New Grad/Professional Student
Budget-level Account Codes

GMUN Meeting
September 23, 2010
New Grad/Professional Student
Budget-level Account Codes

• What are the new Budget-level Account codes?
  – 700310  Salaries-Grd/Pr No Tuit- FinBdg
  – 710310  Fringe-Grad/Pr No Tuitn- FinBdg

• Why were they added to the FY11 COA?
  – Account code 710301 needed to be treated differently from 710302 for F&A purposes under MTDC
  – Configured the F&A Tree in January 2009 to correctly charge F&A expense, but needed the new Budget-level codes to correct the budget calculation in Peoplesoft
New Grad/Professional Student Budget-level Account Codes

• Why did my summer RA fringe get charged F&A?
  – In May, the mapping of the following job codes were corrected in the HR system:
    • 9535 Professional Program Assistant
    • 9539 Legal Project Assistant (w/o Tuition Benefit)
    • 9571 Summer Term Teaching Assistant (w/o Tuition Benefit)
    • 9572 Summer Term Research Assistant (w/o Tuition Benefit)
    • 9573 Summer Term Administrative Fellow (w/o Tuition Benefit)
    • 9575 Summer Session Teaching Assistant (w/o Tuition Benefit)
  – The fringe benefits for these job codes previously mapped to Account 710301, which is exempt from F&A under MTDC
  – After the re-mapping in the HR system, the fringe benefits for these job codes map to 710302 which accrues F&A charges under MTDC
New Grad/Professional Student
Budget-level Account Codes

• How does this impact my combo codes?
  – Prior to FY2011:
    • Account codes 700301 and 700302 rolled up to budget level account
code 700300, and 710301 and 710302 rolled up to budget level account
code 710300.
    • If 700300 were set up on a sponsored project, combo codes were
generated that included both 700301 and 700302; if 710300 were set up
on a sponsored project, combo codes were generated that included both
710301 and 710302.
  – Starting in FY2011:
    • 700302 now rolls up to budget level account code 700310
    • 710302 now rolls up to budget level account code 710310.
    • If 700300 or 710300 were previously set up on a sponsored project, the
combo codes that include 700301 and 710301 will remain active in the
HR system.
    • However, unless the new budget level account codes 700310/710310
have been set up on a sponsored project, the combo codes that
previously existed that included 700302/710302 have become inactive.
New Grad/Professional Student Budget-level Account Codes

• What has been done to accommodate this change in the COA?
  – SPA set up the new budget level account codes on any Project where there were current or future distributions set up in the HR system through mid-August that would require these budget lines (approximately 1,500 projects)
  – Going forward, if it is determined that these new budget lines (and related combo codes) are needed, the Department Research Administrator will need to make a budget request to their SPA Grant Administrator as they would for any other missing budget line
  – On new Awards/Projects, Grant Administrators will be setting these new codes up by default if 700300/710300 are requested
  – On August 18th, EGMS was updated to correctly calculate F&A on the fringe benefits related to the six job codes that were re-mapped by HR
New Grad/Professional Student Budget-level Account Codes

• How do I review the F&A calculation for GA fringe in EGMS?
  – Log into EGMS at http://egms.umn.edu/egms/. Select Proposal Form Preparation and enter your x.500 and password.
  – Search for your proposal using your EGMS proposal ID
  – Select the Budget Information tab
  – Select the University Personnel subsection
  – You will be brought to a list of Personnel Currently Listed on the budget
  – Click on the View Calculations button in the lower right hand corner of this section to see the detailed Personnel Cost Calculations, including fringe benefits.