

## Overview:

Kuali Coeus (KC) Budget has been pre-loaded with a variety of **To Be Named** (TBN) positions, such as Research Assistants, Administrative/Clerical, PostDocs, etc. for users to be able to budget for them when named participants are not known.

**Note:** The words/abbreviations 'To Be Named', 'TBN', and 'TBA' are used interchangeably in this Quick Reference Card and refer to the same thing.

Additionally, TBN positions for **TBA – Post-Docs**, **TBA – Research Assistant – MS**, and **TBA-Research Assistant – PhD** have also been pre-loaded to the **Employee** search option to allow for **Base Salary** and **Appointment Type** information for these TBAs to automatically populate based upon the current Institute rate. This pre-populated Base Salary and Appointment Type may still be edited/overwritten in the budget to meet individual DLC rates for these categories.

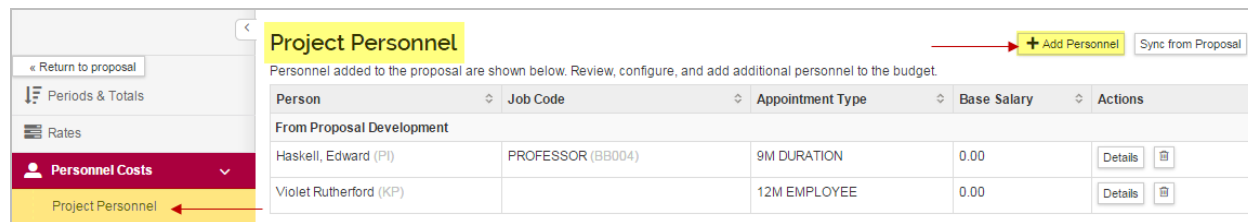
With that said, there are **two** ways to add TBNs to your budget; via:

1. **Employee Search** (only for **TBA, Post-Docs, TBA, Research Assistant – MS**, and **TBA, Research Assistant – PhD**; automatically populates the Base Salary and Appointment Type fields with pre-defined information)
2. **To Be Named Search** (for **all** TBNs – including the ones available in the Employee Search; all Salary and Appointment Type information must be manually updated in the budget)

## Procedure:

### Adding TBAs via Employee Search

1. While in the Budget, click the **Personnel Cost** → **Project Personnel** in the navigation panel. The **Project Personnel** screen will open.



Person	Job Code	Appointment Type	Base Salary	Actions
From Proposal Development				
Haskell, Edward (PI)	PROFESSOR (BB004)	9M DURATION	0.00	Details
Violet Rutherford (KP)		12M EMPLOYEE	0.00	Details

Figure 1 – Project Personnel Subpanel

2. While in the **Project Personnel** subpanel, click the **Add Personnel** button.

The **Add Personnel** window will open.

