Overview:

The Kuali Coeus **Single Point Entry** (SPE) Budget is a quick budget feature that provides an alternative method for entering budget data and is accessible, as an option, once a detailed budget is being set-up in KC. The SPE interface is modeled after the Coeus Premium detailed budget entry screen. Users can choose all cost elements from a single **Object Code** drop-down (or search window) and enter all required information in single screen.

📌 **Note**: **Single Point Entry** budget **cannot** be used when submitting the proposal **System-2-System** (S2S) to Grants.gov and a detailed budget is required. In this case, you will need to budget for your personnel via the **Personnel Costs** section of the budget.
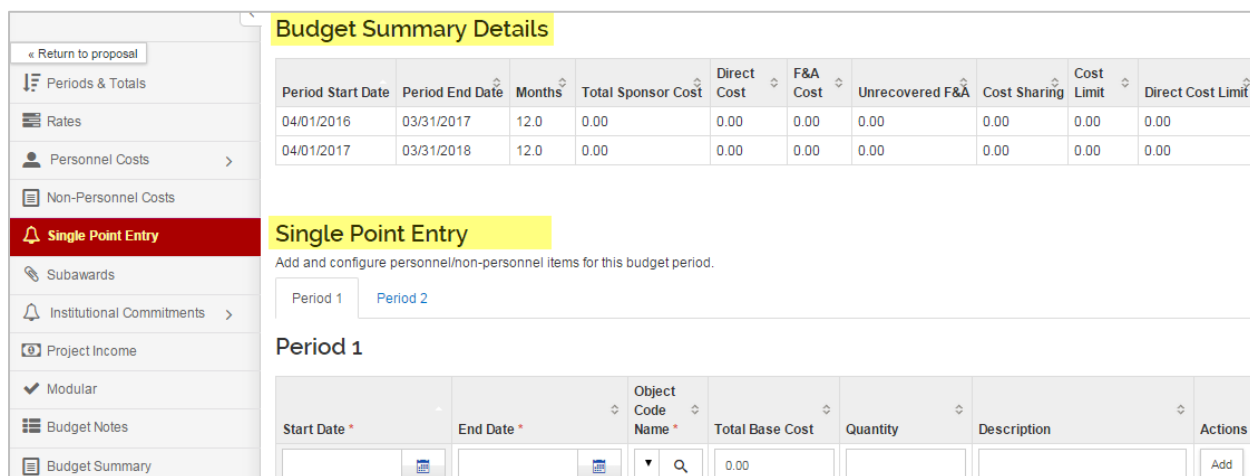
The cost entered in the **Personnel Costs** and **Non-Personnel Costs** sections of the detailed budget, will automatically populate the **SPE** screen. The items added in the **SPE** screen will automatically populate the Non-Personnel detail for both Personnel and Non Personnel cost element types. **This means that some Personnel data is not captured within the SPE**.

Procedure:

Entering Budget via Single Point Entry (Only)

After creating/accessing the proposal, complete the following steps to enter the proposal budget via the Single Point Entry feature.

1. While in the Proposal, click on the **Budget** panel, located on the left hand navigation, and **add** a new detailed budget version.

2. In the **Budget**, verify your budget settings (rates, periods, etc.) and make modifications as needed.

3. Click on the **Single Point Entry** panel to display the **Single Point Entry** screen.

Figure 1 – Single Point Entry

The **Single Point Entry** screen includes __two__ sections:

(1) __Budget Summary Details__ – view only section that displays the Project Period(s) and Total Costs per Project Period (Total, Direct, F&A, Cost Sharing, and Unrecovered F&A). This section automatically updates as Cost Elements are added to the budget.

(2) __Single Point Entry__ – entry section where **Personnel** and **Non-Personnel** cost items are added for each budget period. It is organized by project periods which are displayed as tabs across the screen.

4. To add costs to your Single Point Entry budget, in the **Single Point Entry** section → **Period** tab:

   a. Select/enter **Start Date** and **End Date** applicable to this cost element.
      i. This can be the start and end date of that particular project period, or it can be any start and end date that falls within that Project Period Start and End Dates
      ii. For Personnel Costs, you can specify the dates they will contribute effort to this project

   b. From the **Object Code Name** drop-down select the **Cost Element** you want to add (or you can search for it via the lookup function).

   c. Enter the **cost** in the **Total Base Cost** field.

   d. If desired, enter the **Quantity** and **Description** in the corresponding fields.

   e. Click the **Add** button.

Figure 2 – Adding Cost Element to SPE

5. The Cost Element is added as a line and a **Details** and **Delete** (🗑) buttons become available in the **Actions** column.

Figure 3 – Added Cost Element with Details and Delete Options

Clicking the **Details** button for each Cost Element added, will display the **Edit Assigned Cost Element** window with tabs (**Details**, **Cost Sharing**, and **Rates**) displayed at the top. The displayed information can be edited in this window.

