

Budget Details – Quick Guide

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Budget Details (Proposal - New)

Agreement type: Grant

This page can be used to validate budgets developed off-line. For assistance completing this page, please review our [Budget Details User Guide](#). For School of Medicine proposals (except Fellowships), the RPM will complete this page.

Rate Schedule 1 [View rate schedules](#)

Activity: Organized Research (On Campus)

+ Add a period Auto Fill

	Period 1	Period 2	Period 3	Period 4	Total
Starts:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Ends:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Faculty/Other Key Person Effort

--Select one--

Budget Category	Period 1	Period 2	Period 3	Period 4	Total
Salary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
51100-Salary and Wages	\$	\$	\$	\$	\$
Benefits	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
51700-Fringe & Other Benefits	\$	\$	\$	\$	\$
Consultant Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
54201-Professional Services	\$	\$	\$	\$	\$
Materials & Supplies	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
55201-Materials Supplies Lab	\$	\$	\$	\$	\$
Travel - Domestic	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
52410-Domestic Travel/Lodging Allow	\$	\$	\$	\$	\$
Travel - International	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
52420-Foreign Travel/Lodging Allow	\$	\$	\$	\$	\$
Travel - Student	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
52410-Domestic Travel/Lodging Allow	\$	\$	\$	\$	\$
Equipment (non-fabrication)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
53101/55001-Cap Equip SU Owned	\$	\$	\$	\$	\$
Equipment - Lease	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
52901-Rent Leases Equipment	\$	\$	\$	\$	\$
Equipment - Fabrication	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
53101/55001-Cap Equip SU Owned	\$	\$	\$	\$	\$
Student Stipends	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
57000-Student Aid	\$	\$	\$	\$	\$
Student Tuition - Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
51970-Tuition Allowance	\$	\$	\$	\$	\$
Participant Support Costs	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
52435-Participant Costs NSF	\$	\$	\$	\$	\$
Patient Care	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
54601-Patient Care	\$	\$	\$	\$	\$
SLAC charges	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
56801-SLAC Charges External	\$	\$	\$	\$	\$
Animal Care	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
58701-Animal Care	\$	\$	\$	\$	\$
Other inclusions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
50001-Unallocated Exp	\$	\$	\$	\$	\$
Other exclusions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
50001-Unallocated Exp	\$	\$	\$	\$	\$
Institutional Allowance	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
58501-Interdept Costs Other	\$	\$	\$	\$	\$
TOTAL DIRECT	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

F&A Calculations

Rate Agreement: ▼

IDC Basis: Other Modified Basis ▼

[View or edit exclusions](#)

	Period 1	Period 2	Period 3	Period 4	Total
Rate:	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	
Base:	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0
F&A:	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0
BUDGET TOTAL	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0

Use the Budget Details page to validate budgets developed off-line

FEATURES:

- Validate calculations of entered budgets
- Rolls up multi-rate budgets
- Captures faculty proposed effort for Other Support reports
- Pushes budget figures into PTA setup transactions for new/renewal projects
- Auto-selection of the applicable Rate Agreement based on the start date of the first budget period
- Auto-calculation of IDC based on the selected Activity and Rate Agreement
- Ability to manage customized exclusions when the IDC base is not MTDC or TDC
- Direct link to DoResearch F&A rate page
- Once PDRF is routed, quick access to a summary budget without downloading an attachment

Rate Schedules & Activity

Rate Schedule 1 View rate schedules

+ Add a rate schedule

Activity: Organized Research (On Campus)

- Organized Research (On Campus)
- Organized Research (Off Campus)
- Sponsored Instruction (On Campus)
- Sponsored Instruction (Off Campus)
- Other Sponsored Activity (On Campus)
- Other Sponsored Activity (Off Campus)

Create a [Rate Schedule](#) for each separate indirect cost rate applied. If your proposal budget includes more than one [Activity](#) and applies more than one F&A rate in accordance with [university policy](#), then click “[Add a rate schedule](#)” to create a new Rate Schedule. Each Rate Schedule should have a different Activity. If your proposal budget includes only a single Activity (e.g. Organized Research (On Campus)), then you will have only one Rate Schedule. To view current F&A rates, click “[View rate schedules](#)”.

