



Creating a Detailed Budget

The General Budget Information SmartForm

1. Select the name of the budget that you are preparing to complete.

A screenshot of a web interface showing a "Budgets" tab. The tab has two sub-tabs: "Budgets" and "History". The "Budgets" sub-tab is active. Below the sub-tabs, the text "Working Budgets" is displayed. Underneath, there is a section titled "Name" with a horizontal line below it. A single entry is listed: "Pittsburgh Curling Club" preceded by a small icon of a document with a folded corner.

2. You will now be in the Budget (BU) WorkSpace. Select Edit Budget.

A screenshot of a web interface showing a "Next Steps" section. The section has a title "Next Steps" in a bold, dark font. Below the title is a large, dark blue button with the text "Edit Budget" in white.

3. Complete the General Budget Information SmartForm.

1. Enter a Title (or keep the default title). Select the Principal Investigator. Indicate whether this is a Subaccount budget or not. Determine the work location.

*** Budget title:** ?

*** Principal Investigator for this budget:**

*** Is this a Subaccount budget?** ?
☐ Yes ☒ No [Clear](#)

*** Is this work On or Off Campus?** ?
If you change the rate from On-Campus, it will be necessary to click [SAVE](#) above for the correct rates to appear.
☒ On Campus
☐ Off Campus

2. Does this budget use the standard indirect cost base and rates? The rate pulled into your budget is determined by the type of project selected on the Funding Proposal General Proposal Information SmartForm. If this rate is correct indicate Yes.

*** Does this budget use the standard indirect cost base and rates?**
☒ Yes ☐ No [Clear](#)

Standard F&A cost base and rates

	Period 1	Period 2
F&A Cost Base	Start: 7/1/2023 End: 6/30/2024	Start: 7/1/2024 End: 6/30/2025
MTDC	Rate: 59%	Rate: 59%

If the indirect cost rate pre-populated into your budget is not the rate that is going to be used select No, enter the rates into the table, and select why a different rate is being used.

*** Does this budget use the standard indirect cost base and rates?** ?
☐ Yes ☒ No [Clear](#)

Standard F&A cost base and rates

	Period 1	Period 2
F&A Cost Base	Start: 7/1/2023 End: 6/30/2024	Start: 7/1/2024 End: 6/30/2025
MTDC	Rate: 59%	Rate: 59%

Non-standard F&A cost base and rates

	Period 1	Period 2	
F&A Cost Base	Start: 7/1/2023 End: 6/30/2024	Start: 7/1/2024 End: 6/30/2025	
MTDC	Rate: <input type="text" value="10%"/>	Rate: <input type="text" value="10%"/>	Clear

*** If no, indicate why:** ?
☐ Sponsor Mandated
☐ F&A Waiver

3. Indicate that a detailed budget is going to be completed within MyFunding. Separate travel and Trainee grids are not required even if travel and trainees are on the budget.

*** Do you intend to complete a detailed budget? ?**
☒ Yes ☐ No [Clear](#)

Will you require detailed grids for this budget submission?

Select YES if you want a separate budget grid for a cost category. MyFunding will provide one on a following page. Select NO if you prefer to create entries for a category on the General Costs budget grid. MyFunding will include that category in the Cost Type menu on the General Costs grid.

*** Travel:**
☐ Yes ☒ No [Clear](#)

*** Trainee:**
☐ Yes ☒ No [Clear](#)

4. Will this budget be included in the proposal? Selecting Yes incorporates the budget in the total dollars found on the Funding Proposal's Financials tab.

Include in proposal budget?
☒ Yes ☐ No [Clear](#)

5. Verify the salary cap.
6. Complete the inflation rate questions.

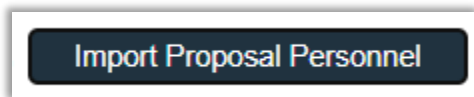
Apply inflation rate to personnel costs?
☒ Yes ☐ No [Clear](#)

Enter inflation rates:

	Inflation Rate	Inflate Period 1
Personnel Cost:	<input type="text" value="3"/> %	<input type="checkbox"/>
General Cost:	<input type="text" value="3"/> %	<input type="checkbox"/>

The Personnel Cost Definition SmartForm

1. This page is for specifying institutional personnel this budget must account for. When this page is saved, Grants creates rows on the following Personnel Costs page for each person listed here.
2. The Import Proposal Personnel button imports the PI and all other institutional personnel added to the proposal's Personnel page as "Senior/Key person on the proposal" or as "Other personnel." Personnel added as "Other significant contributor on the proposal" are not imported. You can import personnel only once per budget; this button does not appear after that.

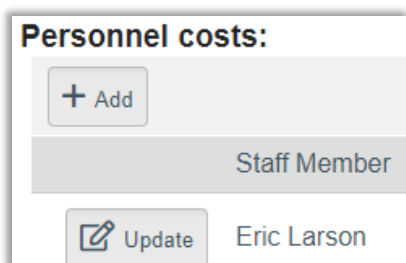


3. To view, add, or delete personnel from the proposal before importing, click Go to additional personnel on funding proposal.