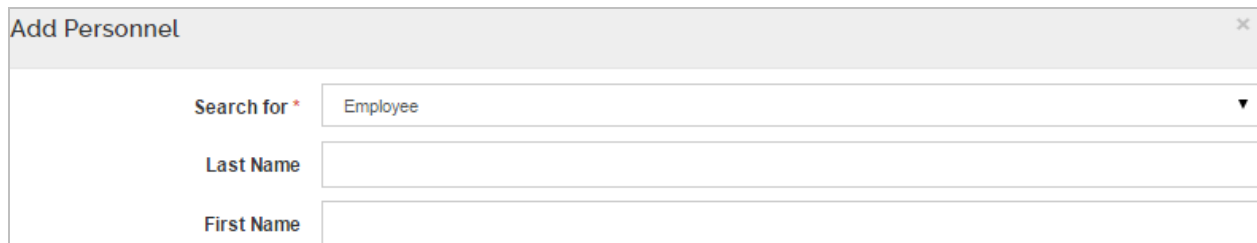
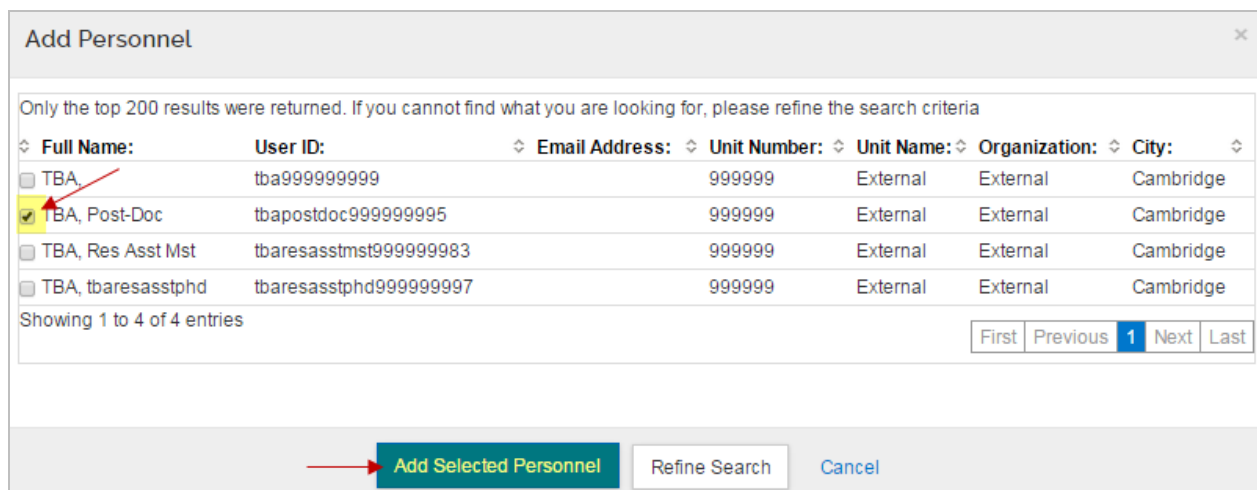


Figure 2 – Adding TBA

3. In the **Add Personnel** window:
  - a. From the **Search for** drop-down field, select/leave **Employee**
  - b. In the **Last Name** field enter **TBA**
  - c. Click the **Search** button
4. A list of all the available TBAs will display. Select the TBA you want to add by clicking the **checkbox** next to the TBA's Full Name and click the **Add Selected Personnel** button.



Full Name:	User ID:	Email Address:	Unit Number:	Unit Name:	Organization:	City:
<input type="checkbox"/> TBA,	tba999999999		999999	External	External	Cambridge
<input checked="" type="checkbox"/> TBA, Post-Doc	tbapostdoc999999995		999999	External	External	Cambridge
<input type="checkbox"/> TBA, Res Asst Mst	tbareasasstmst999999983		999999	External	External	Cambridge
<input type="checkbox"/> TBA, tbareasasstphd	tbareasasstphd999999997		999999	External	External	Cambridge

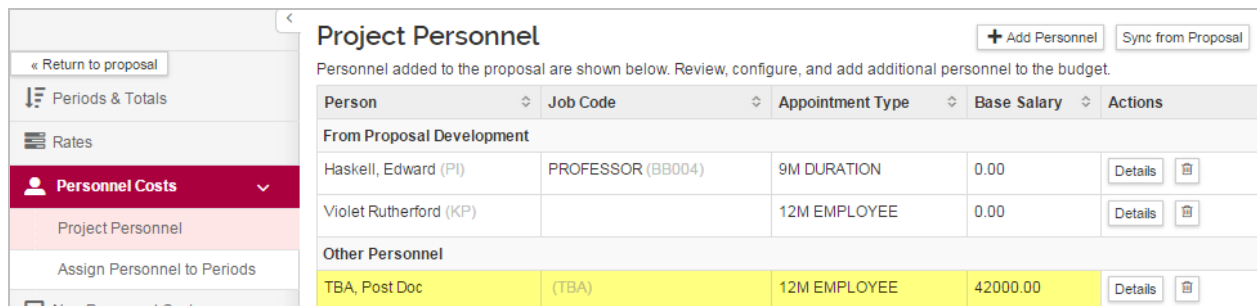
Showing 1 to 4 of 4 entries

Buttons: First, Previous, 1, Next, Last

Buttons: Add Selected Personnel, Refine Search, Cancel


Figure 3 – Adding TBA

5. The selected TBA(s) will be added to the **Project Personnel** section where you will need to update the details for each of them, if applicable.



