VERAS BUDGET PREPARATION GUIDE

Vandals Electronic Research Administration System

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VERAS Budget Preparation Guide

Introduction

This manual will provide budget preparation guidance to users preparing proposal applications in VERAS. For Proposal Assistance guidance, please refer to the VERAS Proposal Assistant User's Guide found in the Help section under VERAS Manuals.

If you have questions that are not addressed in this guide, please contact osp-web@uidaho.edu or call 208-885-6651.

Login
https://VERAS.uidaho.edu

Find your proposal
Find the proposal that you will be adding a budget through **Proposal Assistant>View My Proposals:**
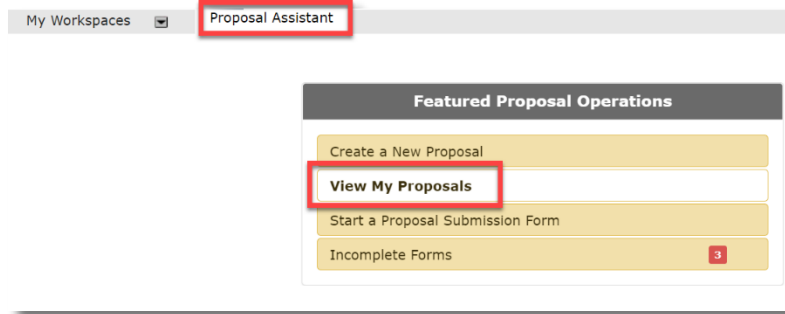
Select the proposal from the results:

From the **Section View of the Application,** select **U of I Budget and Budget Narrative/Justification**

U of I Budget and Budget Narrative/Justification

*In order for VERAS to track proposed funding amounts at the award stage you must, at a minimum, create a **Basic Budget** in the **Add a Budget** question and upload your budget spreadsheet and budget justification. If this is your first time submitting a proposal in VERAS we recommend reviewing the guidelines which are included in the **Add a Budget** section that is after selection of budgeted personnel below.*

*If this is a Grants.gov submission, we recommend you create a **Detailed Budget** that will merge information into the Grants.gov forms, otherwise the SF424B will need to be created manually. The detailed budget format allows for escalation (esc) rates, separation of multiple funding periods, and dropdowns for current fringe benefit and F&A rates.*

Budget

- Selecting **Add a New Budget** will allow you to complete your budget entry in one of three ways:
    - **Detailed Budget:** For most Grants.gov submissions, you will want to complete your budget this way
    - **Modular Budget** This should be based on your detailed budget for internal purposes
    - **Basic Budget:** You must at least complete a Basic Budget and upload a spreadsheet for each proposal, even if the proposal is not being submitted through Grants.gov

Budget Setup

- These selection will allow the system to setup your budget appropriately:

- The table below defines each of the items in the Budget Setup. You will not be able to start the actual budget until you define the Budget Setup and click the **Save Changes to Budget Setup** button.
- Required fields are noted with an *:

Descriptive title for this Budget Version*	A text field for the title of the budget.	
Select the budget format*	A drop down list with three options: Detailed Budget Detailed Modular Basic Budget	The option selected will change the level of detail you can input for the budget.
What is the budget action?*	A drop down list with multiple options: New Continuation (provide Continuation Period) Supplement (provide Supplement Period) Renewal (provide Renewal-beginning budget period (or BP)) No Cost Extension (Provide NCE Number)	Selecting an option identifies what type of budget is being created. Certain selections will prompt you for additional information.

|		
Do you want to use an Academic Calendar?*	A Yes/No selection.	Specify Yes if your budget is based on an Academic Calendar Year. Specify No if your budget is based on a Fiscal or Other Calendar Year.
Number of Budget Periods?*	A Numeric value.	Enter a numeric value specifying the number of budget periods. You must also select from a drop down list what a period means for this budget. Available budget period lengths: 3 months 6 months 1 year Custom After entering the number of periods, you will be prompted to ender the Start and End Date for each period. You only need to enter the Period 1 Start Date, and based on the Period Length, the rest of the dates will populate. *The budget period Start and End Dates must match the dates entered in the Project Application for the Project Start Date and Project End Date. If these dates do not match, you will receive an error when attempting to save the Budget Setup page.*
Is there cost sharing?*	A Yes/No selection.	At this time we are not utilizing the cost share function in VERAS. If you have cost share, please mark this as **Yes,** but note that you will not enter cost share into the budget here. There is a separate question in the application for your cost share details (question 9.4 in the 'UI Budget and Budget Narrative/Budget Justification' section).
Apply a salary cap?*	A Yes/No selection.	Specify Yes to apply a salary cap. Specify No to turn off the salary cap in the budget. Specifying Yes will prompt you to select the salary cap from a drop down list.
Use actual fringe rates or projected fringe rates?*	Selection of two options: Actual Fringe Rates Projected Fringe Rates	***Please specify Projected Fringe Rates.*** This allows you to select from the consolidated fringe rates list as negotiated by the University.
Maximum allowed support request?	Selection of three options: Salary Salary and Fringe No	Not common
Select the F&A base code:*	A drop down list with multiple options for Indirect Cost Base Codes.	Most commonly used are Modified Total Direct Cost and Total Direct Cost.
Select the F&A rate/fixed amount:	A drop down list with multiple options for Indirect Costs Rates.	Selecting an option will populate a Starting F&A Rate based on the University's negotiated rates.
Is this a K99/R00 proposal?	A Yes/No selection.	This is specific to NIH proposal types and will usually be set to No.
Round totals to whole dollar?*	A Yes/No selection.	Specifying Yes will round budget totals to a whole dollar. Specifying No will display totals without rounding.
Budget Comments	A text field.	You may add any necessary comments.
Budget Justification	A document upload feature. *Will not be available until the budget setup page is saved	Upload Budget Justification. This document can merge to the Grants.gov Opportunity Package.
Attach additional budget related documents	A document upload feature.	Upload any other supporting documentation for the budget.

