



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.

The screenshot displays the VERAS user interface. At the top left is the University of Idaho logo. To its right, a user profile section shows the name 'Jennifer K Meekhof' and the last login time '04-12-2019 06:36'. A 'Help' button with a question mark icon is highlighted with a red box. Further right are 'My Profile' and 'Log out' buttons. Below the header is a 'My Workspaces' dropdown menu currently set to 'Project Assistant'. The main content area is a grid of menu items organized into categories:

- Award Forms**
 - Index Request Form
 - Preliminary (Early) Setup Form
- Board Member Tasks**
 - IACUC Board Member Manual
 - IACUC Board Member Submissions Manual
 - IACUC Reviewer Training Manual
- Budgets**
 - NIFA Rate Comparison Budget
 - Simple Budget Template
- Conflict of Interest**
 - Quick Guide to COI Reporting
 - COI Detailed Instruction Set
 - Annual vs Project vs Revision - COI
- Cost Transfers, Effort Reporting and Other Guidance**
 - Budget and Cost Transfer Calculator for Grants
 - Fly America Act Waiver
 - Grant e-code Lookup Tool
 - OSP Payroll Cost Transfer Form
 - Sample OSP Payroll Cost Transfer Form
- Getting Started and Basics**
 - How to Print Documents
 - Introduction to My Assistant and Study Assistant
 - Uploading and Editing Biosketch/CV/Pub
 - VERAS Quick Tips
- How Tos/Quick Tips**
 - How to address a stipulation - PI
 - How to start a protocol application, amendment, or continuing review form
- IACUC Submissions**
 - IACUC Protocol VERAS Quick Guide
 - Collaboration Agreement - Institutional
 - Collaboration Agreement - Non-Research
 - Collaboration Agreement - Private Owned Animals
 - Collaboration Agreement - Private Owners Animal and Land
 - Collaboration Agreement - Wildlife/Private Land
- IRB Submissions**
 - IRB Protocol Submission Guide
 - PI How To - IRB Amendment Request Form
 - IRB Reviewer Manual
- Proposal Forms**
 - F&A Waiver Request
 - Subrecipient Commitment Form - BSU, ISU, NNU, OSU, and WSU version
 - Subrecipient Commitment Form - standard version
 - Voluntary Committed Cost Share Request Form
- Subaward Forms**
 - Instructions for Subawardee
 - Subaward & Amendment Request Instructions
 - Subaward Amendment Request
 - Subaward Attachment 3A
 - Subaward Attachment 3B
 - Subaward Attachment 3B Pg 2
 - Subaward Checklist for UI PI
 - Subaward Request Form
- VERAS Manuals**
 - Budget Preparation Guide
 - Proposal Assistant User's Guide

The 'VERAS Manuals' section and its items are highlighted with a red box. The 'Proposal Assistant User's Guide' item is highlighted with a yellow background.

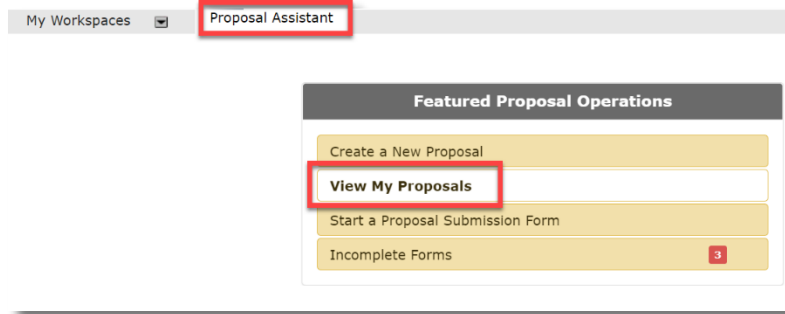
If you have questions that are not addressed in this guide, please contact osp-web@uidaho.edu or call 208-885-6651.

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:

All Proposals								Recently Used	Project Status	Search for Proposal/Award Number, Title	Search	⚙
All		Draft		Pre-award		6 result(s) found... 1 - 6						
Click to open	Proposal Status	Review Board	Proposal Number	Sponsor Due	Proposal Title	Principal Investigator	Actions					
			Award Number	Grant Office Due	Short Title							
	Draft	<Not Assigned>	19077	04/01/2019	VERAS training proposal application	Smith, Alistair	History Forms Hide Copy Delete					
	Draft	<Not Assigned>	19074	04/01/2019	Last draft of proposal application before Go-Live!	Smith, Alistair	History Forms Hide Copy Delete					

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

Section view of Application

- 1.0 General Information
- 2.0 Project Access and Assignments
- 3.0 Setup Department(s) Access
- 4.0 Proposal Branching
- 5.0 Proposal Guidelines & Basic Submission Information
- 6.0 Sponsoring Entities
- 7.0 Project Information
- 8.0 Subrecipients/Service Agreements/Consultants
- 9.0 UI Budget and Budget Narrative/Justification**
- 10.0 Grants.gov Submissions - Select or download opportunity pack ...
- 11.0 Research Compliance
- 12.0 Other

Entire view of the Application

9.0 UI Budget and Budget Narrative/Justification

9.1 Section Requirements and Notes:

- To Be Determined personnel may be a
- ALL applications must include a some
- All Grants.gov submissions should us
- Cost share/match information, if requ
- If your funding is going to be separat

9.2 * Please add a budget below. Note that informat

If this is your first time using VERAS for a propo

By selecting "Add a New Budget" below you v

- Choose 'detailed budget' to enter all budget
- Choose 'modular budget' if this is the forma
- Choose 'basic budget' if you will be attaching

More information on budget creation is in the help tip

+ Add a New Budget

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 enter 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. <i>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.</i>
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.

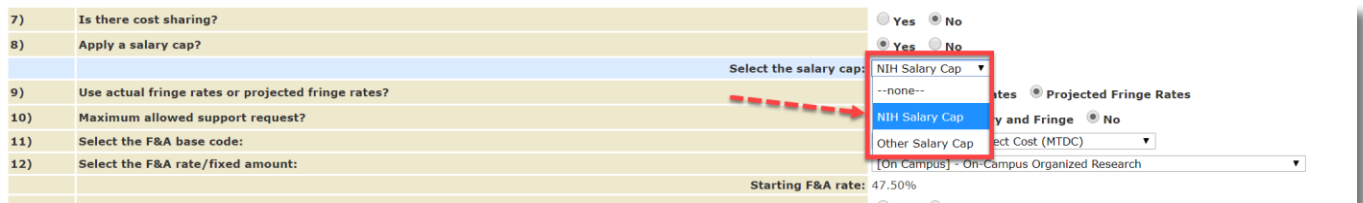
*Will not be available until the budget setup page is saved

- 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:

Budget Setup		Budget Details						
BP1	BP2	BP3	Summary					
Start Date:	04/07/2014	Salary Cap: \$179,700.00		All Periods	Total Direct Costs: \$239,382.00 Total Indirect: \$181,185.00 Total: \$420,567.00			
End Date:	04/06/2015			Period 1	Total Direct Costs: \$239,382.00 Total Indirect: \$181,185.00 Total: \$420,567.00			
A. Senior Key Personnel								
Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt
Susan Investigator Role: Principal Investigator	\$200,000.00	\$179,700.00	100.00%	0.00	--none--	\$0.00	--none--	\$0.00

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:

