll pick at a later date. If you check the box, you still need to enter text in the name field but you can enter a title. |
| Here I’ve selected Addison as the employee, she has a salary entered in the compensation records of $53,000 with $4770 in benefits. Addison is not yet listed on any other grants. It is important to note that Addison’s benefits only show up in here because they are both on the compensation record and we added the applicable benefit types to our budget settings. If you need a refresher on how to add benefit types to your budget settings, watch our Core Concept video on Budget Creation Basics. Since Addison is not yet on any other grants her full salary for 3 years and full benefits are being added to the line item for this grant. You can see that in the “Designation to this Grant” box where it shows 100%. If you want to change the salary or benefits amounts you can edit them directly on this screen. So let’s say only 50% of Addison’s salary and benefits are covered by this grant. I’d then change the “Designation to this grant” to be 0.5. You can see that as I did that the benefits automatically recalculated as did Addison’s designation to this grant. On this screen I still need to select the responsible individual. |
| Most of the tabs are the same as the non-personnel line items, however we also have this benefits tab. On the benefits tab the same salary and benefits info are pre-populated. You can see at the bottom the benefits are pre-populated based on her compensation record and the benefit types we added to this grant. If the benefits are covered at a different percentage you can edit these on this screen. If a particular benefit is not covered by this grant, you can go to the supported benefit types field and click the “x” icon next to benefit type you wish to remove. |
| After I hit save and then add my line items to the view, I can see Addison’s salary and benefits on our budget. Let’s go through a couple of other different examples now. |
| I’m going to add another personnel record to this same grant. This time I’m adding Ryan to the grant. Ryan is already on another grant, that’s currently covering 24% of his salary, so to prevent Ryan from being over-allocated to grants, the amount for his salary and benefits is defaulted to the remaining 76%. I hit save and you can see that I get this error, because with Addison’s and Ryan’s salary the line item amounts take us above our budget for this category. I’ll change Ryan’s salary to $50,000 so we are under budget, as you can see the benefits and allocation re-calculate. |
| Now you can see both Addison’s and Ryan’s salary and benefits on our budget. |
| Since we now have Ryan allocated to two grants, you may want to check his funding details to remind yourself of which grants he is allocated to. You can see this by going to Contacts>Staff>selecting Ryan and then hitting compensation>Funding details. Here under 2024 we can see the two grants Ryan’s salary is covered by. |
| Now, let’s look at one other way to configure personnel line items on your budget. First we are going to go back into our Grant budget settings by navigating to our grant, then going to Post Award>Settings>Budget Settings. On this screen we are currently adding benefits by personnel. |
| Let’s edit the budget settings and change this to Benefit Type. |
| Now let’s go to our budget for this grant, and add a personnel category. |
| Then let’s add 2 line items, one for Alexa and one for Ashley. In the line item entry screen, I have a new item type option for benefit type. First I’ll add Alexa’s Personnel item for her salary. You’ll notice on this screen her benefits don’t appear and there’s no benefits tab. This is because we’ve configured our budget settings to add benefits by benefit type rather than personnel. I’ll add Alexa’s salary. |
| Now on the budget we see Alexa’s salary but again no benefits. Let’s add Ashely’s salary and then we’ll demonstrate how to add benefits. |
| Here I added Ashely’s salary. |
| Now we have Alexa and Ashely on the budget, but we still need to add their benefits. Let’s add a line item and walk through that. |
| I’ll change my item type to Benefit Type and now you’ll see some new options. First, I can select the Benefit type from this drop down. Let’s add medical benefits. Then I’ll add a dollar amount. Let’s say there are $5,000 of medical benefits covered by this grant. Of course I need to select a responsible individual before hitting save. |
| Now you can see on our budget we have line items under Personnel from Alexa and Ashley and then also for Medical Benefits. Those fringe benefits could be for Grace and/or Ben or others. |
| Another option when adding benefits this way is to add another budget category specifically for benefits. You would do that by hitting the plus next to expense budget, then you could put your benefit line items under that category. If you don’t need to track benefits to specific staff members for your grant, using the option to add benefits by benefit type may be useful for your organization. |
| Through this video you’ve learned how to create personnel categories and line items on a grant budget. Should you have any additional questions, please visit our support site. Thank you! |