Details Tab:

Figure 4 – Edit Assigned Cost Element Window

Field Name	Description

Field Name	Description
Start Date	If appropriate, modify the **Start Date** if it is not the same as the budget period start. Enter the appropriate date or use the calendar tool to select a date.
End Date	If appropriate, modify the **End Date** if it is not the same as the budget period end. Enter the appropriate date or use the calendar tool to select a date.
Category	If applicable, change the category from the default for this cost element.
Object Code Name	If applicable, change the object code/cost element.
Total Base Cost	If applicable, change the total amount for the item entered being charged to the sponsor.
Quantity	(Optional) If applicable, click in the field to add or change the number.
Description	If applicable, change the description entered.
Inflation Rates	The system displays the Inflation rate being applied to the Cost Element. Verify that this information is correct.
Apply Inflation	If eligible, **check**/**uncheck** the **Apply Inflation** checkbox for the particular cost element. The default setting is 'checked' so inflation applies.
Submit Cost Sharing	**Uncheck** the **Submit Cost Sharing** so this line item's cost share expense won't appear on S2S forms. (This does **not** eliminate the need to track cost sharing commitments.)
On Campus	Defaults to the centrally maintained status for this cost element. **Check** or **Uncheck** the box to change the status. Unchecking this checkbox will apply the '**off**' campus rate for this cost element.

Table 1 – Edit Assigned Non-Personnel → Details Tab

Cost Sharing Tab:

Note: If a Cost Element is being cost shared, use this **Cost Sharing** tab/field, to enter the amount that is being cost shared.
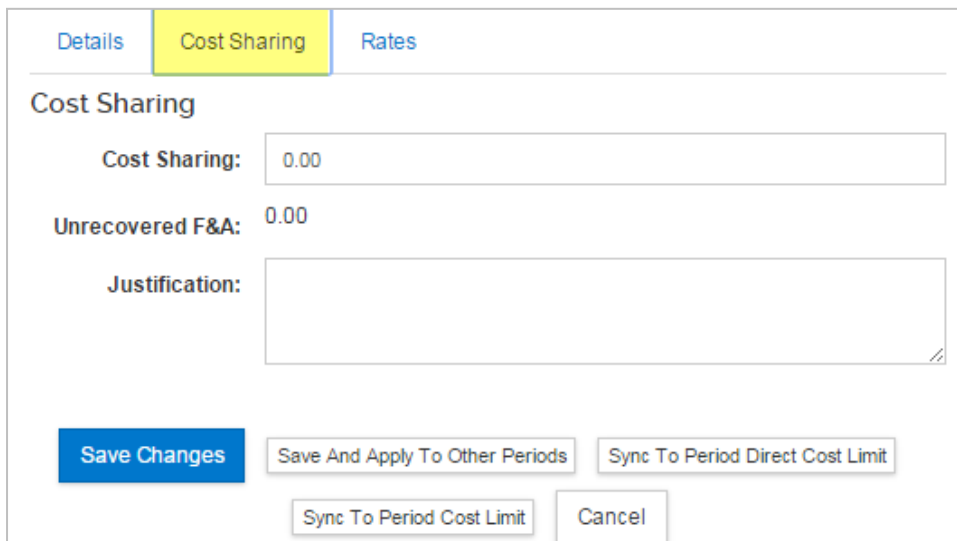

Figure 5 – Edit Assigned Non-Personnel → Cost Sharing Tab

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 field 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.

Figure 6 - Edit Assigned Non-Personnel → Rates Tab

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:

Figure 7 – Additional Line Items Functions

Save Changes: Click this button to save and apply changes made to the cost element.

Save and Apply to Other Periods: Click this button to generate this expense line to one or more future budget periods, **after** the budget periods have been generated. This feature allows you to add or alter a line item to one budget period in an already generated budget, and have the system populate the remaining budget periods with the expense line.

Sync to Period Cost Limit: Click this button to recalculate the budget using this line item expense to goal-seek the value to meet the 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 recalculate the budget using this line item expense to goal-seek the value to meet the 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.

Cancel: Click to close the window without making changes. You can also use the 'x' in the upper right corner of the window.

6. To close out of the **Edit Assigned Cost Element** window, click the **Save Changes** button if you made changes or the **Cancel** button if you did not make any modifications.

7. **Repeat** these steps to continue adding all the applicable Cost Elements in the first budget period.

Note: The process of adding **Personnel** and **Non-Personnel** costs in the Single Point Entry budget interface is the **same**. When including Personnel Cost Elements, the applicable Employee Benefits will be automatically calculated by KC and reflected in the budget Direct Costs.