Budget Help

Download Refresh Salary Indirect Cost Details Clear Budget Period Data Calculate and Save Changes

Budget Setup Budget Details

BP1 Summary

Start Date: 04/01/2019 End Date: 03/31/2020

All Periods Total Direct Costs: \$44,276.00 Total Indirect: \$21,031.00 Total: \$65,307.00
 Period 1 Total Direct Costs: \$44,276.00 Total Indirect: \$21,031.00 Total: \$65,307.00

+ Add Institutional Personnel + Add To Be Determined Personnel

	Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate1	Month App. Esc Rate2	Req Salary	Fringe	Fringe Amt	Totals		
	Alistair Smith Role: Principal Investigator	\$0.00	\$175,000.00	10.00%	1.20	--none--	--none--	\$17,500.00	Faculty (academic year and summer)	\$4,638.00	\$22,138.00		
	Erik Coats Role: Co-Principal Investigator	\$0.00	\$175,000.00	10.00%	1.20	--none--	--none--	\$17,500.00	Faculty (academic year and summer)	\$4,638.00	\$22,138.00		
A. Senior Key Personnel								Total Wages:	\$35,000.00	Total Fringe:	\$9,276.00	Total:	\$44,276.00

Fringe amounts will show when Calculate and Save Changes is selected

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.

Budget Setup Detailed Budget

BUDGET STATUS: Draft
Version: 1.0

- Descriptive title for this Budget version: New budget
- Select the budget format: Detailed Budget
- What is the budget action? New
- Do you want to use an Academic Calendar? Yes No
- Number of Budget Periods? 3
 Period 1: Start Date 05/22/2014 End Date 05/21/2015
 Period 2: Start Date 05/22/2015 End Date 05/21/2016
 Period 3: Start Date 05/22/2016 End Date 05/21/2017
- Is there cost sharing? Yes No
- Apply a salary cap? Yes No
 Select the salary cap: \$179,700 - FY2012 NIH Salary Cap 12/23/11-Forward
- Use actual fringe rates or projected fringe rates? Actual Fringe Rates Projected Fringe Rates
- Maximum allowed support request? Salary Salary and Fringe No
 Enter the maximum support request: \$ 150,000.00
- Select the F&A base code: A - Modified Total Direct Cost (MTDC)
- Select the F&A rate/fixed amount: [On Campus] - Sponsored Research

- 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.

Budget Setup Budget Details

BP1 BP2 BP3 Summary

Start Date: 05/22/2014 End Date: 05/21/2015 Salary Cap: \$179,700.00

All Periods Total Direct Costs: \$334,500.00 Total Indirect: \$107,096.00 Total: \$441,596.00
 Period 1 Total Direct Costs: \$184,500.00 Total Indirect: \$107,096.00 Total: \$291,596.00
 Cost Sharing Voluntary Committed: \$0.00 Mandatory: \$0.00 Total: \$0.00

+ Add Institutional Personnel + Add To Be Determined Personnel

	Name/Role	Apply Maximum	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate1	Month App. Esc Rate2	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals
	Susan Investigator Role: Principal Investigator	<input checked="" type="checkbox"/>	\$0.00	\$175,000.00	100.00%	12.00	Jun 2014	--none--	\$150,000.00	Academic Personnel	\$34,500.00		\$184,500.00
	To Be Determined		\$0.00		0.00%				\$0.00		\$0.00		\$0.00

- 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.

Budget Setup		Budget Details	
BP1	BP2	BP3	Summary
Start Date: 05/22/2014			
End Date: 05/21/2015 Salary Cap: \$179,700.00			
All Periods		Total Direct Costs: \$300,000.00	Total Indirect: \$87,070.00
Period 1		Total Direct Costs: \$150,000.00	Total Indirect: \$87,070.00
Cost Sharing		Voluntary Committed: \$0.00	Mandatory: \$0.00
		Total: \$0.00	Total: \$0.00

A. Senior Key Personnel													
	Name/Role	Apply Maximum	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate1	Month App. Esc Rate2	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals
+	Susan Investigator Role: Principal Investigator	<input checked="" type="checkbox"/>	\$0.00	\$175,000.00	100.00%	12.00	Jun 2014	--none--	\$121,951.00	Academic Personnel	\$28,049.00		\$150,000.00
+	To Be Determined Role: Co-Principal Investigator	<input type="checkbox"/>	\$0.00	\$0.00	0.00%	0.00	--none--	--none--	\$0.00	--none--	\$0.00		\$0.00

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.

Budget Setup		Detailed Budget	
1)	Descriptive title for this Budget version:	Detailed Modular	
		Created from budget version: None	
2)	Select the budget format:	<div style="border: 1px solid red; padding: 2px;"> Detailed Modular Budget Detailed Budget Detailed Modular Budget Basic Budget </div>	
3)	What is the budget action?		
4)	Number of Budget Periods?		

- 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:

Budget Setup		Modular Budget	
1)	Descriptive title for this Budget version:	Fresh Start Modular Budget	
		Created from budget version: None	
2)	Select the budget format:	<div style="border: 1px solid red; padding: 2px;"> Modular Budget </div>	

- 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.

- **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
- **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
- **Calculate and Save Changes** - At any point of populating the budget you can save the changes to your budget and calculate budget totals

Budget Help Download Refresh Salary Indirect Cost Details Clear Budget Period Data Calculate and Save Changes

Budget Setup **Budget Details**

BP1 BP2 BP3 Summary

Start Date: 03/18/2014 End Date: 03/17/2015

All Periods	Total Direct Costs: \$0.00	Total Indirect: \$0.00	Total: \$0.00
Period 1	Total Direct Costs: \$0.00	Total Indirect: \$0.00	Total: \$0.00
Cost Sharing	Voluntary Committed: \$0.00	Mandatory: \$0.00	Total: \$0.00

- 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.
 - For example, in section A. Senior Key Personnel you can click on the icon to expand this section to a full page

Budget Setup **Budget Details**

BP1 BP2 BP3 Summary

Start Date: 03/18/2014 End Date: 03/17/2015

All Periods	Total Direct Costs: \$0.00	Total Indirect: \$0.00	Total: \$0.00
Period 1	Total Direct Costs: \$0.00	Total Indirect: \$0.00	Total: \$0.00
Cost Sharing	Voluntary Committed: \$0.00	Mandatory: \$0.00	Total: \$0.00

A. Senior Key Personnel Add To Be Determined Personnel

Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals	
A. Senior Key Personnel						Total Wages:	\$0.00	Total Fringe:	\$0.00	Total:	\$0.00


- 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.

