Budget Details – Quick Guide

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

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

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

Budget Periods

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

Faculty Effort

For each budget period, enter the percent effort for all faculty devoting effort to the project. The PI and all OSFs entered into the PDRF will be available in the picklist. The effort entered on this page is reflected as the proposed committed effort on Other Support reports.
Enter the **Direct Costs** into applicable Budget Category across the Periods. Use Other inclusions/Other exclusions for costs that don’t fit into a Category. Round entries to the nearest dollar. Do not include the cost sharing budget on this page. If the proposal is awarded, your Institutional Official will update this budget as needed and the figures will be pushed into the PTA setup transaction for new/renewal projects. **Budget Categories** denoted with an asterisk (*) are excluded from IDC burdening. *(Hint: in the event the budget totals are off by $1 due to rounding, try entering $1 into either the Other inclusions/Other exclusions category to get the budget to match)*

**F&A Calculations**

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

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

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