	*Will not be available until the budget setup page is saved	

- After entering the needed information for the Budget Setup page, click the **Save Changes to Budget Setup** button. This will create a Detailed Budget tab on the page:

Salary Cap

- If you are applying to NIH, use the NIH salary cap or if your sponsor specifies a different cap, choose 'Other' and provide the cap $ amount.
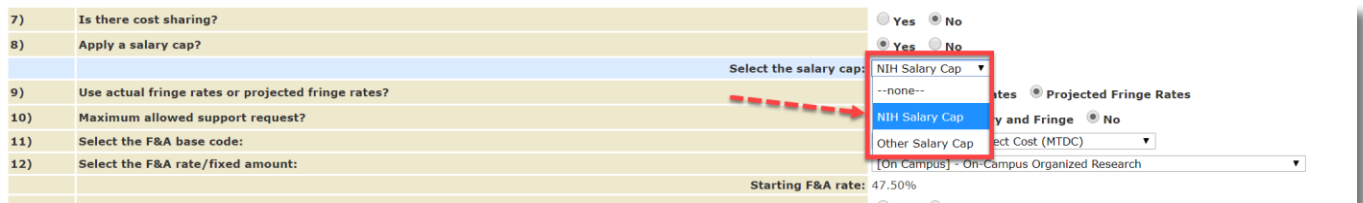
- Any personnel added to the budget with a recorded salary greater than the salary will have their Base Salary adjusted to the Salary Cap amount, as shown in the screenshot below. Note that the salary cap is based on an *annualized* salary, so academic-year employee salaries must be converted before evaluating as to whether they are over the cap:

Fringe Rates

- In the Budget Setup tab, the system will default the fringe rates to 'Projected Fringe Rates'. U of I's consolidated fringe rates have been entered into the system, so please *do not* change this to 'Actual'.
- The example below lists two Senior Key Personnel records in the budget:

Maximum Allowed Support Request

- In the Budget Setup tab, you have the ability to indicate whether or not to apply a maximum dollar amount to budget salary line items. This will generally *not* be used unless the sponsor specifies this restriction in the RFP. You can indicate whether to apply the maximum amount to either salary's only or salary and fringe benefits, as shown in the screenshot below. This question in the Budget Setup tab defaults to the No selection, so if you want to utilize this in the budget, select either the Salary or the Salary and Fringe option.

- Once you select either the Salary option or the Salary and Fringe option, a field below will populate, allowing you to specify the maximum support amount.

- Within the Budget Details tab, any personnel entered as Senior Key Personnel or Other Personnel will display the maximum amount. If you selected Salary, the cap will be applied to the requested salary in the **Req Salary** column, as shown in the screenshot below.

- If you selected Salary and Fringe, the cap will be applied to the requested salary plus any fringe amounts applied and the cap will be displayed in the **Totals** column.

Detailed Budget / Detailed Modular Budget

- When you choose the budget format options **Detailed Budget** or **Detailed Modular Budget** the input process is the same for both formats, as described in the sections below. The **Basic Budget** process is described below.
- The application type controls the budget format you will choose when submitting to sponsor. If you are submitting to NIH, you must follow the NIH guidelines found here https://grants.nih.gov/grants/how-to-apply-application-guide/format-and-write/develop-your-budget.htm. Both **Detailed Budget** and **Detailed Modular Budget** will merge data into the Grants.gov opportunity's budget attachment, however, the Basic Budget will not. The **Detailed Modular Budget** will enforce a $250,000 direct cost maximum per budget period and will also round direct costs up or down to the NIH specific regulations.

- The budget setup details will control the information that displays in the **Detailed Budget** page. Also note, that the tab name changed to the budget format selected, as shown in the screenshot below:

- The top portion of the page contains buttons to control the page.
  - **Download** – At any point of populating the budget you can download the budget to an Excel document
  - **Refresh Salary** – At any point of populating the budget you can refresh salary rates to grab the latest information from the system. This will not be available until the feed between Banner and VERAS is completed later in the implementation process.

- o **Indirect Cost Details** – A popup window will open detailing the Indirect Cost information based on the F&A Base Code selected in Budget Setup. This page will not list any information until more information is added to the budget
- o **Clear Budget Period Data** – At any point of populating the budget you can clear out the page of all details and start fresh. Be sure that you want to restart all totals before clearing the data; you will not be able to restore any work once you click this button
- o **Calculate and Save Changes** - At any point of populating the budget you can save the changes to your budget and calculate budget totals

- • Also at the top of the page are tabs for each budget period specified in the Budget Setup as well as a Summary tab. You can switch between the budget periods by clicking on the appropriate tab. The Summary tab is a read only page that displays a summary of all funds requested for each budget category and the totals.

- • Details specific to the Budget Period tab selected display in the area below that tab. Read only display is the budget period Start Date, End Date and Salary Cap. To the right of this are the current budget totals. These totals will update as you input information into the budget and click the **Calculate and Save Changes** button.

