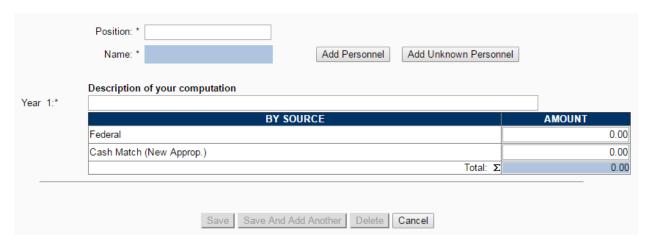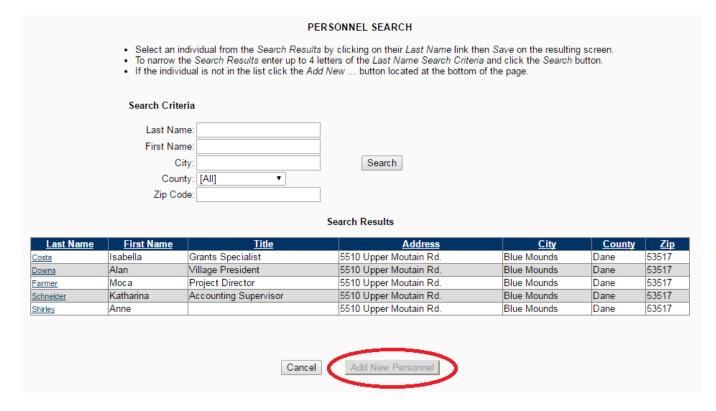# How to add Personnel and Employee Benefits using Contacts

Personnel Budget

- Many grants use contact based personnel line items in the grant budget. This means you can no longer just type a name in a text field. Personnel must be a verifiable individual with an email address. These individuals are referred to as "Grantee Personnel". The Name of this individual is completed by using the "Add Personnel" or "Add Unknown Personnel" buttons. You can still enter the Position description of the person directly.
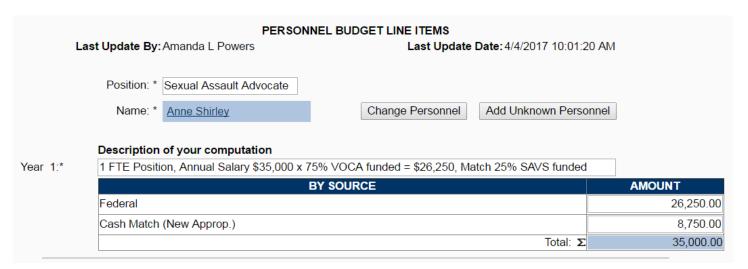
Position: *	[_____]	
Name: *	[_____]	Add Personnel Add Unknown Personnel

Description of your computation

Year 1:* [_____]

BY SOURCE	AMOUNT
Federal	0.00
Cash Match (New Approp.)	0.00
Total: Σ	0.00

Save   Save And Add Another   Delete   Cancel

- After clicking the "Add Personnel" button you may see a list of names for personnel in your agency. To add one of these individuals to your budget click on their last name. This list may not include the specific individual you wish to add. Note the "Add New Personnel" button is not enabled at this point. In order to add a new individual you must first perform an active search. Enter up to 4 characters of the name you wish to add and click search. If the individual is still not shown in the list you will now be able to click the "Add New Personnel" button.

PERSONNEL SEARCH

- Select an individual from the *Search Results* by clicking on their *Last Name* link then *Save* on the resulting screen.
- To narrow the *Search Results* enter up to 4 letters of the *Last Name Search Criteria* and click the *Search* button.
- If the individual is not in the list click the *Add New ...* button located at the bottom of the page.

Search Criteria

Last Name: [_____]
First Name: [_____]
City: [_____]   Search
County: [All] ▼
Zip Code: [_____]

Search Results

Last Name	First Name	Title	Address	City	County	Zip
Costa	Isabella	Grants Specialist	5510 Upper Moutain Rd.	Blue Mounds	Dane	53517
Downs	Alan	Village President	5510 Upper Moutain Rd.	Blue Mounds	Dane	53517
Farmer	Moca	Project Director	5510 Upper Moutain Rd.	Blue Mounds	Dane	53517
Schneider	Katharina	Accounting Supervisor	5510 Upper Moutain Rd.	Blue Mounds	Dane	53517
Shirley	Anne		5510 Upper Moutain Rd.	Blue Mounds	Dane	53517

Cancel   Add New Personnel

- When adding a new individual complete the First Name, Last Name, and Email address fields, then click the "Save" button. Other fields may also be completed but are not required.

INDIVIDUALS DETAILS

Save Delete Cancel

Courtesy Title: [ ] [...]

First Name: * Anne

Middle Initial/Name: [ ]

Last Name & Suffix: * Shirley [ ] [...]

Position Title: [ ] [...]

Preferred Contact Method: * Email ▼

Email Address: * test@test.com

Last Update By: Amanda L Powers
Last Update Date: 4/4/2017 9:59:59 AM

Add Phone Number

Telephone Number List

Location	Phone Number	Extension

Save Delete Cancel

- Complete the remaining budget fields and save.

PERSONNEL BUDGET LINE ITEMS

Last Update By: Amanda L Powers   Last Update Date: 4/4/2017 10:01:20 AM

Position: * Sexual Assault Advocate

Name: * Anne Shirley   Change Personnel   Add Unknown Personnel

Description of your computation

Year 1:* 1 FTE Position, Annual Salary $35,000 x 75% VOCA funded = $26,250, Match 25% SAVS funded

BY SOURCE	AMOUNT
Federal	26,250.00
Cash Match (New Approp.)	8,750.00
Total: Σ	35,000.00

- If the position to be included in the budget in vacant or the person's name is not known you can use the "Add Unknown Personnel" button. Then complete the Position text and the remaining budget fields. The name of the person will be listed as "{To Be Determined}". If there are multiple "To Be Determined" individuals make sure to distinguish them in the Position description as shown below.

PERSONNEL

Briefly describe the overall use of funds for this budget category:

Staff wages

[Add Budget Line Item Detail]

Position	Name	Cost	
		Year 1	Total
Accounting Supervisor	Katharina Schneider	31,211.00	31,211.00
Grants Specialist	Isabella Costa	13,725.00	13,725.00
Intake/CARE Specialist #1	{To Be Determined}	20,332.00	20,332.00
Intake/CARE Specialist #2	{To Be Determined}	12,100.00	12,100.00
Sexual Assault Advocate	Anne Shirley	35,000.00	35,000.00
	Total:	112,368.00	112,368.00

[Save] [Cancel]

Employee Benefits Budget

- When Employee Benefits line items use "Grantee Personnel" you must tie each Employee Budget line items to a listed grantee personnel. Select a position from the list of previously added Personnel and complete the associated budget fields.

EMPLOYEE BENEFITS BUDGET LINE ITEMS

Last Update By: Amanda L Powers   **Last Update Date:** 4/4/2017 10:09:11 AM

Select an individual to assign Employee Benefits:

Position	Name
Accounting Supervisor	Katharina Schneider
Grants Specialist	Isabella Costa
Intake/CARE Specialist #1	{To Be Determined}
Intake/CARE Specialist #2	{To Be Determined}

Selected Individual:

Position: * Sexual Assault Advocate

Name: * Anne Shirley

Description of your computation

Year 1:* Annual Salary $35,000 x 75% VOCA funded = $26250 x 9.5% = $2,494

BY SOURCE	AMOUNT
Federal	2,494.00
Cash Match (New Approp.)	0.00
Total: Σ	2,494.00