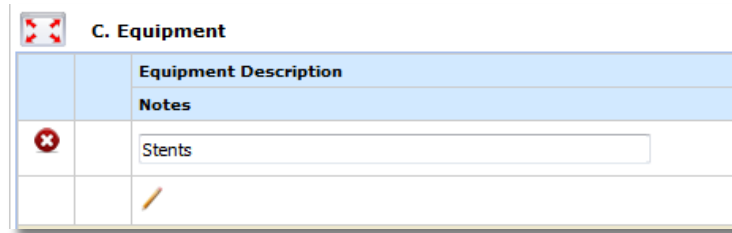
A. Senior Key Personnel
Period 1
Start Date: 03/18/2014 - End Date: 03/17/2015

Return to full screen Add To Be Determined Personnel Calculate and Save Changes

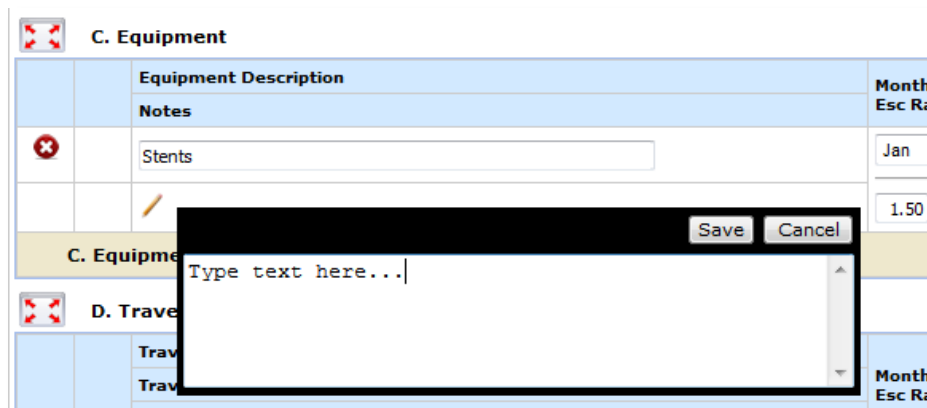
Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals	
A. Senior Key Personnel						Total Wages:	\$0.00	Total Fringe:	\$0.00	Total:	\$0.00

Notes

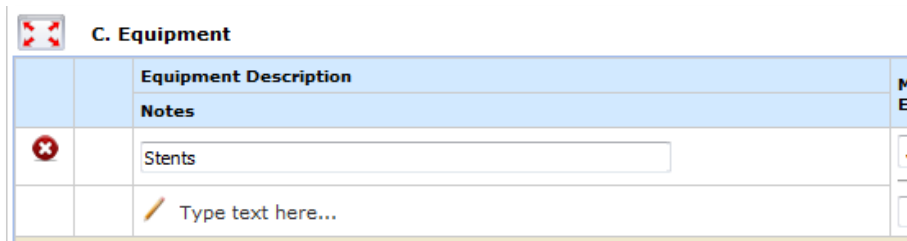
- Each line item in the budget has an area designated for any notes that need to be included. To access the note, click the  icon.



- 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.
 - 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.

Project Short Title: R01
 Proposal Number: P0002226
 PI: Investigator, Susan M.

R01 - Project Budget Add Personnel

Project Personnel Pool

User Search

Name	Role
Susan Investigator	Principal Investigator
Additional Investigator	Co-Principal Investigator
Mary Coordinator	Clinical Research Associate
John Assistant	Research Assistant
Other Admin Personnel	Add'l Principal Investigator
Jan Administrator	Primary Research Administrator

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

Project Role Details:

Please input details for the selected Personnel to be added to the budget.

Personnel: Susan Investigator

*Role on Project: Principal Investigator

*Personnel Category: Senior/Key Personnel

Save

- 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.

List of Selected Personnel to be added to the Budget

Save Order

Senior/Key Personnel

Delete	Edit	Order	Name	Role
		1	Susan Investigator	Principal Investigator

Non-Key Personnel

Delete	Edit	Order	Name	Role
No Other Personnel have been added to the budget				

Other Significant Contributor

Delete	Edit	Order	Name	Role
No Other Contributing Personnel have been added to the budget				

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

List of Selected Personnel to be added to the Budget Save Order

Senior/Key Personnel

Delete	Edit	Order	Name	Role
		1	Susan Investigator	Principal Investigator
		2	Other Admin Personnel	Add'l Principal Investigator
		3	Additional Investigator	Co-Investigator

Non-Key Personnel

Delete	Edit	Order	Name	Role
		1	Mary Jane Coordinator	Clinical Research Associate
		2	John Assistant	Research Assistant
		3	Jan Administrator	Primary Research Administrator

- **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.

Project Short Title: S2S
 Proposal Number: P2393
 PI: Investigator, Susan M.

S2S - Project Budget Add Personnel Back

Last Name: First Name:
 by Department: All Departments

Select	Name	Department	Email
Your search criteria returned 0 results.			

- 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>

S2S - Project Budget Add Personnel

Last Name: user First Name:
 by Department: All Departments

Select	Name	Department	Email
	User, George	Cardiology	
	User, Sarah	Cardiology	suser@imedris.com

- 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.

Please input details for the selected user.

Personnel: Consultant
Co-Investigator
Programmer (research staff)
Analyst
Project Assistant
Secretarial/Clerical
Associate Research Services Coordinator

***Role on Project:** Other
Nurse
Other
Other Professional

***Personnel Category:**

Save

- 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.

List of Selected Personnel to be added to the Budget Save Order

Senior/Key Personnel

Delete	Edit	Order	Name	Role
		1	Susan Investigator	Principal Investigator

Non-Key Personnel


Delete	Edit	Order	Name	Role
No Other Personnel have been added to the budget				

Other Significant Contributor

Delete	Edit	Order	Name	Role
		1	George User	Other Significant Contributor

- 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.

A. Senior Key Personnel Add Institutional Personnel Add To Be Determined Personnel											
	Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals
	Susan Investigator Role: Principal Investigator	\$120,000.00	\$ 120,000.00	0.00 %	0.00	--none-- 0.00 %	\$0.00	--none-- 0.00%	\$0.00		\$0.00
A. Senior Key Personnel							Total Wages:	\$0.00	Total Fringe:	\$0.00	Total: \$0.00
B. Other Personnel											
	Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals
	Mary Coordinator Role: Clinical Research Associate	\$55,000.00	\$ 55,000.00	0.00 %	0.00	--none-- 0.00 %	\$0.00	--none-- 0.00%	\$0.00		\$0.00
B. Other Personnel							Total Wages:	\$0.00	Total Fringe:	\$0.00	Total: \$0.00
All Personnel Totals							Total Wages:	\$0.00	Total Fringe:	\$0.00	Total: \$0.00

- 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.

Project Short Title: R01
 Proposal Number: P0002226
 PI: Investigator, Susan M.

R01 - Project Budget Add To Be Determined Personnel

Personnel - To Be Determined	Project Roles
	 Co-Principal Investigator
	 Faculty Advisor/Mentor
	 Clinical Research Associate
	 Biostatistician
	 Data Manager
	 Technician
	 Research Assistant
	 Contact
	 Add'l Principal Investigator


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

Project Role Details:


Please input details for the selected Personnel to be added to the budget.

*Role on Project: Co-Principal Investigator



*Personnel Category: Senior/Key Personnel



- 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.

List of Selected To Be Determined Personnel to be added to the Budget 

Senior/Key Personnel

Delete	Edit	Order	Name	Role
		1	To Be Determined	Co-Principal Investigator

Non-Key Personnel

Delete	Edit	Order	Name	Role
No Other Personnel have been added to the budget				

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

A. Senior Key Personnel						
	Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate
	Susan Investigator Role: Principal Investigator	\$120,000.00	\$ 120,000.00	0.00 %	0.00	--none-- 0.00 %
	To Be Determined Role: Co-Principal Investigator	\$0.00	\$ 0.00	0.00 %	0.00	--none-- 0.00 %

- 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.

A. Senior Key Personnel							+ Add Ins			
	Name/Role	Apply Maximum	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate1	Month App. Esc Rate2	Req Salary	Fringe
	Susan Investigator Role: Principal Investigator	<input checked="" type="checkbox"/>	\$0.00	\$ 175,000.00	100.00 %	12.00	--none-- 0.00 %	--none-- 0.00 %	\$121,951.00	Acc 23.0

- **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.