- • Below the Start and End Dates of the budget are the periods cost sections listed A. – J. on the screen. Each section represents a different portion of the budget, from Key Personnel labor costs to Direct and Indirect Costs. As you work in a section, you can expand that section on the page to show only that area on the screen.
  - o For example, in section A. Senior Key Personnel you can click on the ⤢ icon to expand this section to a full page

- • This will cause the Senior Key Personnel section to open in a full screen view. From here you can add your records and manage this portion of the budget. When you are finished and are ready to return to the main budget screen, click the **Return to full screen** button.
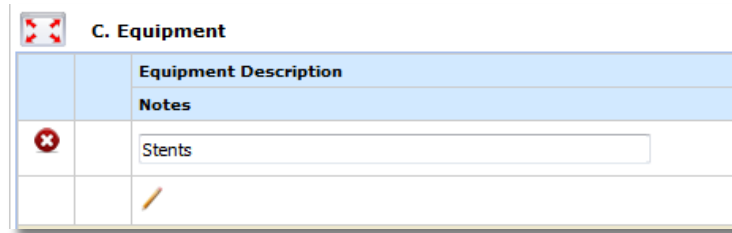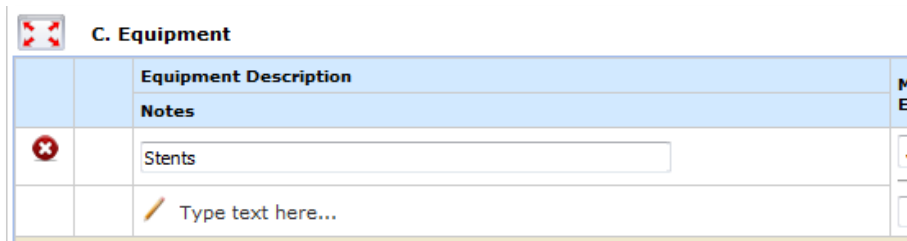
- Each line item in the budget has an area designated for any notes that need to be included. To access the note, click the ✏ icon.

- A small pop up will open allowing you to type in your note. Click the **Save** button when you are finished. Click the **Cancel** button to leave the note without saving the text.
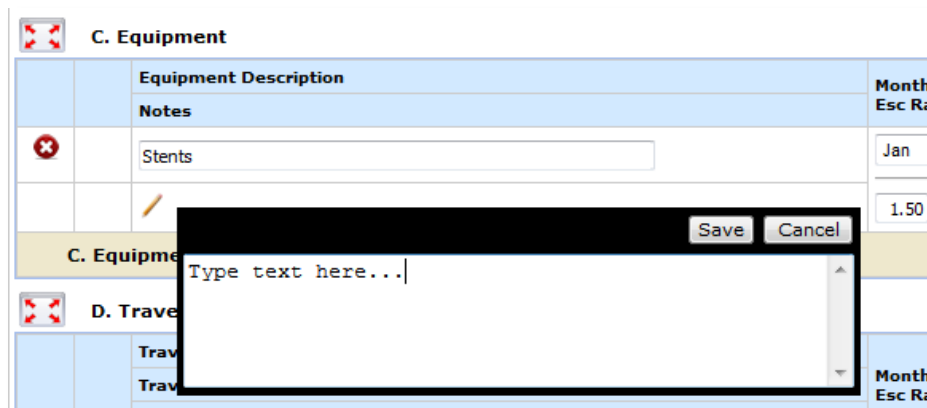
The note will be added to the budget line item, as shown in the screenshot below.

A. Senior Key Personnel and

B. Other Personnel

- Add any Senior Key Personnel and Other to the budget in these first two sections. You can add institutional personnel, or to be determined personnel. The functionality to add users to either Senior Key Personnel or Other Personnel is all done in the same area, following the steps below.
- To add existing VERAS users, click the **Add Institutional Personnel** button. The Project Personnel Pool window will open. From here you can choose to add personnel to the budget.
  - o **Project Personnel Pool** – This will allow you to add users listed from section 2.0 of the Project *Application*. The personnel are listed at the top portion of the page. Underneath this list are three groups where a user could be listed based on their specified budget role. Once you select a user to add to the budget, that user will populate in one of the three groups. Add any of these users to the budget by clicking the 📁 icon next to the name.

- o You can then select the Personnel Category – Senior Key Personnel, Non-Key Personnel, or Other Significant Contributor.

- o After selecting the appropriate Personnel Category, click the **Save** button located at the bottom right corner of the window. The user will populate in the appropriate category at the bottom of the page. From here you can remove a user from a category, Edit the record to move the user to a new category or change the order the user should display in the list.

- You can continue to add personnel from the Project Application to the budget following the same steps.

- **User Search** – Users do not have to have a role on the Project to be listed on the budget. To add any other VERAS user to the budget, click the **User Search** button. This will bring up search criteria allowing you to search for a VERAS user to add. Enter your search criteria then click the **Find User/Search Directory** button.

- When your user displays, click the icon in the **Select** column. *If the person you are searching for is not in the user list, they will need to submit an account request here:* https://veras.uidaho.edu

- You can then specify the users **Role on Project** and **Personnel Category**. The Role on Project list will populate with your list of current Project roles.

- When you save the Role on Project and Personnel Category, the user will populate in the appropriate category at the bottom of the page. From here you can remove a user from a category, Edit the record to move the user to a new category or change the order the user should display in the list.

- Remember that the category you place the user in will determine where in the budget they will be added. Any user placed in Senior/Key Personnel and Other Signification Contributors will populate in section A. of the budget. Non-Key Personnel will populate in section B. of the budget.
  - Any user you add will then populate in the appropriate section on the budget.

- You can click the **Add To Be Determined Personnel** button within the Budget Details tab to put a placeholder role on the budget, without naming a user.
- A new window will open. From here you can choose to add a role to the budget. The available roles are listed at the top portion of the page. To add a role to the budget, click the 📁 icon next to the name.

