

## Overview

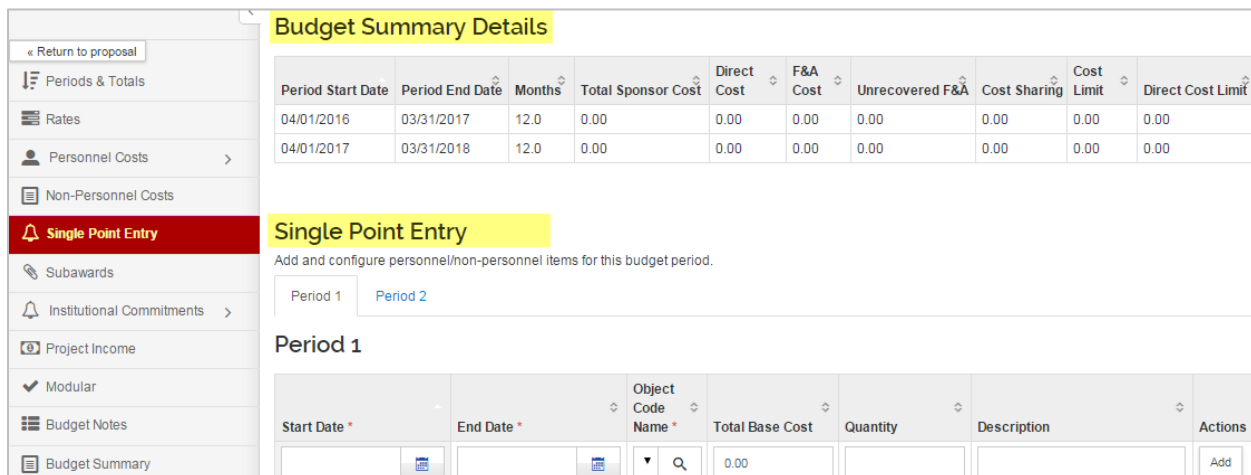
The Kuali Coeus **Single Point Entry (SPE)** Budget is a quick budget feature that provides an alternative method for entering budget data and is accessible, as an option, once a detailed budget is being set-up in KC. Users can choose all cost elements from a single **Object Code** drop-down (or search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

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

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.



Period Start Date	Period End Date	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
04/01/2016	03/31/2017	12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00
04/01/2017	03/31/2018	12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Start Date *	End Date *	Object Code Name *	Total Base Cost	Quantity	Description	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

**Figure 1 – Single Point Entry**

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

- (1) **Budget Summary Details** – a 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** – an 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.

Single Point Entry  
Add and configure personnel/non-personnel items for this budget period.

Period 1    Period 2

Period 1

Start Date *	End Date *	Object Code Name *	Total Base Cost	Quantity	Description	Actions
04/01/2016	03/31/2017	420226 - Materials and Services	15000		Supplies	Add

**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.

Period 1    Period 2

Period 1

Start Date *	End Date *	Object Code Name *	Total Base Cost	Quantity	Description	Actions
		select	0.00			Add
04/01/2016	03/31/2017	42022	15000.00		Supplies	Details Delete

**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:

✕
Edit Assigned Cost Element

Details
Cost Sharing
Rates

**Details**

**Start Date: \***  📅

**End Date: \***  📅

**Category:**  ▼ 🔍

**Object Code Name: \***  ▼ 🔍

**Total Base Cost:**

**Quantity:**

**Description:**

**Inflation Rates**

Description	Start Date	Institution Rate	Applicable Rate
Materials and Services	07/01/2015	3.00	3.00
Materials and Services	07/01/2016	3.00	3.00

**Apply Inflation:**

**Submit cost sharing:**

**On Campus:**

Save Changes
Save And Apply To Other Periods
Sync To Period Direct Cost Limit

Sync To Period Cost Limit
Cancel

**Figure 4 – Edit Assigned Cost Element Window**

Field Name	Description
<b>Start Date</b>	If appropriate, modify the <b>Start Date</b> if it is not the same as the budget period start. Enter the appropriate date or use the calendar tool to select a date.
<b>End Date</b>	If appropriate, modify the <b>End Date</b> if it is not the same as the budget period end. Enter the appropriate date or use the calendar tool to select a date.

Field Name	Description
<b>Category</b>	If applicable, change the category from the default for this cost element.
<b>Object Code Name</b>	If applicable, change the object code/cost element.
<b>Total Base Cost</b>	If applicable, change the total amount for the item entered being charged to the sponsor.
<b>Quantity</b>	(Optional) If applicable, click in the field to add or change the number.
<b>Description</b>	If applicable, change the description entered.
<b>Inflation Rates</b>	The system displays the Inflation rate being applied to the Cost Element. Verify that this information is correct.
<b>Apply Inflation</b>	If eligible, <b>check/uncheck</b> the <b>Apply Inflation</b> checkbox for the particular cost element. The default setting is 'checked' so inflation applies.
<b>On Campus</b>	Defaults to the centrally maintained status for this cost element. <b>Check</b> or <b>Uncheck</b> 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.

The screenshot shows a web-based form with three tabs: 'Details', 'Cost Sharing' (highlighted), and 'Rates'. Under the 'Cost Sharing' tab, there are three main sections:
 

- Cost Sharing:** A text input field containing '0.00'.
- Unrecovered F&A:** A text input field containing '0.00'.
- Justification:** A larger text area for entering details.

 At the bottom of the form, there are five buttons:
 

- Save Changes:** A prominent blue button.
- Save And Apply To Other Periods:** A light gray button.
- Sync To Period Direct Cost Limit:** A light gray button.
- Sync To Period Cost Limit:** A light gray button.
- Cancel:** A light gray button.

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

Field Name	Description
<b>Cost Sharing</b>	If appropriate, enter the contributed amount designated as cost shared.
<b>Unrecovered F&amp;A</b>	(Display only). Will populate with the calculated under-recovery, if any.
<b>Justification Notes</b>	(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.

**Edit Assigned Cost Element**

Details Cost Sharing **Rates**

**Rates**

Class	Type	Rate Cost	Rate Cost Sharing	Apply Rate??
Employee Benefits	EB on LA	0.00	0.00	<input checked="" type="checkbox"/>
MTDC	MTDC	8400.00	0.00	<input checked="" type="checkbox"/>
Vacation	Vacation on LA	0.00	0.00	<input checked="" type="checkbox"/>

Save Changes Save And Apply To Other Periods Sync To Period Direct Cost Limit  
Sync To Period Cost Limit Cancel

**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:

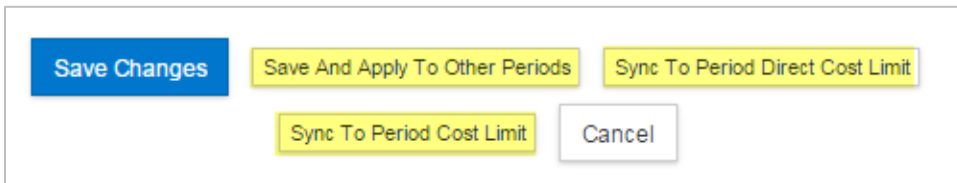


Figure 7 – Additional Line Items Functions

**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 Periods and Totals screen 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 Periods and Totals screen 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).

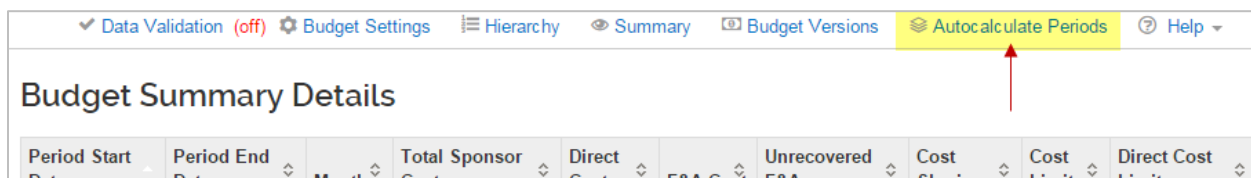


Figure 8 – Autocalculate Periods

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 adjust 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 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.

The screenshot shows the 'Assign Personnel to Periods' interface. The left sidebar has a menu with 'Personnel Costs' selected. The main area shows 'Period 1' with a table of personnel cost elements. The table has columns for Person, Start, End, Effort, Charged, Period Type, Requested Salary, Calculated Fringe, and Actions. There are two summary rows: 'Post-Doctoral Staff - On' and 'Summer Faculty - On'. Both have Effort and Charged values of 0.00, Requested Salary of 42000.00 and 15000.00 respectively, and Calculated Fringe of 9660.00 and 3450.00 respectively.

Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe	Actions
<b>Post-Doctoral Staff - On</b>								
Summary	04/01/2016	02/28/2017	0.00	0.00		42000.00	9660.00	Details & Rates
<b>Summer Faculty - On</b>								
Summary	06/01/2016	08/31/2016	0.00	0.00		15000.00	3450.00	Details & Rates

**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.

### Budget Summary Details

Period Start Date	Period End Date	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
04/01/2016	03/31/2017	12.0	55388.19	35505.25	19882.94	0.00	0.00	0.00	0.00
04/01/2017	03/31/2018	12.0	57049.84	36570.41	20479.43	0.00	0.00	0.00	0.00

### Single Point Entry

Add and configure personnel/non-personnel items for this budget period.

Period 1    Period 2

#### Period 1

Start Date *	End Date *	Object Code Name *	Total Base Cost	Quantity	Description	Actions
		select	0.00			Add
04/01/2016	03/31/2017	420226 - Mate	5000.00			Details
04/01/2016	03/31/2017	420050 - Trav	2000.00			Details
06/01/2016	08/31/2016	400005 - Summer Faculty - On	23175.00	0		

Personnel added to the Budget via Assign Personnel to Periods section are not editable in the SPE interface

**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 user interface, 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 user interface. A separate 'Description' field is only available (for data entry) in the SPE interface.

## Related Documentation

[Budgeting for Personnel Using Groups](#)

## Getting Help

For questions regarding Kualii Coeus Quick Reference Cards, email the Support Team at [ra-help@mit.edu](mailto:ra-help@mit.edu).