- **Fringe Amount** - This field will display the total fringe amount for the user based on the percentage selected in the previous column.
- **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.

Project Short Title: R01
 Proposal Number: P0002226
 PI: Investigator, Susan M.

R01 - Project Budget Back

C&G Budget Help Download Refresh Salary Indirect Cost Details Clear Budget Period Data Calculate and Save Changes

Budget Setup		Budget Details			
BP1	BP2	BP3	Summary		
Start Date:	04/07/2014	All Periods	Total Direct Costs: \$312,801.00	Total Indirect: \$181,185.00	Total: \$493,986.00
End Date:	04/06/2015	Period 1	Total Direct Costs: \$312,801.00	Total Indirect: \$181,185.00	Total: \$493,986.00

A. Senior Key Personnel Add Institutional Personnel Add To Be Determined Personnel

Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Totals
Susan Investigator Role: Principal Investigator	\$120,000.00	\$ 120,000.00	45.00 %	5.40	Feb	\$54,284.00	Academic Personnel 35.25%	\$19,135.00	\$73,419.00
To Be Determined Role: Co-Principal Investigator	\$0.00	\$ 85,000.00	15.00 %	1.80	--none--	\$12,750.00	Academic Personnel 35.25%	\$4,494.00	\$17,244.00
A. Senior Key Personnel						Total Wages: \$67,034.00	Total Fringe: \$23,629.00	Total: \$90,663.00	

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

B. Other Personnel

Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Totals
Mary Coordinator Role: Clinical Research Associate	\$55,000.00	\$ 55,000.00	50.00 %	6.00	Jun	\$28,201.00	Staff Personnel - Career 43.92%	\$12,386.00	\$40,587.00
John Assistant Role: Research Assistant	\$98,600.00	\$ 98,600.00	80.00 %	9.60	May	\$81,091.00	Staff Personnel - Career 43.92%	\$35,615.00	\$116,706.00
Jan Administrator Role: Primary Research Administrator	\$98,600.00	\$ 98,600.00	45.00 %	5.40	Oct	\$45,056.00	Staff Personnel - Career 43.92%	\$19,789.00	\$64,845.00
B. Other Personnel						Total Wages: \$154,348.00	Total Fringe: \$67,790.00	Total: \$222,138.00	
All Personnel Totals						Total Wages: \$221,382.00	Total Fringe: \$91,419.00	Total: \$312,801.00	

C. Equipment

Note: please limit to capital equipment items \geq \$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.

C. Equipment					+ Add Equipment
Equipment Description	Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Totals
C. Equipment					Total: \$0.00

- 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.

C. Equipment						+ Add Equipment
Equipment Description	Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Cost Sharing Totals	Totals
Equipment #1		--none--	\$ 6,000.00	1.00		\$6,000.00
						0.00%
C. Equipment						Total: \$6,000.00


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.

D. Travel						+ Add Travel
Travel Category	Travel Description	Month App. Esc Rate	Unit Price	Unit Quantity	Totals	
Domestic Travel Costs		--none--	\$ 1,500.00	6.00		\$9,000.00
	On Site Training					0.00%
Foreign Travel Costs		--none--	\$ 6,000.00	2.00		\$12,000.00
	International Training Seminar					0.00%

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 Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Totals	
	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: <input type="text"/>	--none--	\$ 0.00	0.00	\$0.00	
		0.00 %				
	Number of Participants/Trainees: <input type="text" value="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 Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Totals	
	<input type="text" value="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.

4. ADP /Computer Services						+ Add ADP /Computer Services
Description	Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Months	Totals
Other	Enter Description: []	--none--	\$ 0.00	1.00		\$0.00
4. ADP /Computer Services						Total: \$0.00

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.

5. Subawards / Consortium/Contractual Costs						+ Add Subawards /Consortium/Contractual Costs
Description	Notes	Direct Costs	Indirect Costs	Amt Allocated to IDC Base	Totals	
American Red Cross -Northern Region	Sister Campus? <input type="checkbox"/>	\$ 25,000.00	\$ 10,000.00	\$25,000.00	\$35,000.00	
5. Subawards /Consortium/Contractual Costs		Total Direct: \$25,000.00	Total Indirect: \$10,000.00	Total Alloc to IDC Base: \$25,000.00	Total: \$35,000.00	

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

6. Equipment or Facility Rental/User Fees						+ Add Equipment or Facility Rental/User Fees
Description	Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Totals	
Equipment Rental		--none--	\$ 500.00	1.00	\$500.00	
6. Equipment or Facility Rental/User Fees						Total: \$500.00

Other Direct Costs

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

8. Other Direct Costs							+ Add Other Direct Costs
Description	Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Other Multiplier/ Months	Totals	
--none--		--none--	\$ 0.00	1.00	1	\$0.00	
8. Other Direct Costs							Total: \$0.00

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.

8. Tuition/Fee Remission						+ Add Tuition/Fee Remission
Description	Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Other Multiplier/ Months	Totals
Tuition/Fee Remission		--none--	\$ 0.00	1.00	1	\$0.00
		0.00%				
8. Tuition/Fee Remission						Total: \$0.00

- 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).

Project Short Title: R01				R01 - Project Budget				Back		
Proposal Number: P0002226										
PI: Investigator, Susan M.										
C&G Budget Help				Download	Refresh Salary	Indirect Cost Details	Clear Budget Period Data	Calculate and Save Changes		
Budget Setup		Budget Details								
BP1	BP2	BP3	Summary							
Start Date: 04/07/2014				All Periods		Total Direct Costs: \$476,490.00		Total Indirect: \$260,789.00		Total: \$737,279.00
End Date: 04/06/2015				Period 1		Total Direct Costs: \$476,490.00		Total Indirect: \$260,789.00		Total: \$737,279.00
				0.00%						
10. Tuition/Fee Remission								Total:		\$750.00
F. Section Total								Total:		\$50,300.00
G. Direct Costs								Total Direct Costs (A thru F)		\$476,490.00

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.

H. Indirect Costs						
Indirect Cost Category	Description	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
	Notes					

- 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
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Personnel from A& B	\$257,689.00	\$103,992.00	\$361,681.00

D. Travel			
Include	Travel Category	Travel Description	Totals
<input checked="" type="checkbox"/>	Domestic Travel Costs	On Site Training	\$9,000.00
<input checked="" type="checkbox"/>	Foreign Travel Costs	International Training Seminar	\$12,000.00

E. Participant Trainee Support Costs		
Include	Trainee Category.	Totals
<input checked="" type="checkbox"/>	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?	<input checked="" type="radio"/> Actual Fringe Rates <input type="radio"/> 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?	<input checked="" type="radio"/> Yes <input type="radio"/> 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	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
------------------------------------	--

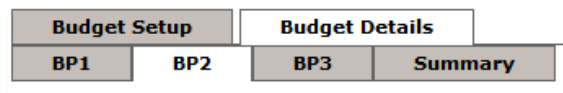
J. Fees

DO NOT USE

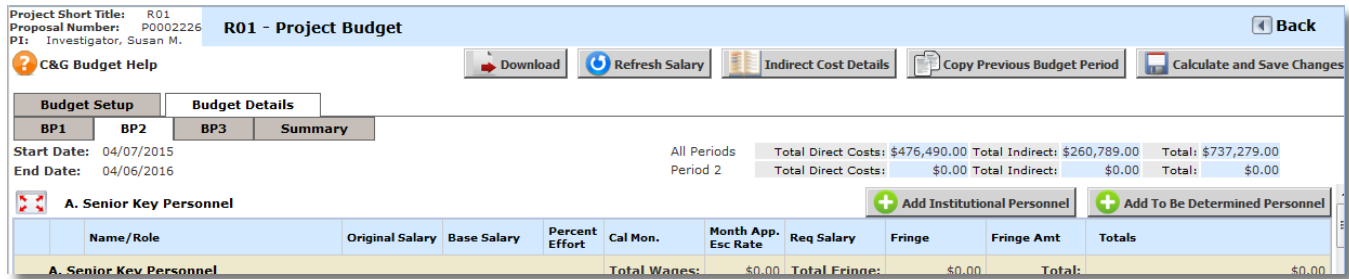
Budget Periods

- 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

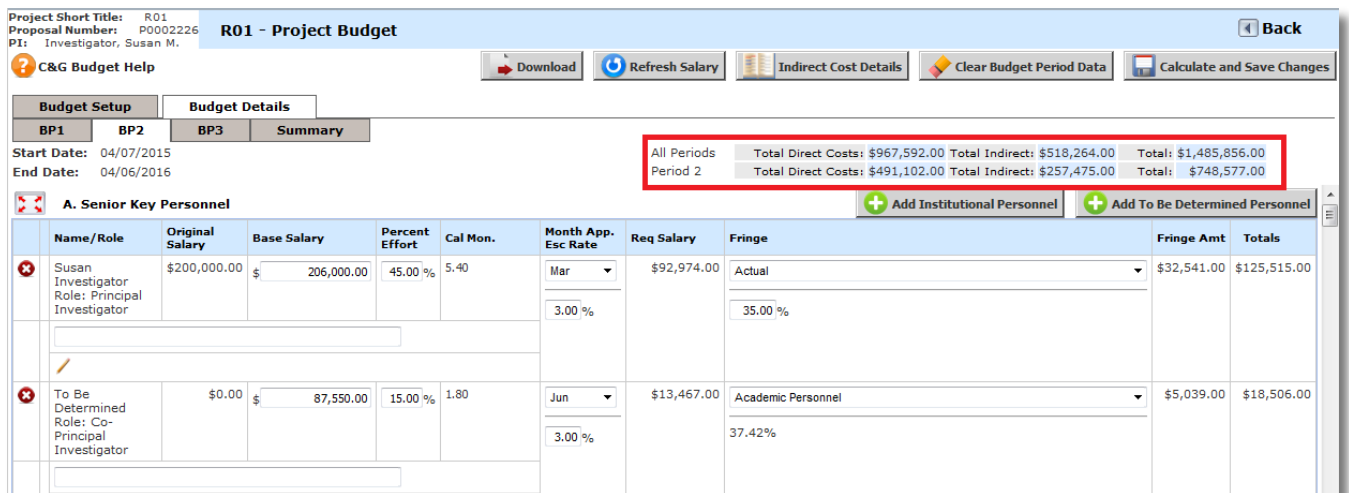
budget period to be setup. If the selected Budget Action was Renewal the budget periods data will copy from the prior budget period, allowing you modifications as necessary.



- 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.

Summary

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

Project Short Title: R01
 Proposal Number: P0002226
 PI: Investigator, Susan M.

R01 - Project Budget Back

C&G Budget Help Download

Budget Setup		Budget Details			Summary		
BP1	BP2	BP3	Select the Summary View: Detailed Summary				
Start Date: 04/07/2014		All Periods			Total Direct Costs: \$1,473,864.00	Total Indirect: \$929,971.00	Total: \$2,403,835.00
End Date: 04/06/2017		Cost Sharing			Voluntary Committed: \$0.00	Mandatory: \$0.00	Total: \$0.00
Funds Requested	BP 1	BP 2	BP 3	SubTotal	Total		
A. & B. Personnel							
A. Senior Key Personnel	\$361,681.00	\$376,259.00	\$391,395.00		\$1,129,335.00		
B. Other Personnel	\$139,543.00	\$144,021.00	\$148,642.00	\$432,206.00			
Total Number of Other Personnel: 9	\$222,138.00	\$232,238.00	\$242,753.00	\$697,129.00			
C. Equipment	\$2,259.00	\$2,293.00	\$2,327.00		\$6,879.00		
D. Travel	\$21,000.00	\$21,000.00	\$21,000.00		\$63,000.00		
Domestic Travel Costs	\$9,000.00	\$9,000.00	\$9,000.00	\$27,000.00			
Foreign Travel Costs	\$12,000.00	\$12,000.00	\$12,000.00	\$36,000.00			
E. Participant Trainee Support Costs	\$41,250.00	\$41,250.00	\$41,250.00		\$123,750.00		
Tuition and Fees	\$2,500.00	\$2,500.00	\$2,500.00	\$7,500.00			

- 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.

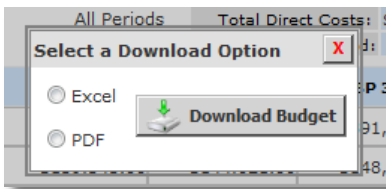
Summary Select the Summary View: PHS 398 Modular Budget

All Periods Total Direct Costs: \$671,533.00 Total Indirect: \$256,648.00 Total: \$928,181.00

WARNING: One or more budget periods has exceeded the maximum allowable of \$250,000 per period. To be eligible to submit a PHS 398 Modular Budget to NIH, you will need to reduce direct costs.

	BP 1	BP 2	BP 3	Cumulative
Start Date:	04/21/2014	04/21/2015	04/21/2016	04/21/2014
End Date:	04/20/2015	04/20/2016	04/20/2017	04/20/2017
A. Direct Costs				
Direct Costs less Consortium F&A	\$369,324.00	\$150,000.00	\$150,000.00	\$669,324.00
Consortium F&A	\$0.00	\$0.00	\$0.00	\$0.00
Total Direct Costs	\$369,324.00	\$150,000.00	\$150,000.00	\$669,324.00

- 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**.

Project Short Title: R01
 Proposal Number: P0002241
 PI: Investigator, Susan M.

R01 - Project Budget Back

Save Changes To Budget Setup

Budget Setup **Basic Budget**

BUDGET STATUS: Draft
Version: 0.0

1) Descriptive title for this Budget version:	Basic Budget
Created from budget version:	None
2) Select the budget format:	Basic Budget
3) What is the budget action?	New

- 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.

C&G Budget Help Download Budget Calculate and Save Changes

Budget Setup **Basic Budget**

	BP1	BP2	BP3	Summary
Start Date	04/18/2014	04/18/2015	04/18/2016	04/18/2014
End Date	04/17/2015	04/17/2016	04/17/2017	04/17/2017
PI Effort Committed (%)	0.00%	0.00%	0.00%	0.00%
PI Salary Request (%)	0.00%	0.00%	0.00%	0.00%
Direct	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Indirect	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

- Start Date** – The budget period starting date will populate in this column. This information comes from the Budget Setup tab.
- End Date** – The budget period ending date will populate in this column. This information comes from the Budget Setup tab.
- 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.
- 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.

Budget Setup **Basic Budget**

	BP1	BP2	BP3	Summary
Start Date	04/18/2014	04/18/2015	04/18/2016	04/18/2014
End Date	04/17/2015	04/17/2016	04/17/2017	04/17/2017
PI Effort Committed (%)	45.00%	55.00%	60.00%	53.33%
PI Salary Request (%)	100.00%	100.00%	100.00%	100.00%

- 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 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
- **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”.

Attach	Delete	View Details	Open/Edit	Budget Title	Version	Budget Type / Budget Action	Status	Last Modified By	Date Last Modified	Create Revision
				R01 Budget	1.0	Detailed Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:15:10 AM PDT	
				New Budget	2.0	Detailed Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:15:10 AM PDT	
				Detailed Modular	3.0	Detailed Modular Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:20:34 AM PDT	
				Basic Budget	4.0	Basic Budget / New	Draft	Investigator, Susan M.	04/21/2014 4:10:53 PM PDT	

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

Select Budget:

Attach	Delete	View Details	Open/Edit	Budget Title	Version	Budget Type / Budget Action	Status	Last Modified By	Date Last Modified	Create Revision
				R01 Budget	1.0	Detailed Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:15:10 AM PDT	
				New Budget	2.0	Detailed Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:15:10 AM PDT	
				Detailed Modular	3.0	Detailed Modular Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:20:34 AM PDT	

Start Date:	04/21/2014
End Date:	04/20/2017
Categories	SubTotal Total
A. & B. Personnel	
	\$366,551.00
A. Senior Key Personnel	\$289,364.00
B. Other Personnel	\$77,187.00
Total Number of Other Personnel: 3	
C. Equipment	\$304,982.00
D. Travel	\$0.00
E. Participant Trainee Support Costs	\$0.00
Number of Participants/Trainees: 0	

- 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.

Add Personnel from Budget to Project Research Personnel:

Name	Role	Personnel Category	Include In	Attachments
Mary Coordinator	Clinical Research Associate	Non-Key Personnel	<input checked="" type="checkbox"/> Budget <input type="checkbox"/> Forms	

- 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.

Budget

Budget

Add a New Budget
 Copy Budget from Other Project
 Select from Budget Project Pool

Detach	Edit	View Details	Budget Title	Version	Budget Type/ Budget Action	Last Modified By	Date Last Modified
			Detailed Modular	3.0	Detailed Modular Budget / New	Investigator, Susan M.	04/18/2014 11:20:34 AM PDT

- 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.

[Print Friendly](#) [Assign User\(s\) to Sections](#) [Save and Continue to Next Section](#)

Section view of Application

- 1.0 General Information
- 2.0 Project Access and Assignments
- 3.0 Setup Department(s) Access
- 4.0 Sponsor
- 5.0 Proposal Type
- 6.0 Submission Information
- 7.0 FOA and LOI
- 8.0 Compliance and Questions
- 9.0 CHR Studies
- 10.0 On Campus Performance Site
- 11.0 Performance Site(s)
- 12.0 Subrecipients
- 13.0 Budget
- 14.0 Standalone forms and project personnel

Entire view of the Application

Budget Attached: Version 3.0, Detailed Modular
[Save](#) [Edit Personnel Details](#) [Add Personnel](#)

Senior/Key Personnel

Remove	Order	Name	Role	Personnel Type/ Organization	Include In	Attachments
	1	Susan Investigator	Principal Investigator	Internal Institution Affiliation I	Budget Forms	Biosketch: Support:
✖	2	Additional Investigator	Co-Principal Investigator	Internal	Forms	Biosketch: Support:

Non-Key Personnel

Remove	Order	Name	Role	Personnel Type/ Organization	Include In	Attachments
✖	1	Jan Administrator	Primary Research Administrator	Internal Institution Affiliation I	Forms	
✖	2	Mary Coordinator	Clinical Research Associate	Internal	Budget Forms	

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

[Back](#) [Save Signoff](#)

Submission Routing Signoff Sheet

Project Title: Copy of Clinical Trials to Test the Effectiveness of Treatment, Preventive, and Services Interventions (R01)
Submission Reference Number: 002271

Proposal Information

P#: P0002241	Mentor:
PI/Fellow Name: Susan M. Investigator	
Type of Agreement: Grant	
Purpose: Research	
Administering Department(s): null - Cardiology	Department(s) providing space/resources: null - Cardiology
Performance Site: 123, , Redlands - grants1001/Test, CA: California, 92374, USA: UNITED STATES	

Institutional Review Due Date: 03/28/2014

Budget Information for the Entire Project Period

Start Date:	04/21/2014
End Date:	04/20/2017
Direct Cost:	\$669,324.00
Indirect Cost:	\$256,648.00
TOTAL:	\$925,972.00
PI Effort Committed:	45.00%
PI Salary Requested:	45.00%
Mandatory Cost Sharing:	\$0.00
Voluntary Cost Sharing:	\$0.00

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

Item(s)

Print Submission Component Name - Version

Sponsor Form(s)

G.g AT07 and NIH Ext-UAT Test FOA (T32) - PA-B1-T32 - (Version 1.0)

Internal Form(s)

Proposal Form - (Version 1.0) (Parent of the submission package)

Internal Form Attachments

Category : Funding Opportunity Announcement

Pending Opportunity Letter - (Version 1.0)

Internal Budget(s)

Detailed Modular - New - (Version 3.0)

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.

Budget Attached: Version 2.0, test detailed budget

Senior/Key Personnel

Remove	Order	Name	Role	Personnel Type/ Organization	Include In	Attachments
	1	Heather Nelson	Principal Investigator	Internal Regents of the University of Idaho	Budget Forms	Biosketch: Support:
<input type="button" value="X"/>	2	Steven Kirkham	Co-Principal Investigator	Internal Regents of the University of Idaho	Forms	Biosketch: Support:

Research Personnel Details:

Name	Role	Personnel Category	Include In	Attachments
Heather Nelson	Principal Investigator	Senior/Key Personnel	<input checked="" type="checkbox"/> Budget <input checked="" type="checkbox"/> Forms	Biosketch: <input type="text"/> <input type="button" value="Upload Attachment"/> Current/Pending Support: <input type="text"/> <input type="button" value="Upload Attachment"/>
Steven Kirkham	Co-Principal Investigator	Senior/Key Personnel	<input type="checkbox"/> Budget <input checked="" type="checkbox"/> Forms	Biosketch: <input type="text"/> <input type="button" value="Upload Attachment"/> Current/Pending Support: <input type="text"/> <input type="button" value="Upload Attachment"/>

- 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):

Budget Attached: Version 2.0, test detailed budget

Save Edit Personnel Details **+ Add Personnel**

Senior/Key Personnel

Remove	Order	Name	Role	Personnel Type/Organization	Include In	Attachments
	1	Heather Nelson	Principal Investigator	Internal Regents of the University of Idaho	Budget Forms	Biosketch: Support:
✖	2	Steven Kirkham	Co-Principal Investigator	Internal Regents of the University of Idaho	Forms	Biosketch: Support:

My Workspaces Project Assistant **Add Research Personnel to Project** Back

Project Short Title: April Fool
Proposal Number: 1003
PI: Nelson, Heather A

External Personnel

+ Add External Personnel to the project

Name	Organization	Phone Number	Email	Role
Joe Sub			joe.sub@university.edu	Co-Principal Investigator

Research Personnel Details:

Please input details for the selected Personnel to be added to the Project.

Personnel: Joe Sub

Role on Project: Co-Principal Investigator

Personnel Category: Senior/Key Personnel

Include In: Forms

Attachments

Biosketch: Upload Attachment

Current/Pending Support: Upload Attachment

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

Save

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**

[Print Friendly](#) [Save Section](#) [Save and Continue to Next Section](#)

Entire view of the Application

9.5 Cost Share

Are you planning to offer cost share with this proposal submission?

No
 Yes - Only as required by sponsor
 Yes - As required plus voluntary committed cost share
 Yes - Voluntary committed cost share only

What is the minimum dollar amount of cost share required by the sponsor?
Note: Keep in mind that any expense item used as cost share must be an allowable expense under the terms of the sponsor guidelines and occur within the project period.

19200

Cost Share by category:
 In the comments boxes please include enough detail for the departmental approver to ensure availability and allowability of the use of these expenses as cost share.

Category	Amount	Details	Departmental Approver
Salary/Temp Help	15000	Summer salary	Heather Nelson
Fringe	4200		Heather Nelson
Travel			
Other Expense			
Equipment			
Indirect Cost (F&A)			
Waived Overhead			
Tuition			
3rd Party		If more than one third party is providing cost share, enter the combined amount in the total column and provide details and amounts for each third party below:	
Total Cost Share:	19200.00		

If Third Party was included above, please upload a letter of support for each entity involved

[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.							

Note: Total Cost Share will calculate after the Save Section or Save and Continue to Next Section button is selected

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.

9.8 * Will your funding need to be split into multiple indexes (i.e. separate funding 'pots' by PI or department) if awarded?

Yes No

For each additional index needed, provide the preferred title, PI/co-PI who will have authority for spending, and responsible unit below:
A list of department codes is provided in the help link to the right. We plan to incorporate this into a dropdown list in a future enhancement.

Entry 1
Entry 2

+ Click here to add another entry
x Click Here to Delete this entry

Preferred index title:

PI/co-PI with spending authority:

Responsible unit (3 digit department code):

Complete this panel for each index requested. Each index request will have a separate tab

Select this to request additional indexes.

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.

10.0 Grants.gov Submissions - Select or download opportunity packet

10.1 Click on the button below to search for or select a Grants.gov opportunity.

Click here to attach a grant opportunity. ←

No grant opportunity has been associated.

Attach Application Package

+ Add a New Grant Opportunity

Attach	Delete	View Details	Change to FOA	Edit/View	Version	Opportunity Title	Opportunity Number	Package ID	CFDA	Competition ID	Opening Date	Closing Date	Sponsor Due Date	Tracking Number	Agency Tracking Number	Instructions
+	x				1.0	G.g. Training and NIH Ext-UAT FOA (R01-Clinical Trial Not Allowed)	PA-EN-R01	PKG00037257	93.865	FORMS-E	08/16/2017	08/16/2020				

If your application package appears here, select from this list, otherwise select **Add a New Grant Opportunity**

- To Add a New Grant Opportunity:

Search for Grant Opportunities

My Grant Opportunities Search Grant Opportunities

Active Opportunities Expired Opportunities

Details	Select	Closing Date	Opportunity Title	Agency	Funding Number
	+	2019-03-31 00:00:00.0	Test from HRSA - INT	Health Resources & Services Administration	HRSA-21-002
	+	2019-05-06 00:00:00.0	Test from HRSA - INT	Health Resources	HRSA-21-003
	+	2020-05-19 00:00:00.0	FY 2019 HQ Multi SF-270 AMUAT	Department of Homeland Security - FEMA	DHS-19-NPD-005-00-05
	+	2020-08-16 00:00:00.0	G.g. Training and NIH Ext-UAT FOA (R01-Clinical Trial Not Allowed)	National Institutes of Health	PA-EN-R01

Select an opportunity from this list or **Search Grant Opportunities**


- 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.

Attach Opportunity

Opportunities exist within your current project. If you want to copy form data from an existing opportunity to the new opportunity please choose one from the list below and select "Copy Data". Select "Do Not Copy Form Data" if you want to start the new opportunity without copied data.

Copy Data	Version	Funding Opportunity Number	CFDA Number	Competition ID	Submission Title	Status	Form Type
	1.0	PA-EN-R01	93.865	FORMS-E	This is the long title of my project to distinguish it from other proposals	Draft	

Project Short Title: R01
 Proposal Number: P0002241
 PI: Investigator, Susan M.

Project Application Back


Section view of Application




- 1.0 General Information
- 2.0 Project Access and Assignments
- 3.0 Setup Department(s) Access
- 4.0 Sponsor
- 5.0 Proposal Type
- 6.0 Submission Information
- 7.0 FOA and LOI
- 8.0 Compliance and Questions

Entire view of the Application

Grants.gov Submission

Grants.gov Submission Package

 [Click here to attach a grant opportunity.](#)

Detach	Edit/View	Version	Opportunity Title	Opportunity Number	CFDA	Competition ID	Opening Date	Closing Date	Sponsor Due Date	Tracking Number	Agency Tracking Number	Instructions
		1.0	G.g AT07 and NIH Ext-UAT Test FOA (R01)	PA-BB-R01	93.838	ADOBE-FORMS-B		10/05/2012	03/18/2014			

- 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.

Project Short Title: R01
 Proposal Number: P0002241
 PI: Investigator, Susan M.

Sponsor Forms

Back

Opportunity Number : PA-BB-R01
 NIH Activity Code : **NIH funding opportunity information currently unavailable. Until restored, eProposal is unable to trigger Activity Code specific Errors/Warnings.**

Refresh Package Print Package

Application Filing Name / Submission Title :

[Subscribe to Grants.gov notices based on funding opportunity num](#)

Validation Type: NIH

Open/Add	Delete	Form Name	Required/Optional	Errors / Warnings	Complete?
		PHS 398 Checklist V1.3	Required		
		PHS 398 Cover Page Supplement V1.4	Required		
		PHS 398 Research Plan V1.3	Required		
		Project/Performance Site Location(s) V1.3	Required		
		Research And Related Senior/Key Person Profile (Expanded) V1.2	Required		
		Research And Related Other Project Information V1.2	Required		
		Application For Federal Assistance SF 424 (R&R) V1.2	Required		
		PHS 398 Modular Budget V1.1	Optional		
		PHS Cover Letter V1.2	Optional		

- 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.

Project Short Title: R01
 Proposal Number: P2544
 PI: Investigator, Susan M.

Grants.gov Application Package

Back

PHS 398 Modular Budget V1.1

Reload Form Data Save Form

Budget Period 1 Budget Period 2 Budget Period 3 **Summary**

Delete Period Add Period

PHS 398 Modular Budget

Budget Period : 1

Start Date: 05/29/2014

End Date: 05/28/2015

A. Direct Costs

* Funds Requested (\$)

* Direct Cost less Consortium F&A 150,000

Consortium F&A 0.00

* Total Direct Costs 150000.00

B. Indirect Costs

Indirect Cost Type

Indirect Cost Type	Indirect Cost Rate (%)	Indirect Cost Base (\$)	* Funds Requested (\$)
1. Modified Total Direct Cost (MTDC)	57.00	13696.04	7807.00
2. Modified Total Direct Cost (MTDC)	58.00	133737.79	77568.00
3.			
4.			