- You can then specify the Personnel Category. Click the **Save** button to add the role to the budget.

- When you save the Personnel Category, the Role will populate in the appropriate category at the bottom of the page. From here you can remove a role from a category, edit the record to move the user to a new category or change the order the user should display in the list.
- Note: The only role not available to add in To Be Determined Personnel is the Principal Investigator role. This user must be listed on the Project in section 2.0 of the Project Application.

- When you return to Budget Details, the role added will populate in the appropriate category (either Senior Key Personnel or Other Personnel)

- Once you have added users or to be determined users, information related to their salary will populate in the A. Senior Key Personnel or B. Other Personnel table.
- You can delete personnel directly from the section by clicking on the ⊗ icon.
- Other columns in the Senior Key Personnel and Other Personnel sections are as follows:
    - **Name/Role** - The name and/or role of the personnel selected will display here.
    - **Original Salary -** Once the feed between Banner and VERAS is complete later in the implementation process the salary information associated to the user's account will pull in automatically; in the interim this may be added directly. If you added To Be Determined Personnel or a user with no salary information, this field will display $0.00.
    - **Base Salary** - The base salary of the project personnel is entered in this field.
    - **Percent Effort** - The effort percentage the user will be committing to the Project can be entered here.
    - **Cal Mon**- The calculated total of calendar months.
    - **Month App. Esc (Escalation) Rate** - You can apply escalation rates to personnel salary in these columns. First, choose a month from the drop down list to indicate to the system when the escalation rate will take effect within the budget period. Then enter the Escalation Rate. If you need to capture more than one escalation per budget period, you can set the date of the new rate in the second **Month App. Esc Rate** column, as shown in the screenshot below. The information in the second column will remain grayed out and un-editable until information is entered in to the first column.

    - **Req Salary** - This area will populate with the personnel's total salary based on the Base Salary, Percent Effort, and Escalation Rate.
    - **Fringe -** Use the drop down list to choose how to calculate the Fringe Rate. The items in this list will vary depending on the configurations in your system. When you select an item, the percentage field below it will populate with the associated Fringe Percentage.

- o **Fringe Amount -** This field will display the total fringe amount for the user based on the percentage selected in the previous column.
  - o **Totals -** This is the total amount of expenses that will be used towards the budget totals. Fields that are included: salary, escalation, and fringe benefits.
- Enter information for all personnel in both sections. When all necessary amounts/totals have been entered, click the **Calculate and Save Changes** button.
- The bottom of the Senior Key Personnel table will total all cost sharing information in a table (*note: we are not currently using the cost share function in the detailed budget section, this information will be collected later in the application, after the budget is attached*). Below that will be a summary of the totals for all personnel in the table.

- Other Personnel will also update with the totals. Below the Other Personnel totals, All Personnel Totals will display, as shown in the screenshot below:

C. Equipment

Note: please limit to capital equipment items >=$5,000 as this section is excluded from the indirect cost base calculation when using modified total direct costs; equipment < $5,000 in per unit cost should be listed under Materials and Supplies

- Equipment costs can be added to the budget in this section by selecting the **Add Equipment** button.

- A record will be inserted in the category. Enter the detail for the equipment item, the escalation rate and month applicable if any, then the unit price and unit quantity.
- Add additional Equipment records as needed.
- When all necessary amounts/totals have been entered, click the **Calculate and Save Changes** button to add the Equipment Totals to the budget.

D. Travel

- Travel costs and expense codes associated with a project can be added to the budget within this section.
- To add travel, click the **Add Travel** button.
- A record will be inserted in the category. Select the Travel Type (Domestic or Foreign travel costs) from the Travel Category drop down list and enter the Travel Description. You can also enter in the escalation rate and month applicable if any, then the unit price and unit quantity.
- Additional Travel records may be added as needed.
- When all necessary amounts/totals have been entered, click the **Calculate and Save Changes** button and the Travel Totals will be added to the budget.

E. Participant Trainee Support Costs

Note: do not include Assistantship tuition and fees in this area - those will be included in the 'Other' section of the budget

- Participant Trainee Support Costs allows a user to associate any trainee costs to a project budget.
- To add trainee support costs, click the **Add Trainee Support Cost** button.
- A list of training items will populate in the table. You can enter the escalation rate and month applicable if any, then the unit price and unit quantity for each item. If you are not going to use a Trainee Category in your budget, you can click on the to remove the category. When you do this, a button will populate at the top of the table called '**Add Trainee Support Cost** allowing you to add the category back to the budget, if necessary.

E. Participant Trainee Support Costs

	Trainee Category	Month App. Esc Rate	Unit Price	Unit Quantity	Totals
	Notes				
❌	Tuition/Fees	--none-- ▼	$ 2,500.00	1.00	$2,500.00
	✏	0.00 %			
❌	Health Insurance	--none-- ▼	$ 3,000.00	12.00	$36,000.00
	✏	0.00 %			
❌	Stipends	--none-- ▼	$ 50.00	25.00	$1,250.00
	✏	0.00 %			
❌	Travel	--none-- ▼	$ 500.00	3.00	$1,500.00
	✏	0.00 %			
❌	Subsistence	--none-- ▼	$ 0.00	0.00	$0.00
	✏	0.00 %			
❌	Other Enter Description:	--none-- ▼	$ 0.00	0.00	$0.00
	✏	0.00 %			
	Number of Participants/Trainees: 25				
	E. Participant Trainee Support Costs			**Total:**	**$41,250.00**

- At the bottom of the list of categories, you will be able to input the estimated number of trainees. When all necessary amounts/totals have been entered, click the **Calculate and Save Changes** button and the Participant Trainee Support Costs will be added to the budget.