Person	Job Code	Appointment Type	Base Salary	Actions
<b>From Proposal Development</b>				
Haskell, Edward (PI)	PROFESSOR (BB004)	9M DURATION	0.00	Details [trash]
Violet Rutherford (KP)		12M EMPLOYEE	0.00	Details [trash]
<b>Other Personnel</b>				
TBA, Post Doc	(TBA)	12M EMPLOYEE	42000.00	Details [trash]


Figure 4 – Added TBA

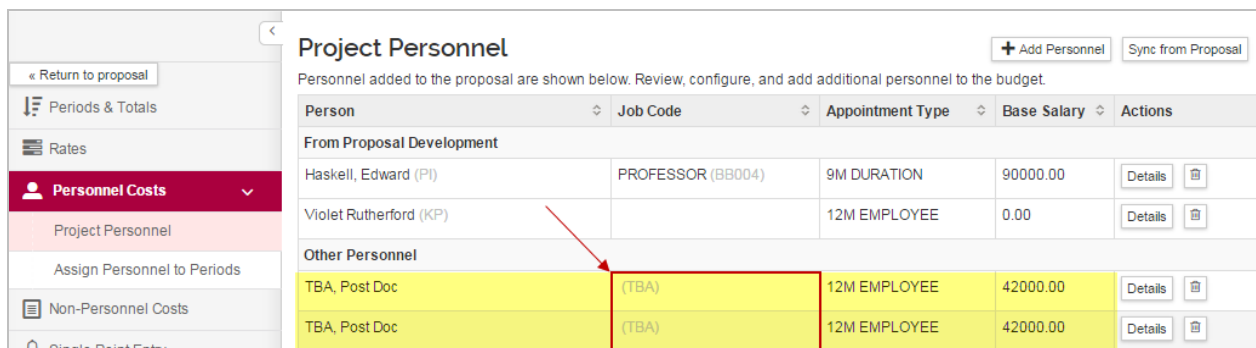
 **Note:** **Base Salary** and **Appointment Type** automatically populates based upon current Institute rate (Yearly Salary Amount with 12M Employee Appointment Type) for:

- TBA, Research Assistant - MS
- TBA, Research Assistant - PhD
- TBA, Post-Doc

This Base Salary and Appointment Type may be edited in the budget (individual Details section) to meet individual DLC rates for these categories.

6. If needed, repeat these steps to add more TBAs via the Employee search option.

 **Note:** If adding multiple TBAs of the **same type** via the Employee search, KC will behave as if all those TBAs are the same person. In order to distinguish the TBAs and prevent system errors when budgeting for them, you will need to change the Job Code of the TBA(s) so no two TBAs have the same Job Code.








Person	Job Code	Appointment Type	Base Salary	Actions
<b>From Proposal Development</b>				
Haskell, Edward (PI)	PROFESSOR (BB004)	9M DURATION	90000.00	Details 
Violet Rutherford (KP)		12M EMPLOYEE	0.00	Details 
<b>Other Personnel</b>				
TBA, Post Doc	(TBA)	12M EMPLOYEE	42000.00	Details 
TBA, Post Doc	(TBA)	12M EMPLOYEE	42000.00	Details 

Figure 5 – TBAs added via Employee Search (Same Job Code)

7. Click the **Details** button for any of the TBAs if any of their information needs to be modified (including Job Codes).

 **Note:** Keep in mind that the pre-populated Base Salary and Appointment Type may be edited/overwritten to meet individual DLC rates if those deviate from the current Institute rate, by clicking the **Details** button and overwriting the information presented for the each applicable TBA.

8. In the **Assign Personnel to Periods** subpanel, budget for the TBAs as you normally would for any other person.

## Adding TBAs via To Be Named Search

1. While in the Budget, click the **Personnel Cost** → **Project Personnel** in the navigation panel. The **Project Personnel** screen will open.

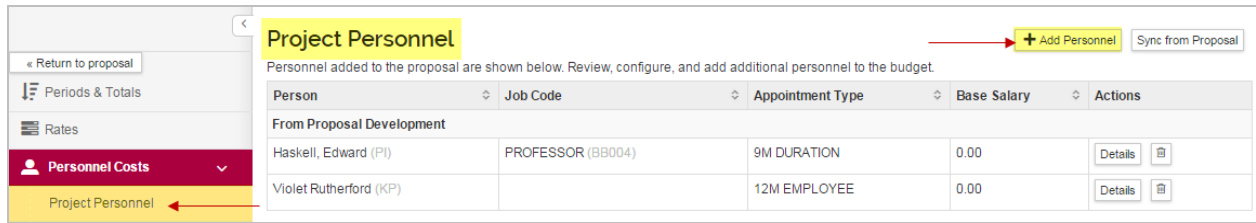


Figure 6 – Project Personnel Subpanel

- While in the **Project Personnel** subpanel, click the **Add Personnel** button.
- In the **Add Personnel** window that opens, from the **Search for** drop-down field, select **To Be Named**.

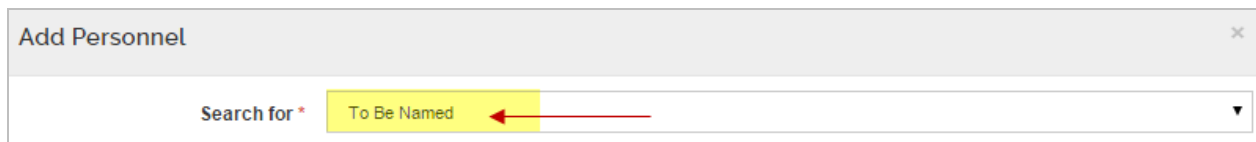


Figure 7 – Search for: To Be Names

- A list of all the available TBAs will display. Enter the number (e.g. 3) of TBAs in the **Quantity** field for each **Person Category** you want to add and click the **Add TBN Personnel to the Budget** button.

