Proposal Budget

B-1. Budget Lines and Cost Sharing using Enter Budget Detail page

The Enter Budget Detail page is where all proposal budget detail by category is entered, including cost sharing amounts. This page breaks out the total funding responsibilities of the sponsor and the total cost share between UD and any third parties. It also shows the breakdown for direct and F&A budget amounts.

Navigation:

1. Go to UD Financials Menu Grants → Maintain Proposal → Enter Budget Detail

1. Enter Proposal ID, Sponsor ID, PI ID, Dept ID, or other value in one of the boxes to search for your proposal
2. Click the Search button
3. Click on the desired Proposal Project from the Search Results list.
4. NOTE: Proposals with multiple projects and budget periods will have a line for each project and its associated periods in the search results. You will enter a budget for each period separately.
Enter Budget Detail Page

1. Summary Line Data
   - Line # - accept default number
   - Budget Item - use Lookup icon to select the budget category
   - Description – this will default from Budget Item, it can be changed if necessary
   - Details (required) – click the icon to build budget line with details.
     - **Salary** Budget Lines requirements:
       - When category is PERSON (Personnel), you *must* enter salary and fringes with in the Details page.
       - When a person has both Academic and Summer salary lines on a proposal, you must enter them on separate budget lines and use the Details page.
     - **Sub-recipient** Budget Line requirements:
       - When the category is SUB<25 (sub-recipient less than $25,000) select the Details icon and enter the name of the sub-recipient. Be sure the name is the same as what was entered on the Resources page.
       - For multiple sub-recipients, include multiple Details pages
       - This maps to the Proposal Approval Summary webform sub-recipient section

2. Total Direct – enter budget amount on this page when additional Details are not required.
Personnel Detail page:

1. **Row No.** – Use lookup icon to select PI, Co-PI and Key Persons associated with this proposal.
2. **Job Code** and **Rate Type** are based on HR records.

**NOTE** - Items 3 to 6 are for the Effort Reporting and Current & Pending Reports and do not impact the Sponsored Activity Report:

3. **Appointment Type** – Click the appropriate box for the type of salary/effort being requested
   - **Calendar** – any 12-month period (including fiscal year)
   - **Academic** – 9 months September to May
   - **Summer** – 3 months June to August

4. **Start/End Dates** – Defaults to **Budget Period** dates, *do not accept* these defaults. These dates calculate the **Months** field and should represent the appropriate number of *months of effort* on this project.

5. **Months** – This field is calculated based on the **Start/End** dates of the **Appointment Type**. It maps to the C&P report available in the UD Processes menu of UD Financials.

6. **Effort Pct** – Enter the effort percent the person intends to give to this project. See table on next page for common months and percentages. (This field does not affect the # of months in the **Months** field.)

7. **COL Incr Pct** and **Dt** – *Do not use*, leave blank.

8. **Merit Incr Pct**, **Dt** – these are optional – *leave blank.*
Effort Percent Rates for 9-, 10- and 11-month Faculty

<table>
<thead>
<tr>
<th>Effort %</th>
<th>9-month salary</th>
<th>10-month salary</th>
<th>11-month salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>.5 month</td>
<td>4.17%</td>
<td>4.17%</td>
<td>4%</td>
</tr>
<tr>
<td>1 month</td>
<td>8.33%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>2 months</td>
<td>16.67%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>3 months</td>
<td>25.8%</td>
<td>25%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Items 9 and 10 below are for salary amounts based on actual salary costs not Effort %. For example a 9-month faculty person: 1 month Effort = 8.33%, but Salary Cost = 1/9 or 11%. (See: table on left for Effort %s.)

9. Salary box: (NOTE: salary data will not be loaded from HR):
   - **Annualized Salary** – DO NOT USE (it uses Effort Percent incorrectly).
   - **Fixed Salary Amt** – Enter the salary amount you’ve already calculated it for this project.
   - **Budget Salary** – Defaults from the Fixed Salary Amt

10. Fringe box:
   - **Annual Fringe Amt** – Enter an amount here only if fringe is limited by the sponsor.
   - **Fringe Rate** – Defaults based on Rate Type. *(Should be changed only for some Summer appts.)*
   - **Fixed Fringe Rate** – Enter rounded amt. if calculated amount includes unwanted cents.
   - **Budget Fringe** – System calculates based on **Budget Salary X Fringe Rate**.