F. Other Direct Costs

- Other Direct Costs can be entered in the appropriate categories listed in this portion of the budget. Each category has its own table where you can add the Description of the item, the Escalation Rate and Month Applicable, Unit Price, and Unit Quantity.
- The categories available in Other Direct Costs are Materials and Supplies (shown in the screenshot below), Publication Costs, Consultant Services, ADP/Computer Services, Subawards / Consortium / Contractual Costs, Equipment or Facility Rental / User Fees, Alterations and Renovations and Other Direct Costs. To add a direct cost to any of the categories, click the **Add Direct Cost** button above the appropriate table. Note that equipment with an individual item cost of <$5000 should be included under Materials and Supplies.

F. Other Direct Costs

	1. Materials & Supplies				➕ Add Materials & Supplies
	Description	Month App. Esc Rate	Unit Price	Unit Quantity	Totals
	Notes				
❌	Office supplies	--none-- ▼	$ 10.00	50.00	$500.00
	✏	0.00 %			
	1. Materials & Supplies			**Total:**	**$500.00**

ADP/Computer Services

- When you are adding records to the ADP/Computer Services section, you can specify the description of the record you are adding by selecting "Data Network Fee" or "Other" from the drop down list, as shown in the screenshot below. If you select "Other", you can type in the description.
- The remaining information can be entered similarly to the other sections in the budget.

Subawards / Consortium / Contractual Costs

- If you indicated within the project application that you have subrecipients, you can enter in any subaward information in this section. When you add a record you will be able to select any subrecipient on the project from the drop down list.
- You can also specify both Direct and Indirect Costs in the columns provided.

Equipment or Facility Rental/User Fees

- When you are adding records to the Equipment or Facility Rental/User Fees section, you can specify the description of the record you are adding by selecting "Equipment Rental", "Facility Rental/User Fees" or "Off Campus Rent" from the drop down list, as shown in the screenshot below. The remaining information can be entered similarly to the other sections in the budget

Other Direct Costs

- The University of Idaho will only use 'Tuition/Fee Remission' or 'Other' from the drop down list.

Tuition Fee Remission/Other

- Once you choose one of the items from the drop down list, the section will be renamed to your selection. In the example below, Tuition/Fee Remission was selected and the section was renamed from 'Other Direct Costs' to 'Tuition/Fee Remission'.
- The remaining information can be entered similarly to the other sections in the budget.

- When all necessary amounts/totals have been entered into the Direct Cost categories, click the **Calculate and Save Changes** button and the Direct Cost items will be added to the budget.

G. Direct Costs Total

- Underneath Section F are the section totals, as shown in the screenshot below. Also shown here are the total Direct Costs in Section G. This displays the totals for all the previous sections (A-F).

H. Indirect Costs

- This section shows the associated indirect costs with a project budget. You may add a description in the note area, but any changes needed to the Indirect Costs Category must be made in the Budget Setup area of the budget.

- Click the Calculate **and Save Changes** button after adding Description and Notes if needed.
- The Totals displayed in this section are based on items added in the Other Categories. You can obtain detail about what is being calculated in the Totals for Indirect Costs by clicking the **Indirect Cost Details** button at the top of the Budget page.
- This will open a window displaying what is included in indirect cost calculations. Depending on which selected in Budget Setup, you may or may not be able to modify what is included in the Indirect Cost calculation.

Selected Items to be used for period BP1 with the F&A base code: A - Modified Total Direct Cost (MTDC)   [Close]

A&B Personnel

Include Salary	Include Fringe		Salary Totals	Fringe Totals	Totals
✓	✓	All Personnel from A& B	$257,689.00	$103,992.00	$361,681.00

D. Travel

Include	Travel Category	Travel Description	Totals
✓	Domestic Travel Costs	On Site Training	$9,000.00
✓	Foreign Travel Costs	International Training Seminar	$12,000.00

E. Participant Trainee Support Costs

Include	Trainee Category.	Totals
✓	Health Insurance	$36,000.00

- Indirect cost items are added to the budget based on the F&A Base Code and F&A Rate selected in the Budget Setup tab. The items selected here calculate the Indirect Costs for the budget.

7)	Use actual fringe rates or projected fringe rates?	⦿ Actual Fringe Rates ○ Projected Fringe Rates
8)	Select the F&A base code:	A - Modified Total Direct Cost (MTDC) ▾
9)	Select the F&A rate/fixed amount:	[On Campus] - Sponsored Research ▾
	Starting F&A rate: 57.00%	
10)	Round totals to whole dollar?	⦿ Yes ○ No

- If you choose an F&A Rate from the drop down list, it may have adjusted rates, depending on the University's negotiated F&A rate agreement. If that is the case, there will be more than one line item in this section in the budget effective when the F&A rate is scheduled to change.

H. Indirect Costs

Indirect Cost Category Description Notes	Start Date	End Date	Indirect Cost Rate	Indirect Cost Base	Totals
A - Modified Total Direct Cost (MTDC)	04/07/2014	07/01/2014	57.00 %	$106,081.82	$60,467.00
A - Modified Total Direct Cost (MTDC)	07/01/2014	04/06/2015	58.00 %	$345,382.68	$200,322.00
				Total Indirect Costs:	$260,789.00

I. Total Direct and Indirect Costs

- This area of the budget will display the calculated total for both Direct Costs and Indirect Costs. If you have not saved the budget, this number may not be accurate.