Budget Periods

+ Add a period

	Period 1	Period 2	Period 3	Period 4	Total
Starts:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Ends:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Auto Fill

Enter [Budget Periods](#) that align with the budget being submitted to the sponsor. If your proposal has more than 4 budget periods, click “[Add a period](#)” to add additional periods. If your proposal budget includes multiple 12-month periods, use the [Auto Fill](#) feature - simply enter the Period 1 start date and then click Auto Fill and the remaining period dates will be filled in. To delete a period, click the [trash can icon](#) for that Period.

Faculty Effort

Faculty/Other Key Person Effort

--Select one--

--Select one--

William J Nelson

Ann Arvin

Ann Arvin
PI (Academic/Summer)

% / % % / % % / % % / %

Remove

+ Add a faculty or other key person from list on proposal

For each budget period, enter the [percent effort](#) for all faculty devoting effort to the project. The PI and all OSFs entered into the PDRF will be available in the picklist. The effort entered on this page is reflected as the proposed committed effort on Other Support reports.

Budget Entry

Budget Category ¹	Period 1	Period 2	Period 3	Period 4	Total
Salary 51100-Salary and Wages	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ 0
Student Tuition - Fees * 51970-Tuition Allowance	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ 0
Other inclusions 50001-Unallocated Exp	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ 0
Other exclusions * 50001-Unallocated Exp	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ 0
TOTAL DIRECT	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ <input type="text"/> 0	\$ 0

Enter the **Direct Costs** into applicable Budget Category across the Periods. Use Other inclusions/Other exclusions for costs that don't fit into a Category. Round entries to the nearest dollar. Do not include the cost sharing budget on this page. If the proposal is awarded, your Institutional Official will update this budget as needed and the figures will be pushed into the PTA setup transaction for new/renewal projects. **Budget Categories** denoted with an asterisk (*) are excluded from IDC burdening. *(Hint: in the event the budget totals are off by \$1 due to rounding, try entering \$1 into either the Other inclusions/Other exclusions category to get the budget to match)*

F&A Calculations

A F&A Calculations

Rate Agreement:

- FY15 - FY16 Federal Rate Agreement
- Rate Change
- Pre-Approved Waiver
- Project Only Waiver

B IDC Basis:

- TDC
- MTDC
- Other Modified Basis

A The applicable federally negotiated **Rate Agreement** will be defaulted based on the start date of budget Period 1. The **Rate** displayed will not be editable. Select **Pre-Approved Waiver** when applying an IDC rate on the Pre-Approved IDC Exception List. Select **Project Only Waiver** if a project-specific IDC waiver has been secured from the Dean of Research Office. When using a waived rate, the Rate fields will be editable. Do not use Rate Change without consulting with your Institutional Official.

B Select the applicable **IDC Basis**. **TDC** is total direct costs and will apply IDC to all Budget Categories. **MTDC** is as defined by the federal government; Budget Categories excluded from the IDC base will be marked with an asterisk. Select **Other Modified Basis** when the sponsor requires a custom base for IDC application. For Other Modified Basis, click "**View or edit exclusions**" to identify the budget categories to be excluded from the IDC Base.

IDC Basis:

[View or edit exclusions](#)

Exclusions

Select budget categories to be fully or partially excluded from IDC Base

Salary	<input type="text" value="Not Excluded"/>
Benefits	<input type="text" value="Not Excluded"/>
Consultant Fees	<input type="text" value="Fully Excluded"/>
Materials & Supplies	<input type="text" value="Exclude all but specified amount"/>
	<input type="text" value="Exclude all but specified percent"/>
	<input type="text" value="Other"/>

The Base and F&A are calculated automatically based on the Activity, Rate Agreement and IDC Basis selected.