

PROPOSALS CREATED AFTER THE 10.5 UPGRADE

Proposals created from scratch after the 10.5 upgrade

- Budgeting by person calendar months is now available, and is the default. To budget by summer and academic months, answer "yes" to the "Budget summer and academic effort separately" question on the Edit Personnel Cost screen.
- 12 months has to be selected as the Appointment in order for the # of months to appear correctly on the pending section of the c+p.
- Enter the person's monthly salary times 12 in the Annualized Salary box. For NIH proposals where the researcher is at or over the NIH salary cap, enter the NIH salary cap.
- If you prefer to budget by %, select "Effort Metric" of Percentage on the Budget Period + Key Dates page. % is a percentage of the months in the budget period, not the number of months in the appointment.

What if a proposal created before the upgrade is copied or has a renewal, revision, or resubmission after the upgrade?

- The copy, renewal, revision, or resubmission proposal will default to budgeting by %, but you can change the "Effort Metric" to Months on the Budget Period + Key Dates page. Follow the instructions in the "how to correct wrong display values for proposals created before the upgrade" column section of this quick guide (next column).

What if you want to budget an amount but don't know the months or percentage?

- Divide the cost by the person's monthly salary and enter the result as person months in the budget.

s2s submissions

- The Annualized Salary maps to the Base Salary field on the SF424. Manually change the Base Salary on the SF424 budget to reflect the person's actual base salary as needed, except for NIH submissions where the researcher is at or over the NIH salary cap.
- Sal Req months maps to calendar months, SM Sal Req maps to summer months, and AY Sal Req maps to academic months.
- If you prefer to budget by %, the % Sal Req times the number of budget period months maps to the calendar months on the SF424.

PROPOSALS CREATED BEFORE THE 10.5 UPGRADE

Editing and viewing proposals after the upgrade that were created before the upgrade

- If the FP used a 9-month salary and a percentage based on number of months in the appointment (not based on number of months in the budget period):
 - These values will be wrong:
 - The 9-month salary will display as "Annualized Salary"
 - The monthly salary will display as the 9-month salary/12
 - The person months will display as 0 or the wrong value
 - These values will be correct:
 - Salary cost
 - # of person months on the pending section of the c+p

How to correct wrong display values for proposals created before the upgrade

- Draft, "Department Review: Response Pending from PI", "Specialist Review: Pending Changes by PI" states, or recall "Department Review" or "Specialist Review":
 - Change the Effort Metric on the Budget Periods + Key Dates page to Months.
 - On the Edit Personnel page, Q3, change Appointment to 12 months. For Q4, answer yes to budget summer and academic months separately; answer no to budget by calendar months. Q5. Update Annualized Salary to monthly amount x 12.
 - On the Personnel Costs page, the cost will now also be incorrect. Keep going. Press Edit, then update the Person Months. Press save and the cost will update. % will update to be # PM budgeted/number months in Budget Period.
- "Pending Sponsor Review" or "Pending Sponsor Review Award Anticipated": Update the budget during JIT using above instructions.
- Awarded, Not Funded, Not Submitted: These are terminal states and cannot be updated.

Proposals created before the upgrade that will display correctly after the upgrade

- NIH proposals where the researcher was budgeted with the NIH salary cap.
- Any non-12-month budget periods that used the Feb 2022 effort tool with 12-month salaries and % as a percentage of number of budget period months should display all values properly.

Huron Term	Definition After the 10.5 Upgrade
Effort Metric	<ul style="list-style-type: none"> Question on Budget Period and Key Dates page to specify budgeting by person months or by percentage. Regardless of which metric is used, Huron displays both person months (PM) and percentage (%)
Duration	<ul style="list-style-type: none"> Length of budget period AKA the number of months in the budget period Huron calculates this value based off the Budget Period Start and End Dates on the Budget Period and Key Dates (BPKD) SmartForm page Huron displays duration as 2 places past the decimal, but many places past the decimal are used in the Huron salary cost calculation. Most of our proposals have 12-month budget periods. Therefore, most budget period durations are 12.00 months. ~10% of our proposals have non-12-month budget periods. Their budget period durations would be more or less than 12.00 months.
% Sal Req	<ul style="list-style-type: none"> If Effort Metric is percentage, enter this value If Effort Metric is PM, Huron calculates and displays % Sal Req %Sal Req = PM / Duration Note: The calculation is PM divided by duration, not number of months in the appointment Example: You want to budget 1 month. Budget Period Duration is 12 months. $1/12 = 8.33\%$ Sal Req Example: You want to budget 1 month. Budget Period Duration is 3 months. $1/3 = 33.33\%$ Sal Req Example: You want to budget 1 month. Budget Period Duration is 18 months. $1/18 = 5.55\%$ Sal Req
Person Months	<ul style="list-style-type: none"> If Effort Metric is PM, enter this value If Effort Metric is percentage, Huron calculates and displays PM PM = % Sal Req x Duration Note: The calculation is % Sal Req times duration, not number of months in the appointment Example % Sal Req = 8.33%. Budget Period Duration is 12 months. $8.33\% \times 12 = 1$ PM Example % Sal Req = 33.33%. Budget Period Duration is 3 months. $33.33\% \times 3 = 1$ PM Example % Sal Req = 5.55%. Budget Period Duration is 18 months. $5.55\% \times 18 = 1$ PM

Annualized Salary	<ul style="list-style-type: none"> User enters this value Annualized Salary = Monthly salary x 12 Person has 9-month appt type? Take their 9-month salary and divide it by 9 to get the monthly salary. Then multiply the monthly salary by 12 to return the annualized salary. Example: Person's 9-month salary is \$90K. $\\$90K/9 = \\$10K$. $\\$10K \times 12 = \\$120K$ Annualized Salary
Monthly Rate	<ul style="list-style-type: none"> Huron calculates and displays this value Monthly Rate = Annualized Salary / 12 Example: Annualized Salary is \$120K. $\\$120K/12 = \\$10K$ Monthly Salary

If Effort Metric is Person Months (PM)	<p>Salary Cost = (PM/Duration) x Annualized Salary x (Duration/12) Note: the 12 is the constant in this calculation. Duration/12 is the ratio of the number of months in the budget period divided by 12. Why is the ratio part of this calculation? If you needed to budget a person for all 18-months of an 18-month budget period: (PM/Duration) x Annualized Salary x (Duration/12) $(18/18) \times \\$120K \times (18/12) = \\$180K$</p> <p>Huron does not allow more than the # of months in the duration to be entered in the PM field.</p> <p>Breaking down this calculation: Salary Cost = (PM/Duration) x Annualized Salary x (Duration/12) Salary Cost = (PM/Duration)x(Monthly Salary x 12) x (Duration/12) Salary Cost = PM x Monthly Salary</p>
If the Effort Metric is percentage	<p>Salary Cost = %Sal Req x Annualized Salary x (Duration/12) Huron does not allow more than 100% to be entered as a percentage.</p> <p>Breaking down this calculation: Salary Cost = %Sal Req x Annualized Salary x (Duration/12) Salary Cost = (PM/Duration) x (Monthly Salary x 12) x (Duration/12) Salary Cost = PM x Monthly Salary</p>