11. Additional personnel should not be added by clicking the + button, the preferred method is to add separate PERSON line on Enter Budget Detail page.

12. Click OK button to return to the main Enter Budget Detail page.
13. For additional **Budget Items**, click the button

14. **Budget Item** – use lookup icon to select each budget category. These categories map to accounts in the award process and accumulate fringes and F&A during the budget calculation. **The list below is also published on the Research Office website.**

15. **Total Direct** – enter budget amount on this page when additional details are not required

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Description</th>
<th>Account</th>
<th>Budget Item</th>
<th>Description</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANIMAL</td>
<td>Animal</td>
<td>140190</td>
<td>PERSON</td>
<td>Personnel - Salary &amp; Benfits</td>
<td>121800</td>
</tr>
<tr>
<td>CLERK</td>
<td>Secretarial</td>
<td>123000</td>
<td>PSTDOC</td>
<td>Postdoctoral Associates</td>
<td>120800</td>
</tr>
<tr>
<td>COMPTR</td>
<td>Information Systems</td>
<td>170000</td>
<td>PTOTHR</td>
<td>Partic. Support Other</td>
<td>146900</td>
</tr>
<tr>
<td>CONSLT</td>
<td>Consultant Services</td>
<td>146000</td>
<td>PTSTIP</td>
<td>Partic. Support Stipends</td>
<td>146900</td>
</tr>
<tr>
<td>DOTRAV</td>
<td>Domestic Travel</td>
<td>130100</td>
<td>PTSUBS</td>
<td>Partic. Support Subsistence</td>
<td>146900</td>
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<tr>
<td>EQUIP</td>
<td>Equipment</td>
<td>160000</td>
<td>PTTRAV</td>
<td>Partic. Support Travel</td>
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<tr>
<td>FABCAT</td>
<td>Fabrication</td>
<td>153100</td>
<td>RENO</td>
<td>Alterations &amp; Renovations</td>
<td>150000</td>
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<tr>
<td>FACADM</td>
<td>Facilities and Administration</td>
<td>195000</td>
<td>RENTAL</td>
<td>Building Rental No F&amp;A</td>
<td>154200</td>
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<tr>
<td>FOOD</td>
<td>Food Charges</td>
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<td>REU-C</td>
<td>REU Student - Citizen</td>
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<td>REU-NC</td>
<td>REU Student – Non-Citizen</td>
<td>148200</td>
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<tr>
<td>FRINGE</td>
<td>Fringe Benefits</td>
<td>129000</td>
<td>SB&lt;25F</td>
<td>Subaward F&amp;A &lt; $25,000</td>
<td>153200</td>
</tr>
<tr>
<td>GRADST</td>
<td>Graduate Students</td>
<td>122600</td>
<td>SHIP</td>
<td>Ship Charges No F&amp;A</td>
<td>146800</td>
</tr>
<tr>
<td>GRDFL</td>
<td>Research Fellow No F&amp;A</td>
<td>122700</td>
<td>SRPERS</td>
<td>Senior Personnel</td>
<td>121100</td>
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<tr>
<td>OCMNT</td>
<td>Occupancy and Maintenance</td>
<td>150000</td>
<td>STUWG</td>
<td>Student Wages</td>
<td>126000</td>
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<tr>
<td>OSRPER</td>
<td>Other Senior Personnel</td>
<td>120200</td>
<td>SUB&gt;25</td>
<td>Subaward Direct &gt; $25,000</td>
<td>153300</td>
</tr>
<tr>
<td>OTHER</td>
<td>Other Expenses</td>
<td>140000</td>
<td>SUPL</td>
<td>Supplies</td>
<td>140000</td>
</tr>
<tr>
<td>OTHRNO</td>
<td>Other Expenses - NO F&amp;A</td>
<td>140000</td>
<td>SUPLNO</td>
<td>Supplies - NO F&amp;A</td>
<td>140000</td>
</tr>
<tr>
<td>OTPERS</td>
<td>Other Personnel</td>
<td>125200</td>
<td>TRAVEL</td>
<td>Travel</td>
<td>130000</td>
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<tr>
<td>OTPROF</td>
<td>Other Professionals</td>
<td>120400</td>
<td>TUITIO</td>
<td>Tuition</td>
<td>149000</td>
</tr>
<tr>
<td>PBLCTN</td>
<td>Publication/Documentation</td>
<td>148300</td>
<td>UNGRAD</td>
<td>Undergraduate Students</td>
<td>126000</td>
</tr>
</tbody>
</table>
Applying Cost Share

