

## Entering Budget Information

To add direct and indirect budget details to a project, you will first need to find and open the desired proposal. You can also add budget information to a project as its being created if you have the information available.

If budget details need to be edited in the future, you can access the budget information directly by navigating as follows:

Main Menu > Grants > Proposals > Enter Budget Details

Budget information can be added to a proposal project at any pre-award stage. Take class **PST960 PreAward: Grant Proposals 9.1** for a detailed explanation of this process.

## Navigation

1. Click the **Main Menu** button.
2. Click the **Grants** menu.
3. Click the **Proposals** menu.
4. Click the **Maintain Proposal** menu.
5. Enter the proposal ID in the **Proposal ID** field and click **Search**.

## Budgets Tab

6. Once you have found and opened the proposal to which you wish to add budget information, click the **Budgets** tab.

7. If proposal contains multiple projects, select the desired project to which you wish to add budget information by clicking the **Show Next/Previous Row** buttons in the Proposal Project section. Confirm the correct project number displays in the Project ID field.

## F&A and Pricing Setup

In order to have the budget calculations for this project include indirect costs in addition to direct costs, the Rate Type and FA Base information must be entered *first*.

8. Click the **F & A and Pricing Setup** link.
9. Click the **Look up Rate Type** button.
- Note:** The **Rate Type** determines what type of activities will be conducted on this project.
10. Click the **Look Up** button and scroll down, if needed.
11. Click the desired Rate Type option.
12. Click the **Look up FA Base** button.

**Note:** The **FA Base** determines at what rate the indirect costs will be calculated.

**Note:** MTDC = Modified Total Direct Costs and will appear as the FA Base choice by default. The federally negotiated FA Rate % for FA Base MTDC is 46.50% as of the date of this guide. Starting 7/1/12 the rate will rise to 49.00% and will rise again to 50% on 7/1/14.

**Note:** If the project is to use a FA Rate that is different than the federally negotiated rate, be sure to delete any Budget Rate rows that are future dated from the current date of the project and input the appropriate rate in the top row. If the defaulted federally negotiated rows are left, the project will update automatically with whatever percentage is indicated on the dates indicated.

**Note:** For more detailed information on F&A Base and Rates visit  
<http://fa.ufl.edu/cg/capolicy/indirectcostrates.asp>

13. Click the **Look Up** button and scroll down, if needed.
14. Click the desired FA Base choice if different from MTDC.
15. Click the **OK** button.

## Budget Information

Once the F&A (Indirect Cost) information is entered, the rest of the budget data can be entered.

Budget information is entered for each budget period within each project. Budget periods are usually 12 month time frames into which a project is divided for budgetary and funding purposes.

16. Click the link for the desired budget period to access the Enter Budget Detail page.

**Enter Budget Detail**

Proposal: 00085223      Currency: USD  
 Version: V101      Start Date: 05/11/2012      End Date: 03/31/2013  
 Title: Nanostructured Dental Composites       Modular?

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Project ID: 00101020      Budget Period: 1      [Overall Cost Share](#)  
 Budget ID: 1      Start Date: 05/11/2012      End Date: 03/31/2013      [View FA Rate](#)

**Details, CostShare, Justification** Customize | Find | First | 1 of 1 | Last

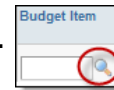
Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10				0.00	0.00	<a href="#">Cost Share</a>	<input type="checkbox"/>		

Sponsor Direct: 0.00      Sponsor F&A: 0.00      Total Sponsor Budget: 0.00  
 Institution Cost Share: 0.00      Institution Cost Share F&A: 0.00      Total Inst C/S Budget: 0.00  
 Third Party Cost Share: 0.00      Total TP C/S Budget: 0.00  
 Total Direct: 0.00      Total F&A: 0.00      Total Budget: 0.00

[Return To Maintain Proposal](#)

There are many Budget Item categories that may be part of the project. You will add as many as are relevant to this project.

17. Click the **Look up Budget Item** button to display the list of choices.

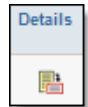


18. Click the **Look Up** button.

19. Scroll down, if needed.

20. Click the **desired budget category** link.

21. Salary information can be added manually into the **Total Direct field** or by using the **Details** button. Be sure to comply with your college's requirements to complete this information correctly.



22. If you wish for the system to calculate the salary information, click the **Details** button.

23. Click the **Look up Row No** button.

24. Click the **Look Up** button.

25. Click the **desired professional** link.

26. If the professional has more than one job at UF, they will have more than one employment record. If so, be sure to select the correct employment record number from the **Empl Rcd#** field.

27. Click the correct **appointment type** option.

28. The **Start/End dates** default based on the budget period indicated when the grant proposal was created. Use these fields to reflect the employee's period of work on this project.

29. Double-click in the **Effort Pct** field.

30. Enter the percentage of time this professional is dedicating to this project (e.g., "**20**").

31. If applicable use **Cost of Living Increase Pct** field to enter any cost of living increase percentage.

32. If entering a Cost of Living percentage, enter the start date of the proposal as the Cost of Living Increase date to assure the system calculates correctly.

**Note:** Since the Cost of Living effective date defaults to 1901, it is important to enter an effective date in this field and not to leave it blank.

33. If applicable, use merit increase percentage and effective date fields to indicate anticipated merit increase percentage and effective date.

34. Salary and Fringe amounts default based on HR information in the system. If an employee is not in the system, or to override defaulted data, enter salary information into the **Fixed Salary Amt** field and fringe information into the **Fixed Fringe Amt** field.

**Note:** If you enter a fixed salary amount or a fixed fringe amount, those amounts become the total salary and fringe for that record--the system will no longer calculate using such features as Percent of effort.

35. If there were multiple PIs working on this project, you would click the **Add a new row (plus-sign)** button and add an additional row and repeat inputting the appropriate salary information for that person.

36. Click the **OK** button.

37. To add the next budget category, click the **Add a new row** button.

38. Additional budget category values can be inputted directly into the **Total Direct** field.

### Cost Sharing

Cost sharing is when a portion of the costs of a project are shared by UF or a third party. Cost sharing amounts can be attached to the project as a whole or to specific budget line items.

**Note:** Cost sharing information must additionally be submitted in hard copy form. To review information on the university's cost sharing policy, go to the section on cost sharing at

[http://www.research.ufl.edu/research/handbook/researcher\\_handbook/section4.html#RTFToC18](http://www.research.ufl.edu/research/handbook/researcher_handbook/section4.html#RTFToC18)

**Note:** Cost Share reports are available in Enterprise Reporting.

39. Click the **desired budget line Cost Share** link or the **Overall Cost Share** link
40. Enter the cost sharing amount directly into the **Cost Share Direct** field.
41. If the cost sharing is funded from within UF, enter in the appropriate Department/College ID in the Department field.
42. Enter the appropriate cost sharing amount into the **C/S Direct** field.  
Note: The C/S Pct (cost sharing percent) field will populate automatically based on the amount in the C/S Direct field.
43. If a third party is providing the cost sharing, enter the third party information and either the percentage of the total cost sharing for which the third party will account (C/S Pct) or the direct dollar amount contributed by the third party (C/S Direct)
44. Click the **OK** button.
45. Click the **Save** button.

If you need help with...

--Technical issues, contact the UF Help Desk at 392-HELP or [helpdesk@ufl.edu](mailto:helpdesk@ufl.edu).

--Grant proposal policies or procedures, contact the Division of Sponsored Research, Processing and PreAward Services office, 392-9267 or [ufproposals@ufl.edu](mailto:ufproposals@ufl.edu).

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