I. Total Direct and Indirect Costs

Total Direct and Indirect Institutional Costs (G + H) $737,279.00

J. Fees

DO NOT USE

Budget Periods

- After all the necessary fields for the 1st budget period **(BP1)** have been entered and your budget has multiple periods, move on to the remainder of the budget periods. To do so, click on the tab that corresponds with the

budget period to be setup. If the selected Budget Action was Renewal the budget periods data will copy from the prior budget period, allowing you modifications as necessary.
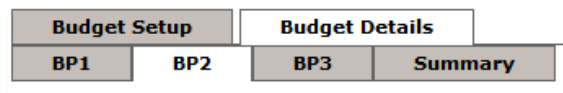
- Follow the above process for each budget period or, if the totals in each section will be similar to the previous budget period, copy the data to the next period.
- At the top of the page, a **Copy Previous Budget Period** button will display in all budget periods that are not Budget Period 1.
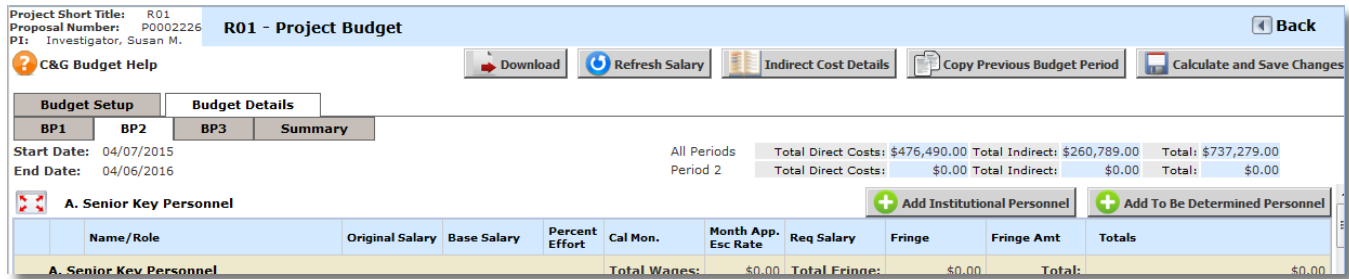
- When you choose to copy from the previous budget period, the system will copy over the information you added in Budget Period 1 and apply it to the next budget period.
- Note: If you copy data in a budget period, it only looks at the previous budget period. For example, if you copy data in Budget Period 3, data from Budget Period 2 will copy over, not Budget Period 1.
- The screenshot below shows an example of Budget Period 2 after data has been copied. Note that the Copy **Previous Budget Period** is no longer displayed.
- The totals for each section have copied over, including any Escalation applied to the sections. For example, in section 1. Senior Key Personnel, the Principal Investigator had a 3% rate increase so the Base Salary is recorded as $206,000, where in Budget Period 1 it was recorded as $200,000.
- You will see the totals for the current budget period and all periods combined at the top of the page.
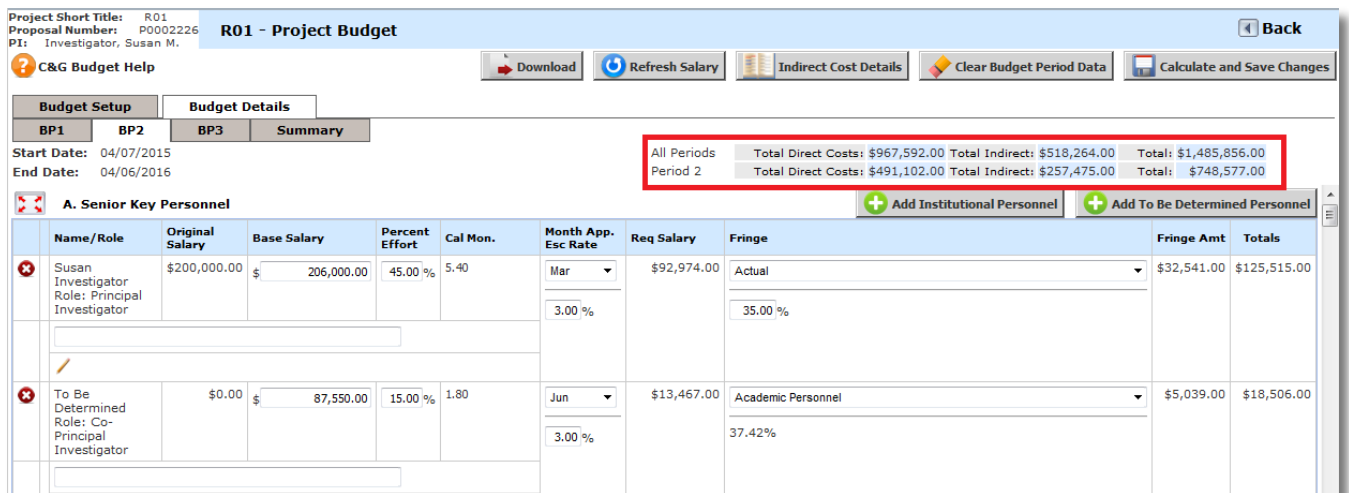
- After copying data from the previous budget period, you may make any necessary changes then click the Calculate **and Save Changes** button and proceed to any other budget period, following the same method.

- The Summary tab will display the totals for each category for each budget period.

- You can switch the view of the summary tab between Detailed Summary and PHS 938 Modular Budget by selecting the view in the drop down list at the top of the page.
- When you switch to the PHS 398 Modular Budget view, the system will alert you if any of your budget period Direct Costs exceeds the NIH allowance of $250,000 per period.