Cost Share represents the amount not directly charged to the sponsor; however it is an actual cost incurred by the University for this project. Keep these guidelines in mind:

1. **Distribute the cost share on individual budget lines**
   - Cost sharing budget data should be entered on separate lines

2. Enter amount in the **Total Direct** column (or use the Details icon if appropriate)

3. **Mandatory Cost Share** checkbox – if required by your solicitation, check this box

4. Click the **Cost Share** link to apply cost share to the PI’s salary.
5. **Cost Share** is the percent of direct cost for this budget item, there are three ways to enter it:
   - **Cost Share Percent** – Enter the *percent* of direct cost covered by cost share and the system will calculate the *Cost Share Direct* amount.
   - **Cost Share Direct** – Enter the amount of direct cost covered by cost share and the system will calculate the *Cost Share Percent*.
   - **Sponsor Direct** – Enter the sponsor’s direct amount and the system recalculates the cost share direct amount and percent.

6. **Cost Sharing Distribution** – these entries map to the Proposal Approval webform and will facilitate the routing for approval of the cost share commitments by the institutional representatives. All cost share is approved through this internal routing mechanism.
   - **Institution** – Enter one or more departments’ cost share by either **C/S Pct** or **C/S Direct**
   - **Third Party** – Enter industry cost share (if any) by either **C/S Pct** or **C/S Direct**
   - **Distribution Totals** – Note the running totals at the bottom, *the percent must equal 100%*.

7. Click the **OK** button to return to the main page.
8. Click **Save** button once you are back on the **Enter Budget Detail** page.

9. **The Cost Share** amounts are displayed in the Cost Share columns and as running totals at the bottom of the page.
Continue Adding More Budget Categories

1. Add more budget categories as needed by clicking the plus (+) button.
   - Enter budget amounts by clicking the Details icon or by entering in the Total Direct field.
   - The Total Direct field becomes a closed field when the budget numbers are entered in the Budget Detail page.

2. The system keeps running totals of direct costs, cost share amounts, F&A and total budgets.
   - Every time you change or add an amount, the system updates these totals.

3. Total Sponsor Budget is a running total of Budget Item amounts.

4. Click the Details icon on any of the categories to enter additional information.
   - For example, click the icon on the Equipment line to build this budget if you have multiple pieces of equipment or want to specify the type of equipment.
   - When you build the budget in the Budget Detail page, it will overwrite the amount on this Summary page.
   - When using the Sub-Recipients categories of SB<25F or SUB>25, you must use the Details icon to record the name of the sub-contract institution.

5. Click the Save button.
Build Budget in the Budget Detail page

1. For each type of equipment, enter:
   - **Description**
   - **Total Direct** cost
   - or a **Quantity** and a **Unit Price** (system will calculate the Total Direct cost)
   - **Begin Date** and **End Dates** if required by the sponsor
   - Use **button to add more equipment lines

2. The system updates the **Total Direct Budget** amount each time you add or change an amount, quantity, or unit price.

3. Click **OK** button to return to the main page.
More information on Budget Line Summary page

4. Click the **View FA Rate** link (Facilities & Administration) button to view the F&A calculation based on your proposal budget for this period.

- This page is informational and cannot be changed (see below).
- The F&A rate is set on the **Budget** page in **Maintain Proposal**
5. Click the **OK** button to return to the main page.
6. Click the **Save** button.
7. Verify your budget is complete.
   - Make adjustments by clicking **Details** icon, changing **Total Direct** amounts or clicking the **Cost Share** link.
   - Click **Save** button after any changes.

8. Click **Next in List** button to enter budget for any subsequent budget periods for this proposal.
Next in List button brings up the next Budget Period for the same Proposal Project.

You now have the 2nd Budget Period for the same proposal ready for budget entries.

Repeat the budget entry process from the beginning.

10. OR use the Copy Budget Period page
- Use breadcrumbs at the top Proposals > Copy Budget Period
- Follow the instructions in C-2 Copy Budget Period (pages 3-5)
- See section B: Building a Multi-Period Budget.