Personnel Cost Definition

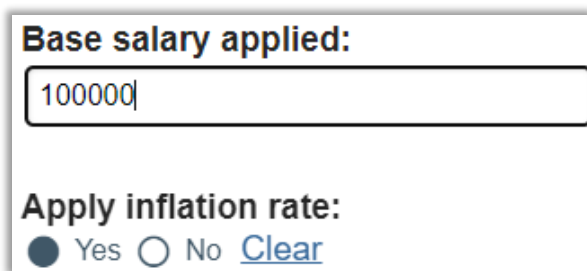
[Go to additional personnel on funding proposal](#)

4. To add these personnel individually, click the Add button under Personnel costs, and complete the resulting form. You can also create a placeholder salary row for a position yet to be staffed by selecting Staff Member To Be Determined.

A form titled "Personnel costs:" with a light gray background. It contains a "+ Add" button, a "Staff Member" label, and an "Update" button next to the name "Eric Larson".

Personnel costs:	
+ Add	
	Staff Member
Update	Eric Larson

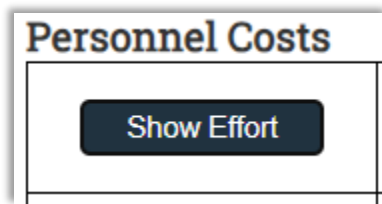
5. To add salary and determine if inflation is allied select Update.

A form titled "Base salary applied:" with a light gray background. It contains a text input field with the value "100000", an "Apply inflation rate:" section with radio buttons for "Yes" and "No", and a "Clear" link.

Base salary applied:	
<input type="text" value="100000"/>	
Apply inflation rate:	
<input checked="" type="radio"/> Yes	<input type="radio"/> No Clear

The Personnel Costs SmartForm

1. Select Show Effort to open the Personnel table for editing.



The screenshot shows a window titled "Personnel Costs". Inside the window, there is a dark blue button with the text "Show Effort" in white.

2. Enter the effort, review the fringe benefit rate, and edit if necessary. Click Save to calculate.

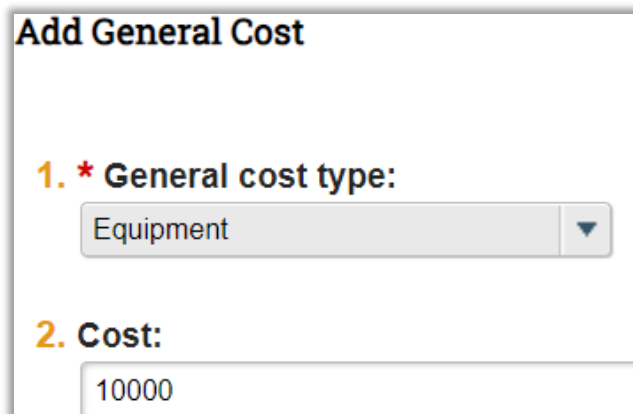


The screenshot shows the "Personnel Costs" window with the following data:

Personnel Costs	
Period 1 3/9/2021 3/8/2022	
Show Totals	
Person: Eric Larson Role: PD/PI	Effort: 10 %
	Sal Req: 10 %
	FB Rate: 34.9 %
	Base: \$100,000.00
Salary Cost Total:	\$10,000.00
Benefits Cost Total:	\$3,490.00
Personnel Cost Total:	\$13,490.00

The General Cost Definition SmartForm

1. For a detailed budget a budget category will be selected. Select the appropriate category, enter an amount, provide a description, and determine if inflation is to be applied. If you select to not apply inflation the budget table on the General Costs SmartForm will be open for editing.

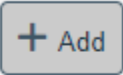


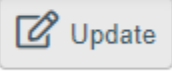

The screenshot shows a window titled "Add General Cost". It contains two numbered sections:

- 1. * General cost type:** A dropdown menu with "Equipment" selected.
- 2. Cost:** A text input field containing the value "10000".

2. Select OK to add the budget items.




General costs:

 + Add

	Cost Type	Description	Cost
	Equipment	Computers	\$10,000.00
	Travel: Domestic		\$5,000.00

The General Costs SmartForm

1. If you selected that inflation is not to be applied for any category on the General Costs Definition SmartForm the entry for that item will be editable in the General Costs table. One reviewed and completed, save and exit the SmartForm.

General Costs		
 Save	Period 1 4/27/2020 4/26/2021	Period 2 4/27/2021 4/26/2022
Cost Type: Equipment Description: Computers	\$10,000.00 	\$10,000.00 
Cost Type: Travel: Domestic Description:	\$5,000.00	\$5,150.00
General Cost Total:	\$15,000.00	\$15,150.00