- You can also download the budget to an Excel spreadsheet or PDF by clicking the **Download** button. This will cause a small popup within the browser asking which format to download the file. Make your selection and click the **Download Budget** button.
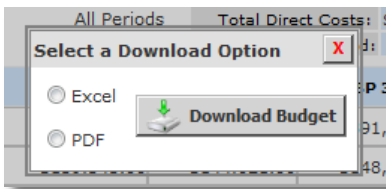
- You may be prompted by your Internet browser to Open or Save the file, depending on your Internet settings.

Basic Budget

- When you choose the Budget Format "Basic Budget" you must answer the same questions in the Budget Setup as described in the Add a New Budget section above. Once you populate the information in this tab and click the **Save Changes to Budget Setup** button, a new tab will populate called **Basic Budget**.

- The Basic Budget tab contains all the budget periods in a series of columns, with the last column on the page containing the Summary of all periods combined. Each row in the Basic Budget is described below.

- o **Start Date** – The budget period starting date will populate in this column. This information comes from the Budget Setup tab.
- o **End Date** – The budget period ending date will populate in this column. This information comes from the Budget Setup tab.
- o **PI Effort** Committed (%) – Enter the PI Effort for each budget period. As you enter information into each budget period, the table will update the total in the Summary column, as shown in the screenshot below.
- o **PI Salary Request** (%) – Enter the PI Salary Request for each budget period. As you enter information into each budget period, the table will update the total in the Summary column, as shown in the screenshot below.

- o **Direct** – Enter the total Direct Cost for each budget period. As you enter information into each budget period, the table will update the total in the Summary column, as shown in the screenshot below

- Indirect – Enter the total Indirect Cost for each budget beriod. As you enter information into each budget period, the table will update the total in the Summary column, as shown in the screenshot below
- Total – Information in this column for each budget period will update with a total of the Direct Cost plus Indirect Cost. The Summary column will total each amount from all budget periods.

Direct	$	250,000.00	$	255,000.00	$	260,000.00	$ 765,000.00
Indirect	$	25,000.00	$	27,500.00	$	30,000.00	$ 82,500.00
Total	$	275,000.00	$	282,500.00	$	290,000.00	$ 847,500.00

Submitting a Budget

- A Budget may be associated to a Project Submission form and submitted to the Office of Sponsored Programs for review. Within the form, a Project Budget data value will allow the association of an existing budget to the form. In this example, the Project Application is being used. Shown below is a section within the Application that will allow the budget to be attached.
- If a budget has not been created for the project, the **Select from Budget Project Pool** button will not display.

- Clicking the **Add a New Budget** button will navigate you to the Budget Setup page where you can create a new budget following the same steps provided above in the Add a New Budget section.
- When clicked, the **Select from Budget Project Pool** button causes a window to appear listing all budgets that currently exist within the Project. Budgets that are not currently attached to a submission form will display the **Attach** and **Delete** buttons and will display a "Draft" status. When a budget is associated to a Project form, the Attach and Delete buttons will no longer be available for that budget and the **Status** will update to "Attached".

- Additional budget information can be expanded by clicking the **View Details** icon. This will display a summary of the totals for the specific budget.

- Click the icon in the **Attach** column next to the appropriate budget to attach it to the form.
- If Personnel associated to the budget are not included in the Project form, you will receive that information when you associate the budget to the form. You can choose to add the user to the form by selecting the checkbox next to the Forms option in the Include **In** column, however it is not required. Before you can continue, you must click the **Save Personnel to Project** button at the bottom of the window.

- The budget will display in the table below the Budget data value. You can detach the budget by clicking on the icon in the **Detach** column. This will remove the budget from the form, allowing you to add another budget in its place.

- If you specified to add any personnel from the budget to the form, the Project Personnel data value will update with that information, as shown in the screenshot below.

- When the Project Application form is submitted, the budget information will display within the Signoff Page, as shown in the screenshot below.

- The budget will display as an attachment to the form, as shown in the Submission Components view in the screenshot below.

Project Personnel

This question applies only to Grants.gov submissions. This is where biosketches or current and pending forms can be uploaded for each key personnel. To include project personnel in grants.gov budgets and/or forms, select **Edit Personnel Details** and check the Budget and/or Forms boxes as appropriate.

- The order the personnel appear in this section will determine the order they appear in the budget and grants.gov forms

- Select **Add Personnel** to include external personnel who need to provide biosketches or current and pending support forms and/or need to be included in grants.gov forms (e.g., subrecipient Co-PIs or collaborators):

External personnel cannot be included in the budget here. Their salary costs would be included in the Subrecipient, Consultant, Collaborator section

Cost Share

- Complete the cost share question and table, and attach any required documentation

- *Note: Voluntary cost share is not generally allowed. Additional guidance is provided in the application form section*

Cost Accounting Standards (CAS) Exemption

- Indicate whether or not you will request a Cost Accounting Standards (CAS) exemption for project costs that would normally be included as a part of F&A.
- If you will request a CAS exemption, complete the remaining questions, provide the cost details and supporting documentation, and provide the justification of special circumstances to directly charge the expenses to your project.
- The OSP Cost Accounting unit will review the request and make a determination of allowability.

Program Income

- Indicate the amount of program income that will be generated from project activities, if any.

Multiple Indexes

- If you have multiple investigators and want each investigator/department to have distinct budgets, provide the preferred index title, which PI/co-PI will be responsible for the index, and the responsible unit.

Grants.gov Submissions - Select or download opportunity packet

This question will only appear if you selected 'Yes' to the grants.gov opportunity/submission question in section 5.0, Proposal Guidelines & Basic Submission Information.

- This is where you will select or download and attach a grants.gov opportunity packet to your proposal.

