Proposal Budget

B-1. Budget Lines and Cost Sharing using **Enter Budget Detail page (v8.9)**

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:**
- Go to UD Financials Menu Grants » Maintain Proposal » Enter Budget Detail

**New in v8.9:**
- **Enter Budget Detail page** replaces the page in v8.4 called Budget Line Summary
- **Total Sponsor Budget** amount is now a running total as budget lines are added
- **Budget Header** and **Budget Periods** pages no longer exist. This functionality is found in Maintain Proposal/Budget and Proposal pages.
- **Effort %** is handled differently in Personnel Detail page with Start/End Dates (see pg. 3)

![Diagram of proposal budget process]

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 or Co-PI 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.*
Items 9 and 10 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 above.)

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 main 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 OVPRGS website.

15. **Total Direct** - 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; Benefits</td>
<td>121800</td>
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<tr>
<td>CLERK</td>
<td>Secretarial</td>
<td>123000</td>
<td>PSTDOK</td>
<td>Postdoctoral Associates</td>
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<td>COMPTR</td>
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<td>170000</td>
<td>PTOTHOR</td>
<td>Partic. Support Other</td>
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<td>CONSRT</td>
<td>Consultant Services</td>
<td>146000</td>
<td>PTSTIP</td>
<td>Partic. Support Stipends</td>
<td>146900</td>
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<tr>
<td>DOTTRAV</td>
<td>Domestic Travel</td>
<td>130100</td>
<td>PTSUBS</td>
<td>Partic. Support Subsistence</td>
<td>146900</td>
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<td>FABCAT</td>
<td>Fabrication</td>
<td>153100</td>
<td>RENO</td>
<td>Alterations &amp; Renovations</td>
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<td>FACADM</td>
<td>Facilities and Administration</td>
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<td>RENTAL</td>
<td>Building Rental No F&amp;A</td>
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<td>REU Student – Non-Citizen</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>
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<tr>
<td>GRADST</td>
<td>Graduate Students</td>
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<tr>
<td>GRDFL</td>
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<td>SRPERS</td>
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<td>STUWG</td>
<td>Student Wages</td>
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<td>OSRPER</td>
<td>Other Senior Personnel</td>
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<td>SUB&gt;25</td>
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<td>Supplies</td>
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<tr>
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<td>140000</td>
<td>SUPLNO</td>
<td>Supplies - NO F&amp;A</td>
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<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
   - Enter amount in the **Total Direct** column and click the **Cost Share** link
   - **Mandatory Cost Share** checkbox – If required by your solicitation, check this box

2. Click the **Cost Share** link to apply cost share to the PI’s salary.
3. **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.

4. **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%*.

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

<table>
<thead>
<tr>
<th>Line #</th>
<th>Budget Item</th>
<th>Description</th>
<th>Sponsor Direct</th>
<th>Cost Share</th>
<th>Mandatory Cost Share</th>
<th>Institution Cost Share</th>
<th>Third Party Cost Share</th>
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<tbody>
<tr>
<td>10</td>
<td>PERSON</td>
<td>Personal - Salary &amp; Benefits</td>
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<td>Cost Share</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Add more budget categories as needed by clicking then **button
   - Enter budget amounts by clicking **Details** icon OR entering in **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. **New in v8.9: Total Budget** has been removed from the top section. **Total Sponsor Budget** now 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 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 **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.
Save Your Work

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 button. Click Save button after any changes.

8. Click Next in List button to enter budget for any subsequent budget periods for this proposal.
9. You now have the 2nd Budget Period for the same proposal ready for budget entries.

10. Repeat the budget entry process from the beginning.

11. OR use the Copy Budget Period menu item and follow the instructions with the same name on pages (C2) 3 to 5, see section B. BUILDING A MULTI-PERIOD BUDGET.