8. When you are finished with entering Period 1 costs, click the **Autocalculate Periods** link located in the budget **Toolbar**, to auto-generate the costs in the remaining budget periods (based on period 1 costs).
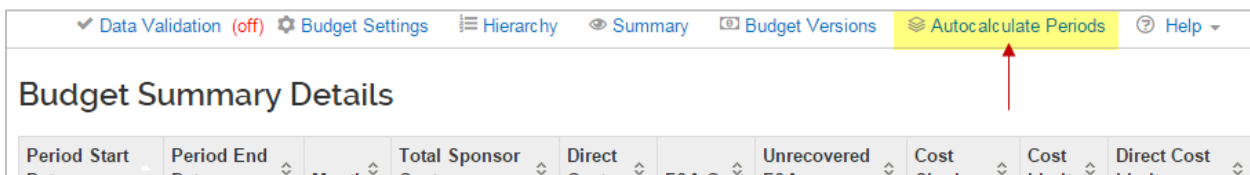

Figure 8 – Autocalculate Periods

The remaining **Budget Periods** will be updated with the costs entered in Year 1 of your budget.

Note: Make sure you have completed all required information for Period 1. The **Autocalculate Periods** functionality only works once per budget version.

Once the periods have been generated, you may return to each budget section to review and make adjustments to individual Cost Elements.

📌**Note**: When the budget includes **Subaward** costs, you can either enter the Subcontractors Cost Elements manually to your Single Point Entry, or you can use the **Subawards** section of the Budget, to either:

(1) Upload the Subaward Budget Form; or
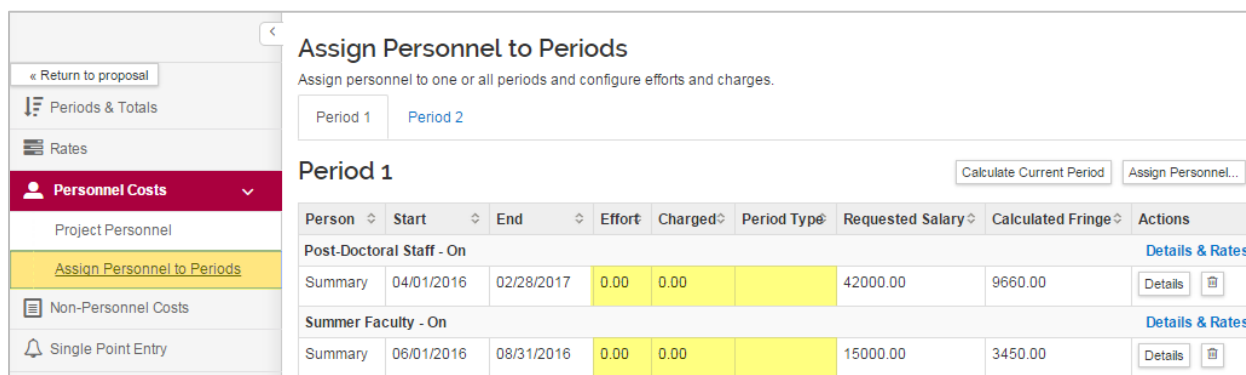(2) Enter Subaward Direct & F&A Costs per Project Period.

If using the **Subawards** section, KC will automatically add the applicable Cost Elements to your Single Point Entry budget.

Viewing the Single Point Entry Budget

As mentioned, the items added in the **Single Point Entry** screen will automatically populate the appropriate **Personnel Costs** or **Non-Personnel Costs** sections (depending on the category of the cost element added) and vice versa; the cost entered in the **Personnel Costs** and **Non-Personnel Costs** sections of the detailed budget, will automatically populate the **Single Point Entry** screen.

1. To view the budget you entered in **Single Point Entry** interface, in the **Personnel** and **Non-Personnel Costs** sections, navigate to each of these sections and the applicable cost elements will be displayed.

📌**Note**: When viewing Personnel costs, that were added via Single Point Entry interface, in the **Personnel Costs → Assign Personnel to Periods** section, you will notice that the **Effort**, **Charged**, and **Period Types** fields are blank and **no person** is assigned to the Cost Element. **Summary** entries do not allow for Effort, Charged and Period Types to be entered/selected.

Figure 9 – Assign Personnel to Periods View of Personnel Cost Elements Added via SPE

2. To view the budget you entered in the **Personnel** and **Non-Personnel Costs** sections, in the **Single Point Entry** interface, navigate to the **Single Point Entry** section and your budget information will be displayed.

Figure 10 – SPE View of Costs Added via Personnel (Assign Personnel to Periods) and Non-Personnel Costs Sections

Note: Personnel Cost Elements (Non-Summary) created via the Standard UI, i.e. the 'Assign Personnel to Periods' function, **cannot** be modified within the SPE interface.

Note: Summary Personnel Cost Elements can be created and modified in either the SPE or Standard UI. A separate 'Description' field is only available (for data entry) in the SPE interface.

Getting Help:

For questions or problems using Kuali Coeus, email the RAS Support Team at ra-help@mit.edu.

Include your **Name**, **Contact Information**, and the **questions** you have and or **difficulties** you are experiencing.