Cognizant Agency (Agency Name, POC Name and Phone Number)
 DHHS, Joe Smith, 909-798-9100

Indirect Cost Rate Agreement Date 03/25/2012

Total Indirect Costs 85375.00

C. Total Direct and Indirect Costs (A + B)

Funds Requested (\$) 235375.00

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.

Project Short Title: R01
Proposal Number: P2544
PI: Investigator, Susan M.

Grants.gov Application Package Back

PHS 398 Modular Budget V1.1 Mark Complete Reload Form Data Save Form

Budget Period 1 | Budget Period 2 | Budget Period 3 | Summary

1 Warnings

1. [Warning - \[NIH\] PersonnelJustification](#) : In most cases, a Personnel Justification attachment should be included if a Modular Budget is being submitted.

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.

Project Short Title: R01
Proposal Number: P2544
PI: Investigator, Susan M.

Grants.gov Application Package Back

PHS 398 Modular Budget V1.1 Mark Complete Reload Form Data Save Form

Budget Period 1 | Budget Period 2 | Budget Period 3 | Summary

1 Warnings

Cumulative Budget Information

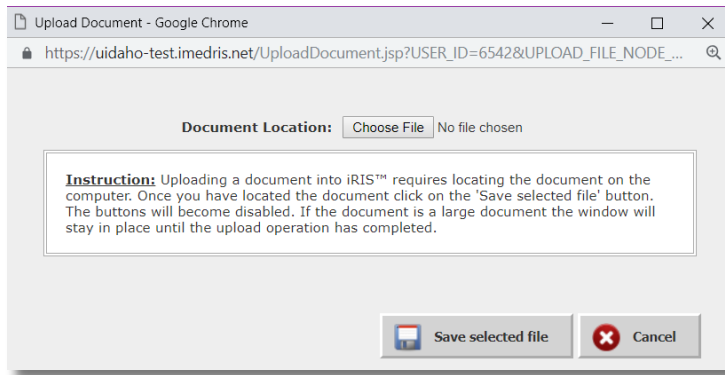
1. Total Costs, Entire Project Period

* Section A, Total Direct Cost less Consortium F&A for Entire Project Period	\$ 400000.00
Section A, Total Consortium F&A for Entire Project Period	\$
* Section A, Total Direct Costs for Entire Project Period	\$ 400000.00
* Section B, Total Indirect Costs for Entire Project Period	\$ 267189.00
* Section C, Total Direct and Indirect Costs (A+B) for Entire Project Period	\$ 667189.00

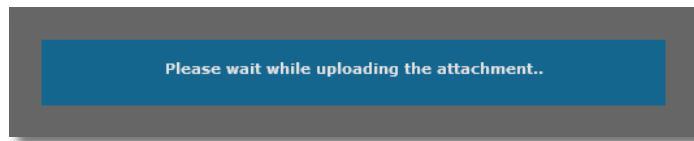
2. Budget Justifications

Personnel Justification		Add Attachment	View Attachment	Delete Attachment
Consortium Justification		Add Attachment	View Attachment	Delete Attachment
Additional Narrative Justification		Add Attachment	View Attachment	Delete Attachment

- 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.

2. Budget Justifications		
Personnel Justification	personal_justification.pdf	<input type="button" value="Add Attachment"/> <input type="button" value="View Attachment"/> <input type="button" value="Delete Attachment"/>
Consortium Justification		<input type="button" value="Add Attachment"/> <input type="button" value="View Attachment"/> <input type="button" value="Delete Attachment"/>
Additional Narrative Justification		<input type="button" value="Add Attachment"/> <input type="button" value="View Attachment"/> <input type="button" value="Delete Attachment"/>

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.

Project Short Title: R01
 Proposal Number: P2544
 PI: Investigator, Susan M.

Grants.gov Application Package Back

PHS 398 Modular Budget V1.1 Mark Complete Reload Form Data Save Form

Budget Period 1 Budget Period 2 Budget Period 3 Summary

Cumulative Budget Information

1. Total Costs, Entire Project Period

* Section A, Total Direct Cost less Consortium F&A for Entire Project Period	\$ 400000.00
Section A, Total Consortium F&A for Entire Project Period	\$
* Section A, Total Direct Costs for Entire Project Period	\$ 400000.00
* Section B, Total Indirect Costs for Entire Project Period	\$ 267189.00
* Section C, Total Direct and Indirect Costs (A+B) for Entire Project Period	\$ 667189.00

2. Budget Justifications

Personnel Justification	personal_justification.pdf	Add Attachment	View Attachment	Delete Attachment
Consortium Justification		Add Attachment	View Attachment	Delete Attachment
Additional Narrative Justification		Add Attachment	View Attachment	Delete Attachment

- 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.

Open/Add	Delete	Form Name	Required/Optional	Errors / Warnings	Complete?
+		PHS 398 Cover Page Supplement V1.4	Required		
+		PHS 398 Checklist V1.3	Required		
+		Research And Related Senior/Key Person Profile (Expanded) V1.2	Required		
+		Project/Performance Site Location(s) V1.4	Required		
+		PHS 398 Research Plan V1.3	Required		
+		Research & Related Budget V1.1	Optional		
+		R&R Subaward Budget Attachment(s) Form V1.2 Attach Budget	Optional		
+		PHS Cover Letter V1.2	Optional		
	✖	PHS 398 Modular Budget V1.1	Optional	✓	✓

- 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:

University of Idaho Account: Jennifer K Meekhof
 Path: Home > proposal mgmt. > application > proposal budget setup > grant app

My Workspaces Proposal Short Title: Short title for reference
 Proposal Number: 19005 Proposal Assistant Grants.gov Application PI: Meekhof, Jennifer K

Application For Federal Assistance SF424 (R&R) V2.0 Help My Profile Log out

Return to your application by selecting application from the file path or the Back button several times

Back

Reload Form Data Save Form

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:
 - Project narrative
 - Scope of work
 - 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
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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:

Account: Jennifer K Mockhof
 Department: IIR - RESEARCH
 Path: Home > proposal mgmt. > application > proposal budget setup

My Workspaces | Proposal Short Title: Last Draft | Proposal numbers: 19074 | PI: Smith, Alistair | Proposal Assistant: Proposal Budget

Budget Help | Budget Setup | Budget Details

BP1 Summary

Start Date: 04/01/2019 | End Date: 03/31/2020 | Salary Cap: \$189,600.00

All Periods Total Direct Costs: \$28,984.00 Total Indirect: \$21,908.00 Total: \$50,892.00
 Period 1 Total Direct Costs: \$28,984.00 Total Indirect: \$21,908.00 Total: \$50,892.00

A. Senior Key Personnel											
Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate 1	Month App. Esc Rate 2	Req Salary Averaged Base	Fringe	Totals		
Alistair Smith Role: Principal Investigator	\$0.00	\$189,600.00	10.00%	1.20	-none-	-none-	\$18,960.00	Family (academic year and summer)	\$5,024.00	\$23,984.00	
							\$189,600.00	26.50%			
Total Wages:							\$18,960.00	Total Fringes:	\$5,024.00	Total:	\$23,984.00

B. Other Personnel											
Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate 1	Month App. Esc Rate 2	Req Salary Averaged Base	Fringe	Totals		
Total Wages:							\$0.00	Total Fringes:	\$0.00	Total:	\$0.00
All Personnel Totals							\$18,960.00	Total Fringes:	\$5,024.00	Total:	\$23,984.00