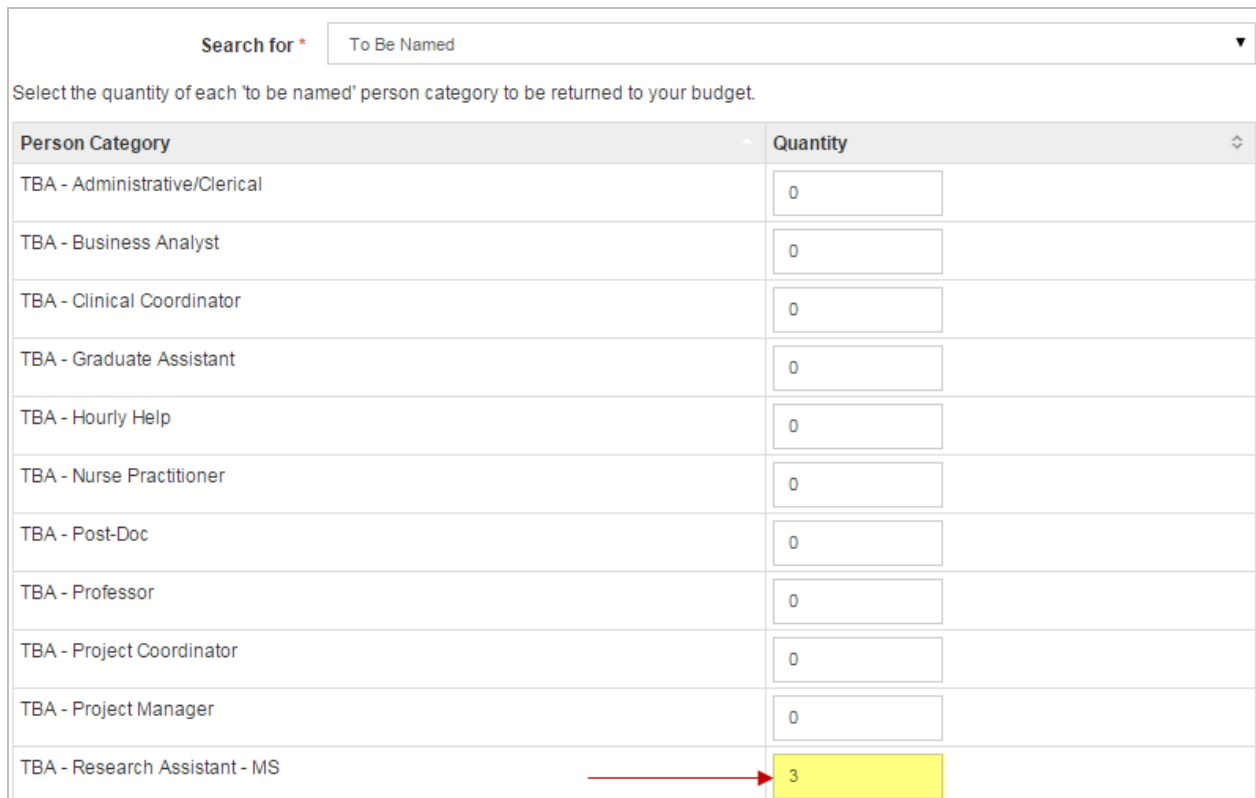
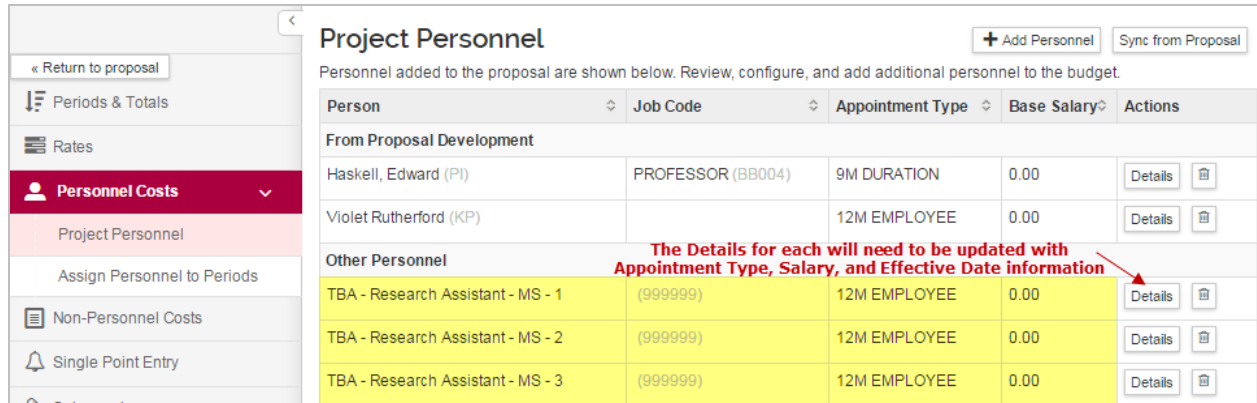


Figure 8 – List of TBN(s)

- The selected TBA(s) will be added to the **Project Personnel** section where you will need to update the details for each of them (Base Salary, Appointment Type, Base Salary Effective Date).



**Project Personnel** + Add Personnel Sync from Proposal

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

Person	Job Code	Appointment Type	Base Salary	Actions
<b>From Proposal Development</b>				
Haskell, Edward (PI)	PROFESSOR (BB004)	9M DURATION	0.00	Details
Violet Rutherford (KP)		12M EMPLOYEE	0.00	Details
<b>Other Personnel</b>				
<b>The Details for each will need to be updated with Appointment Type, Salary, and Effective Date information</b>				
TBA - Research Assistant - MS - 1	(999999)	12M EMPLOYEE	0.00	Details
TBA - Research Assistant - MS - 2	(999999)	12M EMPLOYEE	0.00	Details
TBA - Research Assistant - MS - 3	(999999)	12M EMPLOYEE	0.00	Details

Figure 9 – Added TBA(s)

- Click the **Details** button for each TBA to enter their **Base Salary, Appointment Type** and **Salary Effective Date** information.
- In the **Assign Personnel to Periods** subpanel, budget for the TBAs as you normally would for any other person.

## Getting Help

For questions or problems using Kuali Coeus Adding TBAs to Budget Quick Reference Card, email the Support Team at [kc-help@mit.edu](mailto:kc-help@mit.edu).

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