- To Add a New Grant Opportunity:

- After the selection of the opportunity, attach it to your proposal:

Merging the Budget to Sponsor Forms and Grants.gov Opportunities

- The Detailed Budget and the Detailed Modular budgets created in VERAS will merge data into the following Grants.gov forms:
  - RR_Budget (V1.1 , V1.3)
  - RR_Budget10 (V1.1, V1.3, V2.0)
  - RR_FedNonFedBudget V1.1
  - RR_`FedNonFedBudget10 V1.1
- Other Budget Forms associated to Grant Opportunities will not merge data, but will allow you to enter data before submitting to the sponsor.
  - The screenshot below displays an opportunity associated to a Project Application. Clicking on the icon in the **Edit**/**View** column will open the contents of the package, including any budget attachments, if available.

- When you open the opportunity, the contents will be listed in a new page. Some opportunities will contain a budget attachment, as shown in the screenshot below. If you have already completed the proposal budget and associated it to the proposal application, and the budget form used on the opportunity is one of the RR forms listed above, information from the budget can merge into this attachment. Click the icon in the **Open**/**Add** column.

- Information entered into the proposal budget will populate into the budget attachment form, as shown in the screenshot below, from all entered budget periods, with a summary tab included.
- You can switch between the budget periods by selecting the corresponding tab at the top of the page.

Modifying the Budget

- You can add, edit, and remove data from these budget forms, however *any changes you make to this budget form will not reflect in the budget you created within the proposal. It is recommended that you make changes to the budget within the proposal, and then update this budget form by clicking the **Reload Form Data** at the top of the page. This will ensure both budgets have the current information.*

Errors/Warnings

- If a tab within the budget form has errors, it will be highlighted in yellow, as the summary tab does in the screenshot above. When you navigate to the tab containing errors, at the top of the budget form, a list of those errors will display.

- Any errors within the form will populate at the top of the tab currently open. You can expand the errors by clicking on the icon next to the warning text. This will expand a list of warnings/errors. You can click the link for any warning to be taken directly to the field within the budget form to correct the issue. When you are finished, be sure to click the **Save Form** button at the top of the page.

Document Attachments

- Also within the budget form you can upload any necessary attachments. The attachment fields will look similar to the ones shown in the screenshot below.

- You can upload a document by clicking on the **Add Attachment** button next to the appropriate field.

- A small popup window will open, allowing you to **Choose File** from your local file directory. Once you locate your file, you will return to this window. Click the **Save Selected File** button to continue uploading the file or you choose **Cancel** to return to the budget form.
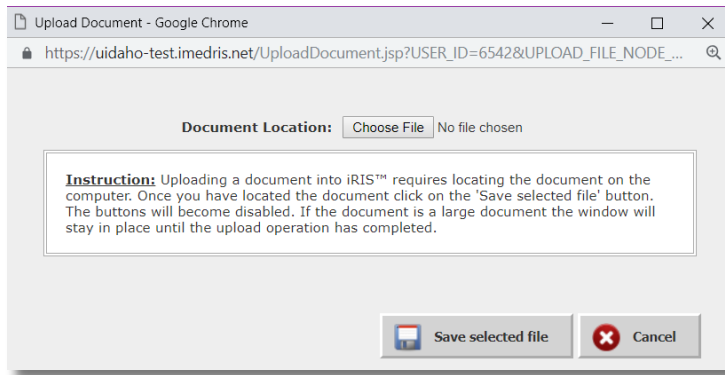
- Your file may take several moments to upload to the system, depending on the file size. The budget form screen will grey out while the upload is taking place and you will see the following message on your screen.
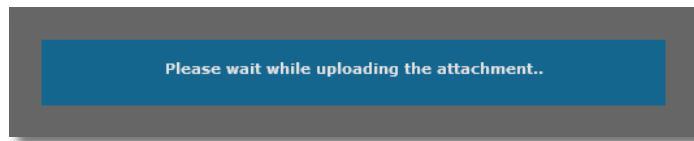
- Once the upload is complete, the page will return to normal and the attachment field will list the uploaded file. If the file you uploaded was a Word document or an .rtf, the system will convert the attachment to a .PDF, as required by Grants.gov submissions.
- You may review your uploaded document by clicking on the **View Attachment** button. This will open the document in a separate window.
- You can remove your attachment from the budget form by clicking on the **Delete Attachment** button.

Summary Tab / Mark Complete

- After any changes to the budget have been completed, click the **Mark Complete** button at the top of the page so that the system will flag this form as ready to be submitted with the rest of the package to the sponsor. You are still able to make modifications to the budget form, if necessary. You will need to mark the budget form as complete again after making any changes.

- When you return to the list of items within the Grant Opportunity, the budget form will be flagged as complete, as shown in the image below.

- After you have completed each required and desired optional forms, select the back button twice to return to your application, or click on **application** in the file path at the top of your screen:

Non Grants.gov Proposal Documents

This question will only appear if you selected 'No' to the Grants.gov opportunity/submission question in section 5.0, Proposal Guidelines & Basic Submission Information.

- Upload all required proposal documents for submission to sponsor:
    o   Project narrative
    o   Scope of work
    o   Other forms as required by the solicitation

10.0 Non Grants.gov Proposal Documents

10.1 Upload all required proposal documents (e.g., project narrative, scope of work, other sponsor forms) here:

Attach as many additional documents as needed.

Select or Revise Existing	Add a New Document	Add Multiple Documents

Detach	Version	Title	Category	Last Modified	Last Modified By	Checked Out By	View File

No Document(s) have been attached to this form.

Pro Tips and Tricks

Return to Application from the Budget

To return to your application form from within the budget section, select the back button a few times or select 'application' from the Path information found under the system user information: