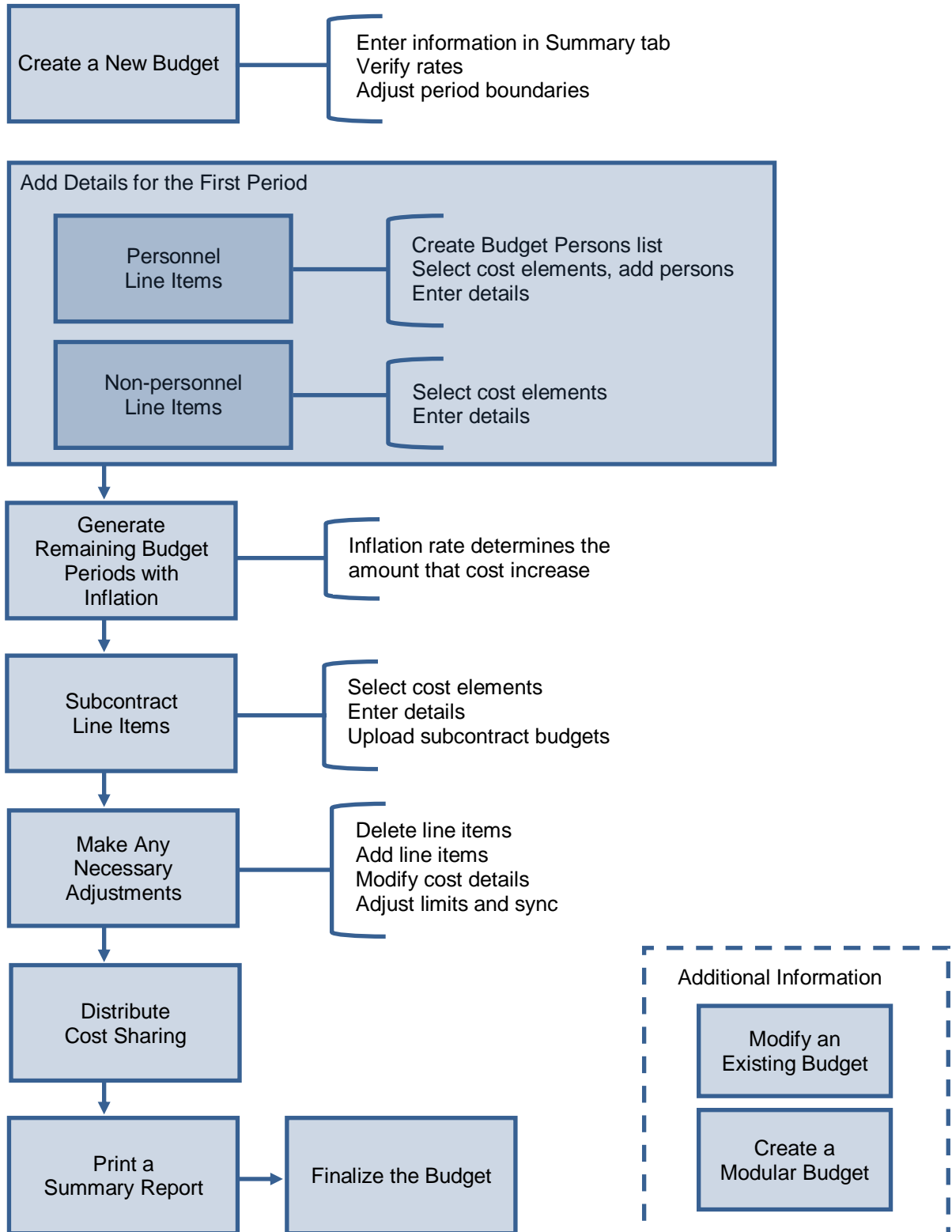


Overview of the Budget Process

The process of creating a new budget includes the steps shown below. This chapter also includes information about copying and modifying an existing budget and about creating a modular budget.



Budget Screen


The budget screen (CREATE BUDGET FOR PROPOSAL or MODIFY BUDGET FOR PROPOSAL) consists of a SUMMARY tab, TOTAL tab, and a tab for each budget period.

Icons specific to creating and modifying the budget are on the second toolbar. That toolbar is shown here. Icons are shown when they are used in the instructions that follow.



Opening a Budget

Whether you are creating a new budget, creating a new version, or modifying a budget, you have a choice of two methods for opening a budget:

- Search for the proposal. Highlight it in the DEVELOPMENT PROPOSAL LIST screen and select **Edit > Budget**.
- If you have the proposal open, from the PROPOSAL DETAILS screen click the **Proposal Budget** icon  or select **Edit > Budget...**

If another user is working on the proposal, use Edit > Budget. This allows you to open the budget in Modify mode if another user is not modifying the budget. If you are the only person working on this proposal, you can use either method.

Typically when you open a budget the SELECT BUDGET window opens. In some special situations other windows open first.

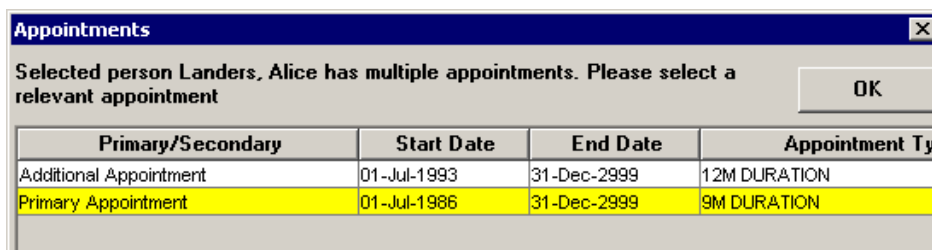
Special Situations When Opening a Budget

These windows might open before the SELECT BUDGET window.

Appointments Window

This occurs when someone listed on the INVESTIGATOR tab or the KEY PERSON tab has more than one appointment.

- Select the **Primary Appointment** or the one with **Appointment Type 9M DURATION** if the person is a faculty member or **12M DURATION** for all other employees. Click **OK**.

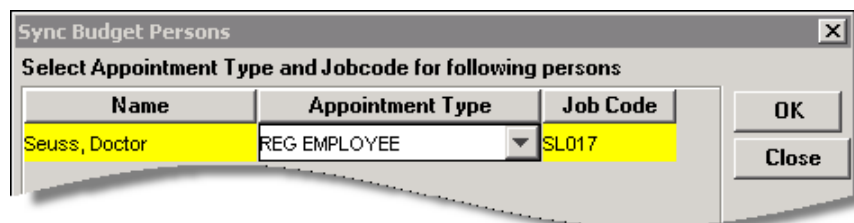


Primary/Secondary	Start Date	End Date	Appointment Ty
Additional Appointment	01-Jul-1993	31-Dec-2999	12M DURATION
Primary Appointment	01-Jul-1986	31-Dec-2999	9M DURATION

Sync Budget Persons Window

This situation typically occurs when someone is added to the INVESTIGATOR tab or the KEY PERSON tab from the Rolodex.

- Accept the Coeus suggested code, or enter a **Job Code** and click **OK**.



Name	Appointment Type	Job Code
Seuss, Doctor	REG EMPLOYEE	SL017

Select Budget Window

The SELECT BUDGET window contains the fields and buttons listed below.

The screenshot shows the 'Select Budget' window with the following details:

- Proposal Number: 00003890
- Sponsor: 000500 : NSF
- Budget Status: Incomplete
- Final Version: 2

Version	Start Date	End Date	Total Cost	Final
1	01 Jan 2009	31 Dec 2013	\$751,687.45	<input type="checkbox"/>
2	01 Jan 2009	31 Dec 2013	\$533,876.96	<input checked="" type="checkbox"/>
3	01 Jan 2009	31 Dec 2013	\$141,583.76	<input type="checkbox"/>

Buttons on the right: OK, Cancel, New, Modify, Display, Copy.

Summary fields:

- Direct Cost: \$328,528.58
- Indirect Cost: \$205,348.38
- Cost Sharing: \$.00
- Underrecovery: \$10,830.64
- Residual Funds: \$.00
- OH Rate Type: MTDC

Comments: [Empty text area]

Last Updated: 11-May-2008 10:14:53 AM | Updated User: Mondello, Larry

- **Proposal Number** — Supplied by Coeus when the proposal is created.
- **Sponsor** — Entered in the PROPOSAL tab of the PROPOSAL DETAILS screen.
- **Budget Status** — Remains at **Incomplete** until you change it.
- **Final Version** — The budget version you select to send to the sponsor.
- **Pointing hand icon** — This icon points to the selected budget version.
- **Version** — Budget versions are numbered sequentially by Coeus.
- **Start Date** — Enter in the SUMMARY tab of the BUDGET screen.
- **End Date** — Enter in the SUMMARY tab of the BUDGET screen.
- **Total Cost** — Calculated by Coeus.
- **Final** (checkbox) — The budget version you select to send to the sponsor.
- **OK** — Save changes and close the SELECT BUDGET window.
- **Cancel** — Close the SELECT BUDGET window without saving.
- **New** — Create a new budget version.
- **Modify** — Open the selected budget version in modify mode.
- **Display** — Open the selected budget version in read-only mode.
- **Copy** — Copy the selected budget version to create a new version.

Read-Only Fields

These read-only fields display information about the selected budget version:

- **Direct Cost** — Calculated by Coeus from data you enter in budget line items.
- **Underrecovery** — Not used at UC.
- **Indirect Cost** — Calculated by Coeus.
- **Residual Funds** — Enter in the SUMMARY tab of the BUDGET screen.
- **Cost Sharing** — Calculated by Coeus.
- **OH Rate Type** — Select in the SUMMARY tab of the BUDGET screen.
- **Comments** — Enter in the SUMMARY tab of the BUDGET screen.
- **Last Updated** — Date and time of the last update to the budget.
- **Updated User** — Name of the user who made the last update.

Creating a New Budget

1. Open the SELECT BUDGET window (see [Opening a Budget](#), page 2).

Select Budget

Proposal Number: 00001298
Sponsor: 000340 : NIH

Budget Status: (None) Final Version:

Version	Start Date	End Date	Total Cost	Final

Direct Cost: \$.00 Underrecovery: \$.00
 Indirect Cost: \$.00 Residual Funds: \$.00
 Cost Sharing: \$.00 OH Rate Type:
 Comments:
 Last Updated: Updated User:

2. Click **New**. The CREATE BUDGET FOR PROPOSAL screen opens.

Create Budget for Proposal 00001298, Version 1

Summary | Period 1 | Total

Version: 1 Final: Start Date: 01-Jul-2010 End Date: 30-Jun-2020
 Residual Funds: \$.00 Total Cost Limit: \$.00 OH Rate Type: MTDC
 Total Cost: \$.00 Total Direct Cost Limit: \$.00 Direct Cost: \$.00
 Indirect Cost: \$.00 Underrecovery: \$.00 Cost Sharing: \$.00
 Comments: Budget Status: (None)
 UR Rate Type: MTDC
 On/Off Campus: Default
 Modular Budget:
 Submit Cost Sharing:
 Proposal Hierarchy:

Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Jul-2010	30-Jun-2011	12.0	\$.00	\$.00	\$.00	\$.00	\$.00
2	01-Jul-2011	30-Jun-2012	12.0	\$.00	\$.00	\$.00	\$.00	\$.00
3	01-Jul-2012	30-Jun-2013	12.0	\$.00	\$.00	\$.00	\$.00	\$.00
4	01-Jul-2013	30-Jun-2014	12.0	\$.00	\$.00	\$.00	\$.00	\$.00
5	01-Jul-2014	30-Jun-2015	12.0	\$.00	\$.00	\$.00	\$.00	\$.00

3. Enter information in tabs of this screen as explained in the following sections.

Entering Information in the Summary Tab

Users may need to enter information in the white, editable fields of the SUMMARY tab:

- **Start Date** and **End Date**: Coeus fills these fields with the start and end dates entered in the Details tab. Verify these dates and modify them as appropriate.
- **Residual Funds**: Enter the amount that remains if the proposal is a continuation or renewal and funds remain from the previous award.
- **Total Cost Limit**: You can use this field as a reminder, but it is not necessary to fill it in. This is the maximum cost (including indirect costs) to be covered by the award.
- **Total Direct Cost Limit**: You can use this field as a reminder, but it is not necessary to fill it in. This is the maximum cost direct costs to be covered by the award.
- **OH Rate Type**: Coeus displays the maintained overhead (OH) Type for the **Activity Type** selected in the PROPOSAL tab of the PROPOSAL DETAILS screen. In most cases, this rate type should be left at the displayed setting unless there is a reason to make a change.
- **Budget Status**: Displays the status.
- **UR Rate Type**: Not used at UC.
- **Modular Budget** (checkbox) Select this checkbox to mark this budget as an NIH modular submission style.
- **Submit Cost Sharing** (checkbox) The default is checked to submit – to publish budgeted cost share expense on the appropriate Grants.gov s2s forms.
 - **Uncheck** the box to prohibit ALL the cost share expenses from appearing on the Grants.gov forms OR
 - Keep the box **checked** to submit all or control the inclusion of c/s expense at each **line item detail**.
- **On/Off Campus** Use the On/Off campus selection to override the cost element overhead mapping.
 - Select “Off” to have Coeus apply the maintained Off Campus Overhead rates to all the budgeted cost elements, despite the cost element description of On Campus.
 - Select “On” to have Coeus apply the maintained On Campus Overhead rates to all budgeted cost elements, despite the cost element description of Off Campus.
 - Select “Default” to have Coeus apply the maintained OH rate for that cost element. Default allow for the inclusion of both On- and Off-campus rates in one budget.

Note: If you change any of the Rates (OH, or On/Off Default) a message displays asking you to recalculate. Click **Yes**. This message also displays if you made a change to the **Activity Type** in the PROPOSAL DETAILS screen.

- **Comments**: Notes in this field can be viewed only by Coeus users and reviewers. Use these comments to distinguish between different versions of the budget. (For example, you might enter **2 Postdocs, 3 RAs** in one version and **No Postdocs, 4 RAs** in another.)

Budget Summary Tab: Read-Only Fields

These fields in the upper portion of the SUMMARY tab display information about the selected budget version:

- **Version:** The version of the budget.
- **Total Cost:** Sum of costs in all periods, calculated by Coeus from data entered in the budget.
- **Direct Cost:** Total of direct costs in all periods, calculated by Coeus from data entered in the budget.
- **Indirect Cost:** Total of indirect costs in all periods, calculated by Coeus from data entered in the budget.
- **Underrecovery:** Not used at UC.
- **Cost Sharing:** Total of cost sharing in all periods, calculated by Coeus from data entered in the budget.
- **Proposal Hierarchy:** An icon that shows the proposal's status in a hierarchy.

Budget Summary Tab: Optionally Editable Fields

If you create a detailed budget, the Summary budget fields will contain totals entered by Coeus, which are then read-only: you cannot modify the contents of these fields.


Alternatively, users can directly enter period budget total data into the fields instead of creating detailed period budgets. This practice can be useful when sponsors do not require any budget details at the time of submission, but still require the anticipated budget total to appear on the SF 424 R&R.

Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Jul-2010	30-Jun-2011	12.0	\$.00	\$.00	\$.00	\$.00	\$.00
2	01-Jul-2011	30-Jun-2012	12.0	\$.00	\$.00	\$.00	\$.00	\$.00
3	01-Jul-2012	30-Jun-2013	12.0	\$.00	\$.00	\$.00	\$.00	\$.00

- **Start Date:** Budget period start date
- **End Date:** Budget period end date
- **No. of Months:** Number of months in budget period
- **Total Cost:** Budget period total costs to sponsor (direct + indirect)
- **Direct Cost:** Budget period direct cost total
- **Indirect Cost:** Budget period indirect cost total
- **Cost Sharing:** Budget period cost sharing total
- **Underrecovery:** Not used at UC at this time

Adjusting the Budget Period Boundaries

The Coeus default creates 12-month budget periods, but you can adjust the number of periods and the number of months in each period as needed to respond to sponsor requirements. See the section on non-default budget periods for tips on those budgets.

1. Open the proposal in modify mode.
2. On the PROPOSAL tab of the PROPOSAL DETAILS screen revise the entries in the **Start Date** or **End Date** field (or both) if needed.
3. Click the **Save** icon  or select **File > Save**.
4. Open the budget and select the budget version to adjust. Click **Modify**.
5. On the budget SUMMARY tab change the entry in the **Start Date** or **End Date** field or both so that the dates agree with those you entered in step 2 for PROPOSAL DETAILS.
6. Select **Budget Periods > Adjust Period Boundaries**. The DEFINE PERIODS window opens.

Period	Start Date	End Date
1	01/01/2009	31-Dec-2009
2	01-Jan-2010	31-Dec-2010
3	01-Jan-2011	31-Dec-2011

7. Use the buttons for the following actions:

- Add** — Add a period at the end of the list.
- Insert** — Insert a period before the selected period. The selected period has the pointing finger icon to the left and is highlighted in yellow. To select a period, click in the row.
- Delete** — Delete the selected period.
- Default** — Sync to the default 12-month periods defined by the **Start Date** and **End Date** on the SUMMARY tab.



TIP "Default" is the most efficient way to quickly synchronize the budget periods to 12 month increments based on the updated Start and End dates input on the Budget Summary tab.


- Click in the **Start Date** or **End Date** field and enter or revise the date in **mm/dd/yyyy** format.
- Click **OK** to save changes or **Cancel** to take no action. Any changes are reflected in the grid at the bottom of the SUMMARY tab.
- A prompt appears to synchronize the proposal rates with the currently maintained rates.

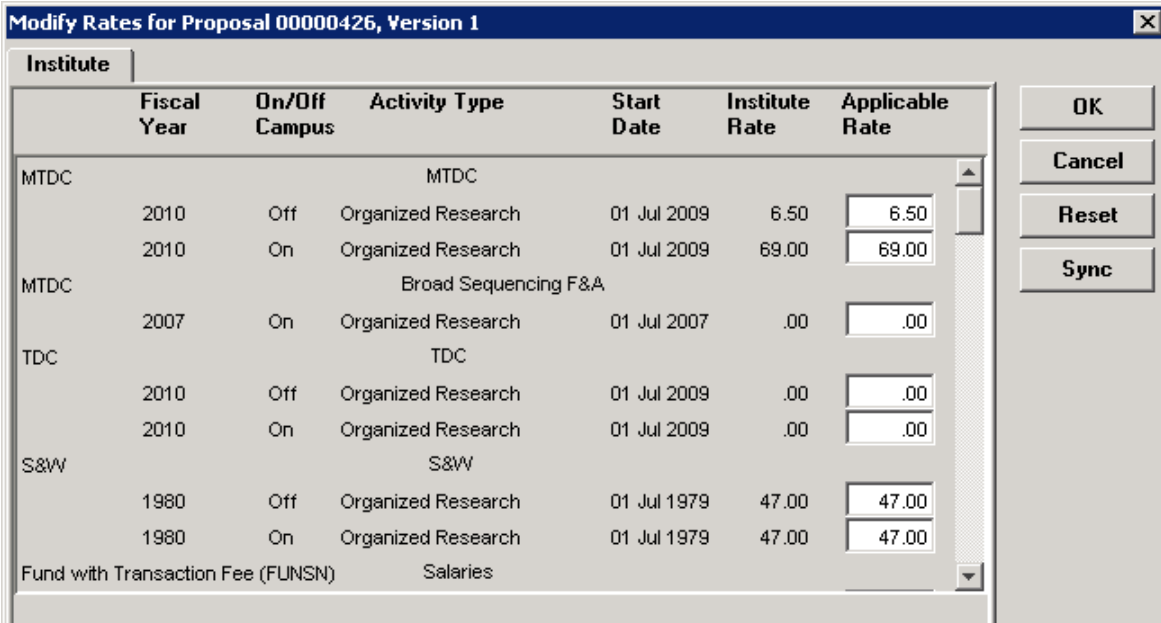
- Click **Yes** to have the current rates applied to the rates table and calculated.
- Click **No** if updated rates are not appropriate (this is rare); or if you intend to manually edit and sync the rates at a later time.

Verifying the Proposal Rates

The proposal rates table should be synchronized with the Institute rates before any adjustments are made. (A newly generated proposal rate table is most likely valid, but an older proposal record, or when the budget period boundaries have been adjusted, may have old rates that require synchronizing.)

Syncing the Proposal Rates to the Institute Rates

1. Click the **Maintain Rates for the Proposal** icon  or select **Edit > Rates....** The MODIFY RATES window opens.




Institute	Fiscal Year	On/Off Campus	Activity Type	Start Date	Institute Rate	Applicable Rate
MTDC			MTDC			
	2010	Off	Organized Research	01 Jul 2009	6.50	6.50
	2010	On	Organized Research	01 Jul 2009	69.00	69.00
MTDC			Broad Sequencing F&A			
	2007	On	Organized Research	01 Jul 2007	.00	.00
TDC			TDC			
	2010	Off	Organized Research	01 Jul 2009	.00	.00
	2010	On	Organized Research	01 Jul 2009	.00	.00
S&W			S&W			
	1980	Off	Organized Research	01 Jul 1979	47.00	47.00
	1980	On	Organized Research	01 Jul 1979	47.00	47.00
Fund with Transaction Fee (FUNSN)			Salaries			

2. Click **Sync**. A verification message opens: "Do you want to Sync Proposal rates with the current Institute rates?"
3. Click **Yes**. The message window closes and focus returns to the MODIFY RATES window.
4. Click **OK**. A verification message opens: "Saving will entail recalculation of the budget. Continue?"
5. Click **Yes**. The MODIFY RATES window closes and the budget is recalculated.

Adjusting the Proposal Rates

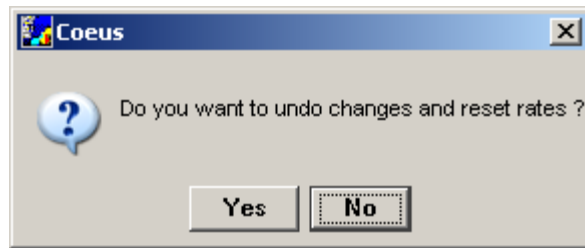
If you change a rate, change it for each relevant fiscal year, both on and off campus.

1. Click the **Maintain Rates for the Proposal** icon  or select **Edit > Rates....** The MODIFY RATES window opens (see above).
2. Change a rate by clicking in the appropriate **Applicable Rate** field and entering the new rate.
3. Click **OK**. A verification message opens: "Saving will entail recalculation of the budget. Continue?"
4. Click **Yes**. The MODIFY RATES window closes and the budget is recalculated.

Returning to Default Rates

To return to the default rates, open the MODIFY RATES window and click **Reset**.

1. A verification message opens to confirm you want to undo changes, whether you have made changes or not.
2. Click **Yes**. The message window closes and focus returns to the Modify Rates window.
3. Click **OK**. A verification message opens: "Saving will entail recalculation of the budget. Continue?"
4. Click **Yes**. The MODIFY RATES window closes and the budget is recalculated.



Creating the Period 1 Budget

Budgets are defined by periods. Start by creating the budget for the first period, which you populate with line items that will recur in every period. Coeus uses Period 1 as a basis to calculate amounts for future periods, but unique expenses can be inserted in any budget period once they are generated.

To create the budget for Period 1, enter line items for personnel salary and non-personnel costs.

Line	CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date
1				0.00	\$0.00	01-Jul-2010	30-Jun-2011

Adding Personnel Line Items

Adding personnel to the budget is a two-step process:

1. Create the Budget Persons List - a list of people who might be involved in the project, and
2. Create salary line items in the budget and add names from the Budget Persons list to the line items (see

About the Budget Persons List

Several line items in the budget have to do with salaries for the faculty and staff who will be paid from the award funds. Before these line items can be included in the budget, the people must be added to the proposal.


All project personnel are included in the BUDGET PERSONS LIST window. Coeus starts populating it for you by adding the names you entered in the INVESTIGATORS and KEY PERSONS tabs of the PROPOSAL DETAILS screen. You can add other personnel as necessary. In addition, some participants do not need to be named. You use the TBA placeholders to include them in the budget.

Persons in this list are included in the budget only when you add them to line items. They do not become part of the budget just by adding them to the Budget Persons list, so you can add anyone you think might be needed at some point in the project.

There are three (3) methods of adding to the Budget Persons List:

- **Find Person** accesses the Coeus Person records. These people are UC employees, affiliates, students, etc. The person records are automatically maintained and updated by a refresh from UC's HR database. Additionally, SRS ERA can manually create person records to support short-term requirements. Email Coeus@uc.edu to have a record added.
- **Find Rolodex** accesses the Coeus Rolodex. This search method allows entering external people (non-personnel) to the budget and to publish their names in proposal budget forms.
- **Add TBA** accesses the list of frequently used "to be announced" personnel types.

Creating the Budget Persons List

- From the PERIOD 1 tab Click the **Budget Persons** icon  or select **Edit > Persons....** The BUDGET PERSONS window opens, with names from the INVESTIGATORS and KEY PERSONS tabs listed.

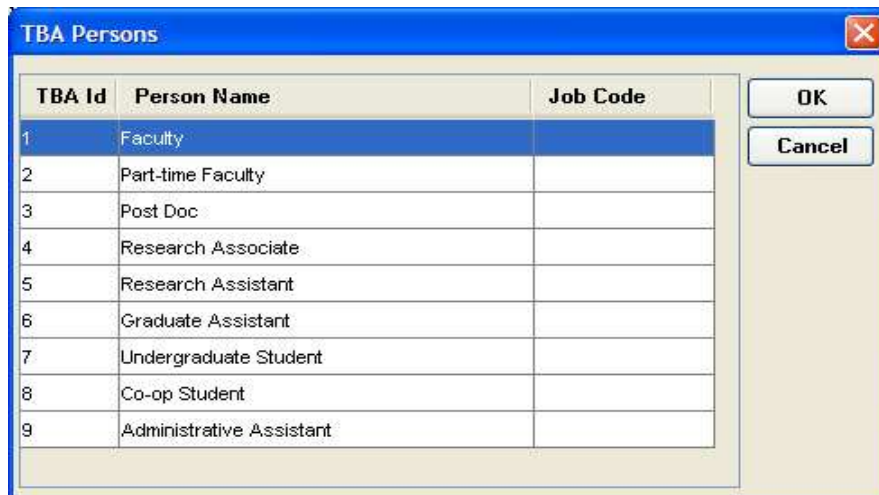


Name	Job Code	Appointment Type	Eff Date	Calc Base	Anniv Date
Bradley Cooper	JOBCDE	REG EMPLOYEE	01-Apr-2012		\$.00
Elvis Presley	JOBCDE	REG EMPLOYEE	01-Apr-2012		\$.00
Mick Jagger	JOBCDE	REG EMPLOYEE	01-Apr-2012		\$.00

- Add other named personnel to the list.
 - Click **Find Person**. The PERSON SEARCH window opens.
 - Enter search criteria. You can search for more than one person at a time by entering criteria in separate rows.
 - Click **Find**. The PERSON SEARCH RESULT tab opens, listing all results that meet your criteria.

Note: Results are listed alphabetically. All results in upper case are listed first, then those in mixed case.

- Click a name to select, or **Ctrl+click** (Macintosh use **Command+click**) to select multiple names.
 - Click **OK**. The PERSON SEARCH window closes, and the focus returns to the BUDGET PERSONS window, which now contains the names you added.
- Add placeholders for any new hires or personnel who do not need to be named.
 - Click **Add TBA**.
 - The TBA PERSONS window opens listing the maintained To Be Announced placeholders.
 - From the list, select placeholders that reflect the positions needed.
 - Click **OK**. The TBA PERSONS window closes, and focus returns to the BUDGET PERSONS window.



TBA Id	Person Name	Job Code
1	Faculty	
2	Part-time Faculty	
3	Post Doc	
4	Research Associate	
5	Research Assistant	
6	Graduate Assistant	
7	Undergraduate Student	
8	Co-op Student	
9	Administrative Assistant	

4. Do the following for each budget person row in the list:

- Accept the suggested job code, or make an entry in the **Job Code** field. You can enter something meaningful to you in the field, such as **TBA1**. The entry can be a single character.
- Check the **Appointment Type** field to confirm the appointment is correct for this proposal. To change it, click in the **Appointment Type** field to display the drop-down list. The types are:


Appointment Type	Meaning	Salary Calculation Base
9M DURATION	Academic year appointment	9 Month base salary
10M DURATION	Supplement to academic year appointment	10 Month base salary
11M DURATION	Supplement to academic year appointment	11 Month base salary
12M DURATION	Staff	12 Month base or annual salary
REG EMPLOYEE	Regular employee	12 Month base or annual salary
SUM EMPLOYEE	Summer appointment	3 Month base salary
TMP EMPLOYEE	Temporary appointment	1 Month base salary

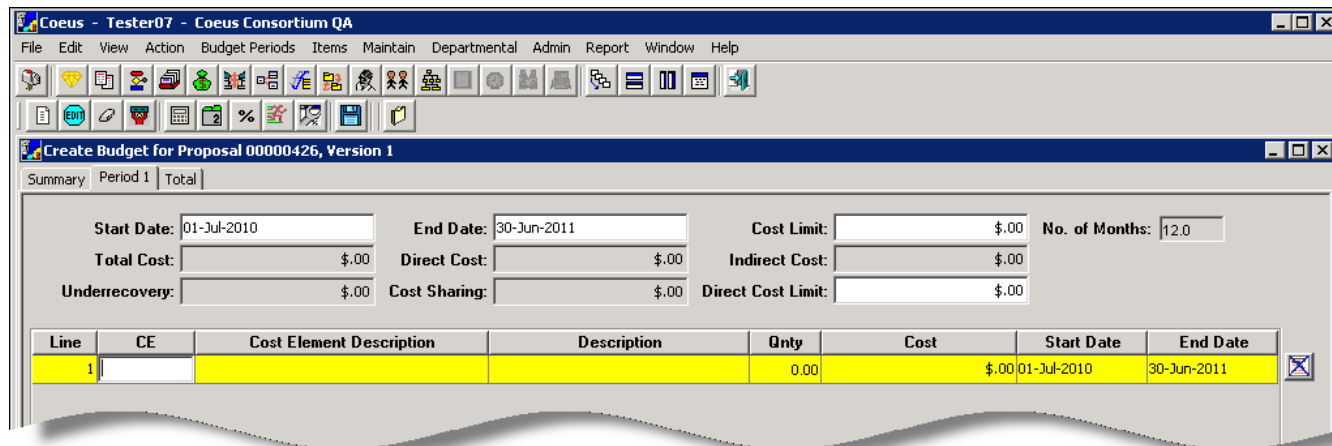
- Enter the person's base salary in the **Calc Base** field. This is the annual salary as of the date of the last increase.
- Enter the date of the person's last salary increase in the **Eff Date** field. This field defaults to the start date of the proposal, but more precise amounts are obtained when it is accurate.
- Enter the **Anniversary Date** for NIH proposals where salary is over the cap. Coeus will still use the rates table for the relevant inflation percentage (by personnel category for the selected salary type/cost element). But the individual anniversary dates will be used in the calculation instead of the salary category dates displayed in the table. Please contact coeus@uc.edu for detailed instructions on using Anniversary Date for a specific proposal.

5. Click **OK**. The BUDGET PERSONS window closes.

Creating Personnel Line Items and Adding Names

Do this for each personnel line item:

- From the PERIOD 1 tab of the CREATE BUDGET screen, click the **Add Line Item** icon , select **Items > Add Line Item...**, or press **Ctrl+A** (Mac users press **Command+A**). A blank line item, highlighted in yellow, is added at the end of the list.



- Double-click the **CE** field. The **COST ELEMENTS** window opens.

Cost Elements

Code: Description:

Code	Description
530900	Advertising and Development
533111	Alterations and Renovations
AWOHOF	Award Budget F&A Costs - Off Campus
AWOHON	Award Budget F&A Costs - On Campus
AWEBOF	Award Budget Fringe Costs - Off Campus
AWEBON	Award Budget Fringe Costs - On Campus
531400	Communications
530311	Computer Consulting Services
533101	Consultants
530200	Dept Operating Expenses
539000	Equipment less than \$5000 (subject to F&A)
549100	Equipment Capital -- value over \$5000

OK Cancel

- Click to select a salary cost element and click **OK**. The **COST ELEMENTS** window closes and focus returns to the **PERIOD 1** tab, and the selected cost element is entered in the line item.



TIP: Review and adjust Line Item Detail default settings **before** you add Personnel Budget Details. Double-click on the line item, or Menu path Item>Edit Detail to edit as needed. The line item detail settings cannot be changed once a Person is applied via the Personnel Budget Details process.

- Change the **Budget Category** – especially necessary for overriding default personnel cost elements to “Senior Personnel” so they appear in the Named Personnel section of sponsor budget forms, including the RR Budget. You may need to do this for Postdoctoral cost element to publish as the PI or Co-I.
- Change **On Campus** to **Off Campus**
- Uncheck **Apply Inflation** so the generated budget periods do not inflate.
- Uncheck **Submit Cost Sharing** so this line item’s cost share expense won’t submit on Grants.gov forms.
- Uncheck **Apply** box for overhead rates – which may only be relevant for special submissions

Line	CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date
1	FACFTFED	Faculty FT - Fed Fringe Rates		0.00	\$.00	01-Apr-2012	31-Mar-2013

Budget - Line Item Detail

Category: Senior Personnel On Campus Off Campus

Cost Elm: FACFTFED Faculty FT - Fed Fringe Rates

Start Date: 01-Apr-2012 End Date: 31-Mar-2013


Description:

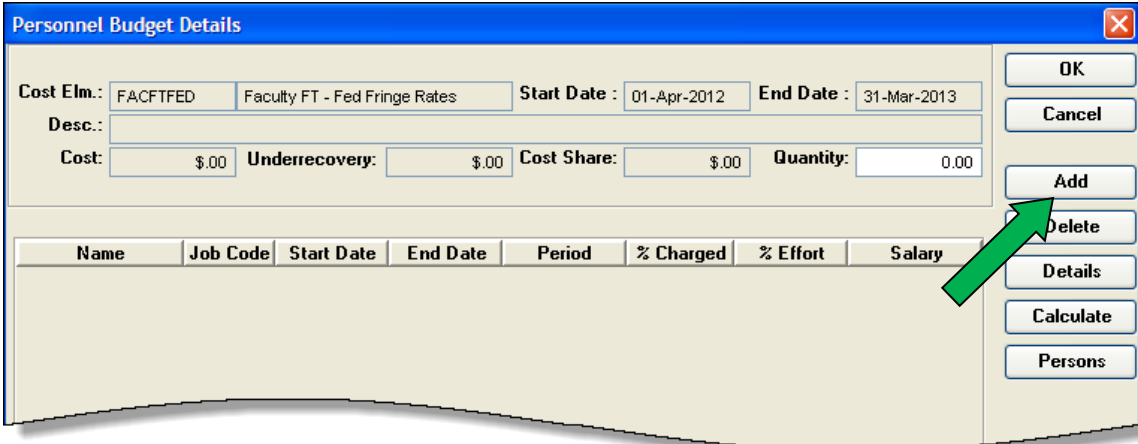
Cost: \$.00 Quantity: .00 Apply Inflation:

Cost Sharing: \$.00 **Submit Cost Sharing:** Underrecovery: \$.00

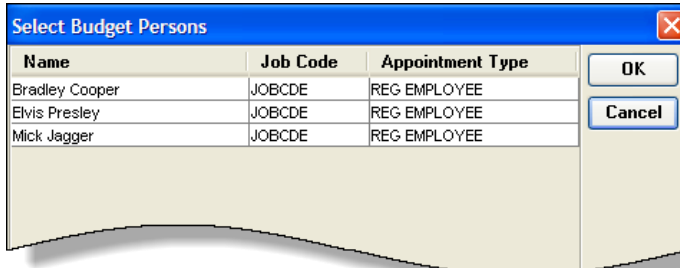
Rate Class	Rate Type	Apply	Cost	Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	\$.00	\$.00
Employee Benefits	Faculty Full Time (Federal)	<input checked="" type="checkbox"/>	\$.00	\$.00

OK Cancel Justify

4. With the line item still selected, click the **Personnel Budget for Line Item** icon  or select **Items > Personnel Budget....** The PERSONNEL BUDGET DETAILS window opens.



5. Click **Add**. The SELECT BUDGET PERSONS window opens.



Name	Job Code	Appointment Type
Bradley Cooper	JOBCDE	REG EMPLOYEE
Elvis Presley	JOBCDE	REG EMPLOYEE
Mick Jagger	JOBCDE	REG EMPLOYEE

6. Select the appropriate person(s) from the list.
 You can select multiple names for a line item (**Ctrl**+click; Mac users **Command**+click) if those individuals are all in the same category. For example, you can select three Faculty members who are to be budgeted for the line item **Faculty FT – Fed Fringe Rates**. If you do select multiple names, the PERSONNEL BUDGET DETAILS window will display each on a separate line.
7. Click **OK**. The SELECT BUDGET PERSONS window closes, and the person(s) selected appear in lines in the PERSONNEL BUDGET DETAILS window, ready for their effort definition for this budget period.

Personnel Budget Details

Cost Elm.: FACFTFED Faculty FT - Fed Fringe Rates Start Date : 01-Apr-2012 End Date : 31-Mar-2013

Desc.:

Cost: \$.00 Underrecovery: \$.00 Cost Share: \$.00 Quantity: 1.00

Name	Job Code	Start Date	End Date	Period	% Charged	% Effort	Salary
Elvis Presley	JOBCDE	01-Apr-2012	31-Mar-2013	Cycle	.00	.00	\$.00

Rate Class	Rate Type	Apply	Cost	Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	\$.00	\$.00
Employee Benefits	Faculty Full Time (Federal)	<input checked="" type="checkbox"/>	\$.00	\$.00

Buttons: OK, Cancel, Add, Delete, Details, Calculate, Persons

8. Make entries or adjustments to fields in the PERSONNEL BUDGET DETAILS window:

- Start Date** and **End Date** — Click in the field to change one of these dates to compensate for such occurrences as vacation eligible time or a late start on the project. Change to the appropriate dates for faculty summer period (that is, June, July, or August).
- Period** — Select the appropriate appointment type from the drop-down list. The types are:

Appointment Type	Description
Academic	The nine-month academic year
Calendar	The 12-month calendar year
Cycle	A 12-month period
Summer	The three-month summer period

- % Charged** — Click in the field to enter the percentage of the person's salary to be charged to the project. (This field cannot be greater than **% Effort**.) Coeus calculates the salary and stores it in the **Salary** field.
- % Effort** — Click in the field to enter the percentage of the work week this person will charge to the project.
- Calculate**: click the calculate button to display the applicable MTDC and/or Fringe rates in the lower portion of the window.

9. Click **OK**. The PERSONNEL BUDGET DETAILS window closes and focus returns to the PERIOD 1 tab.

10. Click the **Save** icon  or select **File > Save**.

Greater-than or less-than 12 month budget periods

It is advised to generate these unusual budget periods **before** applying certain budget expense details. While this means additional steps to manually populate the expenses in each budget period, it is necessary for accurate personnel effort and other budgeting decisions that should be made by the user. If you choose to add personnel detail prior to generating budget periods, you must still review each Personnel Budget Detail window for each budget person to verify and/or modify.

For Personnel expenses:

- Use the standard instructions to select cost elements and maintain the budget person details as detailed previously in this guide.

- Be especially mindful to define the **Start Date** and **End Date** for each person as it relates to *this* budget period.
- You may need to Add and define multiple detail lines for each person to expense them to Academic or Summer periods if the budget period is especially long. The figure below describes an 18 month budget period: two (2) lines were needed to capture the Academic months.

Summary	Period 1	Period 2	Total
Start Date:	7/01/2009	End Date:	31-Dec-2010
Cost Limit:			\$.00
No. of Months:	18.0		
Total Cost:	\$604,587.01	Direct Cost:	\$357,743.79
Indirect Cost:	\$246,843.22		
Underrecovery:	\$.00	Cost Sharing:	\$.00
Direct Cost Limit:	\$.00		

Line	CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date
------	----	--------------------------	-------------	-----	------	------------	----------

Personnel Budget Details

Cost Elm.: 400025 Faculty Salaries Tenured - On **Start Date :** 01-Jul-2009 **End Date :** 31-Dec-2010

Desc.: Seuss

Cost: \$11,760.28 **Underrecovery:** \$.00 **Cost Share:** \$.00 **Quantity:** 1.00

Name	Job Code	Start Date	End Date	Period	% Charged	% Effort	Salary
Doctor Seuss	SL017	01-Sep-2009	31-May-2010	Academic	10.00	10.00	\$8,085.28
Doctor Seuss	SL017	01-Sep-2010	31-Dec-2010	Academic	10.00	10.00	\$3,675.00
Doctor Seuss	SL017	01-Jul-2009	31-Dec-2010	Cycle	.00	.00	\$.00

Default start/end matches the full 18 months!
Be sure to review and update the Start Date/End Date and Period flag.

For Non-Personnel Expenses:

- You can enter non-personnel line item expenses prior to generating budget periods.
 - Costs will be inflated once per generated budget period (if the “apply inflation” box is checked). The inflation may be appropriate to budgets with greater than 12 month periods, but not for periods less than 12-month– like quarterly (3 month) budgets. Therefore, it is advised to review the costs generated in each budget period for appropriateness and make any necessary changes. It may be best to manually add these line items and expenses to each budget period.
 - Change the **Budget Category**– the default category is mapped to printed forms. If a particular expense needs to be recategorized for a special submission, do so here.
 - Change **On Campus** to **Off Campus** by clicking the radial button. Changing campus status will impact overhead rates applied.
 - Uncheck **Apply Inflation** before generating later periods or using Apply to Later Periods so this line item expense will not inflate.
 - Uncheck **Submit Cost Sharing** so this line item’s cost share expense won’t submit on Grants.gov forms.
 - Uncheck **Apply** box for overhead rates – which may only be relevant for special submissions.

Budget - Line Item Detail

Category: **Materials** On Campus Off Campus

Cost Elm: 420226 Materials and Services

Start Date: 01-Jul-2010 End Date: 30-Jun-2011

Description:

Cost: \$0.00 Quantity: .00 Apply Inflation:

Cost Sharing: \$0.00 **Submit Cost Sharing:** Underrecovery: \$0.00


Rate Class	Rate Type	Apply	Cost	Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	\$0.00	\$0.00

Adding Non-Personnel Line Items

Non-personnel line items are for expenses such as equipment and travel. You enter the costs directly in the line item or the LINE ITEM DETAIL window.

Note: Major equipment (defined as \$5,000 or more, durable, and directly related to research) must be budgeted using an individual line item for each piece of equipment. A description is required in the **Description** field, and the expense must be justified. This requirement is for Grants.gov submissions and is good practice for all budgets.

Do this for each non-personnel direct-cost line item:

1. From the PERIOD 1 tab of the CREATE BUDGET screen, click the **Add Line Item** icon , select **Items > Add Line Item...**, or press **Ctrl+A** (Mac users press **Command+A**). A blank line item, highlighted in yellow, is added at the end of the list.
2. Double-click the **CE** field. The COST ELEMENTS window opens.
3. Select the appropriate cost element and click **OK** or press the **Enter** key. The COST ELEMENTS window closes and focus returns to the PERIOD 1 tab.
4. Double-click the **Description** field. THE BUDGET – LINE ITEM DETAIL window opens.

Budget - Line Item Detail

Category: **Materials** On Campus Off Campus

Cost Elm: 420226 Materials and Services

Start Date: 01-Jul-2010 End Date: 30-Jun-2011

Description:



Cost: \$0.00 Quantity: .00 Apply Inflation:

Cost Sharing: \$0.00 **Submit Cost Sharing:** Underrecovery: \$0.00

Rate Class	Rate Type	Apply	Cost	Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	\$0.00	\$0.00

5. Make entries in these fields:


- **Category** — Change the category, if necessary.
- **Description** — A description of the line item. This is required for equipment, but it can be used for additional information for all non-equipment line items. This field is seen only by Coeus users for line items that are not for equipment.

- **Cost** — The total cost for the line item. Costs can be entered to the penny. They are rounded to the nearest dollar when printed to most forms, but the value entered is used in calculations.
- **Quantity** — This field can be left blank, since it is for your records only. This value does not affect the line item. That is, the cost is not multiplied by the quantity to calculate the total cost of the line item.
- **Apply Inflation** (checkbox) — Checked to apply by default on most cost elements to increase costs in later periods. This box can be unchecked so inflation will not be applied to this item when periods are generated.
- **Cost Sharing** — If applicable, enter the amount to be funded by another source.
- **Submit Cost Sharing** — Leave this box checked if the cost share expense should be published on the Grants.gov forms. Uncheck the box if this line item's expense should not be included on the Grants.gov forms.
- **Justification** — Click **Justify** to display this field. Enter notes about the justification for this line item. After you enter a note in this field the icon to the right of the line item changes from  to  indicating that a justification for the line item has been written.

Justification

Enter notes here regarding this line item to use later to compose the budget justification

Note: The **Justification** field is useful for making notes that can become the basis of your Budget Justification narrative.



6. Click **OK**. THE BUDGET – LINE ITEM DETAIL window closes, and focus returns to the PERIOD 1 tab.
7. Click the **Save** icon  or select **File > Save**.

Adding Subaward Line Items in the budget

To include subaward expenses in the budget, multiple line items may be required. Per A-21 Cost Principles, most subawards are subject to F&A for only the first \$25,000 of the entire award. The remaining amount over \$25,000 is not subject to F&A. Cost elements are available to support this entry requirement.

Note: If you are adding subaward line items for an NIH proposal, see [Special NIH Subcontract Instructions](#), page 24.

Do this for each subaward:

1. From the PERIOD 1 tab of the CREATE BUDGET screen, click the **Add Line Item** icon , select **Items > Add Line Item...**, or press **Ctrl+A** (Mac users press **Command+A**). A blank line item, highlighted in yellow, is added at the end of the list.
2. Double-click the **CE** field. The COST ELEMENTS window opens.
3. Select **532201 Subawards Direct – Subject to F&A** and click **OK**. The COST ELEMENTS window closes and focus returns to the PERIOD 1 tab.
4. Click the **Description** field and enter the name of the subawardee.
5. Click the **Cost** field and enter the cost of the subaward that is subject to F&A (up to \$25,000).
6. If the subaward is for \$25,000 or less, go to step 10. If the subcontract is for more than \$25,000, add another line item, (See step 1.)
7. Double-click the **CE** field and select **532202 Subawards Direct – No F&A** and click **OK**. The COST ELEMENTS window closes and focus returns to the PERIOD 1 tab.
8. Click the **Description** field and enter the name of the subawardee.
9. Click the **Cost** field and enter the amount by which the subaward exceeds \$25,000.
10. Click the **Save** icon  or select **File > Save**.

Upload Subaward Budgets Files

When a sponsor requires including a Subaward Budget form in addition to your primary applicant Grants.gov budget form, users should extract an Adobe Subaward Budget from the sponsor's Adobe form package posted at Grants.gov. Locate the opportunity at www.grants.gov, and use one of the search options available under the "Find grant opportunities." Grants.gov and Adobe still recommend to **only use Adobe Reader**, not *Acrobat*, when working in any of the Grants.gov Adobe forms to avoid potential data corruption.



Subaward Budget Forms

The subaward budget form extracted from the Grants.gov Adobe package is identical in design, detail, and input requirements to the primary applicant budget used for submission (e.g. RR Budget, Fed-Non-Fed Budget, and PHS Training Budget). While the RR Subaward Budget Form name is currently Version 1-2 (as shown in the Grants.gov Forms window figure below) the extracted budget file name includes "1.1" in the title – which is correct when the RR Budget Form (primary applicant budget) is at version 1-1. The "1.2" in the Subaward Budget Form name refers to the version of the *attachment page* where users extract a blank budget file. You can confirm the version number of submission budget by looking at the budget form name and version in the Grants.gov window > Forms tab.

Figure 1: Grants.gov > Forms window after selecting to "Include" two of the four Optional forms; RR Budget and RR Subaward Budget

Form Name	Mandatory	Include	Availability
PHS398 Checklist V1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
PHS398 Cover Page Supplement V1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
PHS398 Research Plan V1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
RR Budget V1-1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Available
RR Key Person Expanded V1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
RR Other Projects V1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
RR Performance Site V1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
RR SF 424 V1-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
RR SubAward Budget V1.2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Available
PHS398 Cover Letter V1-1	<input type="checkbox"/>	<input type="checkbox"/>	Available
PHS398 Modular Budget V1-1	<input type="checkbox"/>	<input type="checkbox"/>	Available

Selected 2 out of 4 Available Optional Forms

Include the Subaward Budget Form in your Coeus submission

1. Select the Subaward form in the Grants.gov Submission window:
 - a. From the PROPOSAL DETAILS screen select **Action > Grants.gov**. The GRANTS GOV SUBMISSION DETAILS window opens.
 - b. Open the FORMS tab and select to "Include" the "Subaward Budget."
 - c. Click the **Save** button to add this optional form to be included with this submission. (Once saved, the form will be moved from the bottom of the list to in alphabetic order by the "Include" list and be included in the "Selected out of Optional" count at the bottom of the window.
 - d. Close the GRANTS GOV SUBMISSION DETAILS window.
2. Locate the opportunity at Grants.gov.
3. Extract the Subaward form and save the file to your desktop.

Figure 2: Adobe Form Package after selecting the R&R Subaward Budget Attachment Form and "moved" for Submission

Application Filing Name: [Redacted]

Mandatory Documents
SF424 (R & R)

Optional Documents
RR Fed/NonFed Budget
Research And Related Subaward Budget (Total Fed
Research And Related Other Project Information
Research And Related Budget
Research And Related Senior/Key Person Profile
Research & Related Personal Data
Project/Performance Site Location(s)

Move Form to Complete =>
Move Form to Delete <=<
Move Form to Submission List =>
Move Form to Delete <=<

Mandatory Documents for Submission

Optional Documents for Submission
R and R Subaward Budget Attachment(s) Form

Open Form
Open Form

Instructions: [Redacted]

Figure 3: R&R Subaward Budget Attachment form: Click to extract the RR Budget –automatically the File Name field is prepared with the name “RR_Budget_A-V.1.pdf” – you can alter this name prior to saving (just don’t delete the “.pdf” file extension).

R&R SUBAWARD BUDGET ATTACHMENT(S) FORM

Instructions: On this form, you will attach the R&R Subaward Budget files for your grant application. Complete the subaward accordance with the R&R budget instructions. Please remember that any files you attach must be a PDF document.

Click here to extract the R&R Subaward Budget Attachment

My Network Places

File name: RR_Budget_A-V.1.pdf

Save as type: All Files (*.*)

Save
Cancel

- The extracted budget file necessary, marked as “Subaward/Consortium” for your subawardee, must be manually completed following all the same sponsor rules and requirements as the primary applicant budget. Please reference your sponsor’s submission guidelines for specific details. Once the form is completed, the file can be uploaded in the Coeus Premium Budget. See next section.

Check Form for Errors Save

RESEARCH & RELATED BUDGET - SECTION A & B, BUDGET P

* ORGANIZATIONAL DUNS: [Redacted]

* Budget Type: Project Subaward/Consortium

Enter name of Organization: [Redacted]

Delete Entry * Start Date: [Redacted]

A. Senior/Key Person

	Prefix	* First Name	Middle Name	* Last Name	Suffix	* Project Role	Base Salary (\$)	Cal. Months
1.	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	PD/PI	[Redacted]	[Redacted]

Uploading and Translating Subaward Files

Do this for every detailed subaward budget file required for your proposal:



BEFORE YOU UPLOAD! Be certain that each subaward budget justification has a **unique name** with no spaces or special characters– these are the files uploaded in the PDF subaward form. Note: If everyone uses the same “budget_justification.pdf” name, your submission will **error** at Grants.gov!

K. * Budget Justification
(Only attach one file.)

1. From the MODIFY BUDGET FOR PROPOSAL screen select **Edit > Sub Award**. The SUB AWARD BUDGET window opens.
2. Click **Add**. A file browser window opens.

3. Find the completed Adobe subaward budget file, select it, and click **Open**. The file browser closes and the focus returns to the SUB AWARD BUDGET window. A line is generated to identify this upload.

4. Double-click in the **Organization Name** field and enter the subawardee’s name – or other unique name to identify this upload. This entry will be used as the file name **so type this entry with no spaces or special characters** otherwise there will be ERRORS with Grants.gov validations.

5. Click **Translate**. The Adobe file will be translated to XML for submission with your Coeus application. Note the **Form Name**, **Status** and **Attachments** fields have information about the translated file.
 - a. **Form Name** is the budget form style (e.g. RR Budget, Fed-Non-Fed, PHS Training)
 - b. **Attachments** is the Coeus ID for this upload,
 - c. **PDF File** is the file name of the uploaded subaward budget PDF file.
 - d. **Status** indicates if the file was successfully translated or if there were errors.
 - i. Errors indicate that your PDF file may have become corrupted.
 - ii. The status *must* state that XML generated successfully to submit properly via Grants.gov.
 - iii. Refer to the instructions (ahead) to replace the subaward file for this Organization line.
6. Click **OK** to close the window and return to the Budget. Note: clicking OK will automatically translate the uploaded files before the window closes.
7. Repeat the upload steps for any additional Subawards to transmit with your submission.

Sub Award Budget (Version Number: 1)

Proposal Number: 00000878

No	Organization Name	Form Name	PDF	XML
1	RhymingLit_PI_Seuss	RR Budget V1-1	✓	✓

Comments: [Text Box]

Details

Details

Attachments: RR_Budget_P4.optionalFile1265819895247

PDF File: Oct11-Sept14_RR_Budget_A-V1.1.pdf

PDF Last Updated: 10-Feb-2010 12:06:40 PM by Hanlon, Rosemary

XML Last Updated: 10-Feb-2010 12:06:40 PM by Hanlon, Rosemary

Sub Award Last Updated: 10-Feb-2010 12:06:40 PM by Hanlon, Rosemary

Namespace: http://apply.grants.gov/forms/RR_Budget-V1.1

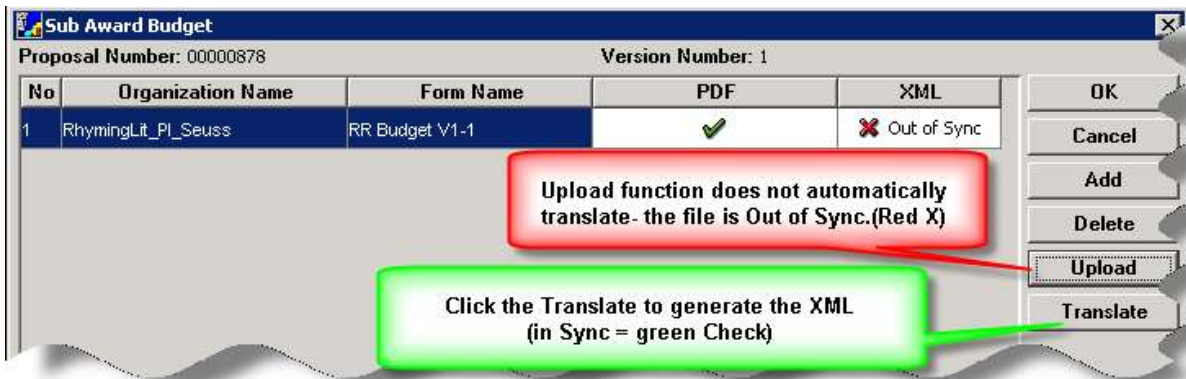
Status: XML Generated successfully

Using the Subaward Comment box

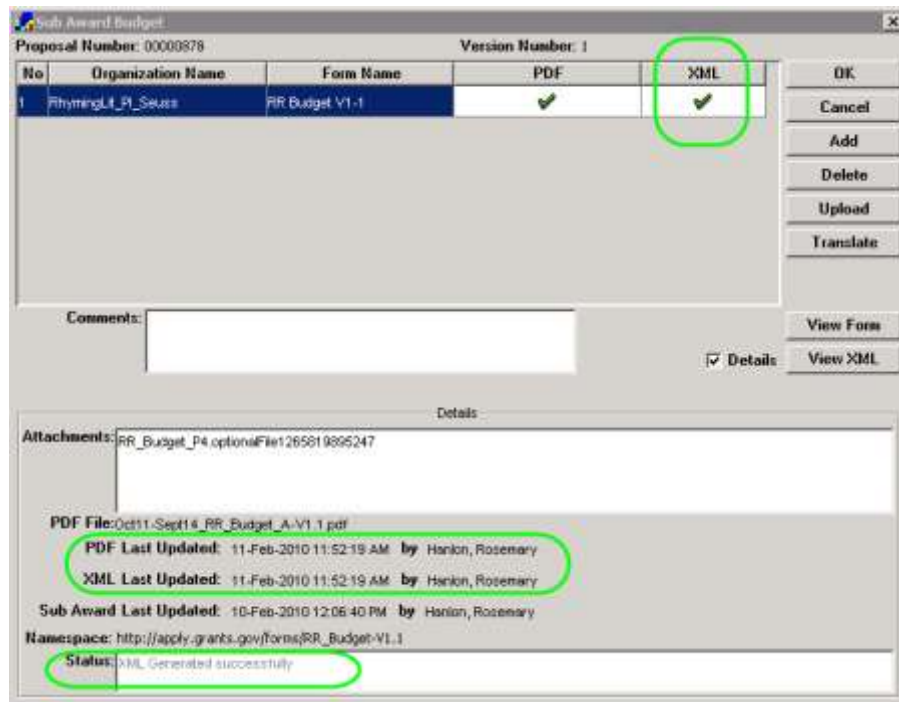
- Use the Comments box to insert notes about the uploaded files.
- Deselect the **Details** check box to minimize the translation details pane in the SUB AWARD BUDGET window.

Replacing an Uploaded Subaward File

1. From MODIFY BUDGET FOR PROPOSAL select **Edit > Sub Award**. The SUB AWARD BUDGET window opens.
2. Select the line for the subawardee whose Adobe budget file you are going to replace.
3. Click **Upload**. A file browser window opens.
4. Find the Adobe budget file, select it, and click **Open**. The file browser closes and focus returns to the Sub AWARD BUDGET window. The replaced file's **XML** status is now Out of Sync, indicated by the red X in that column.



5. Click **Translate**. The Adobe file is translated to XML. The XML column will display the green check to indicate it is in sync; the **last updated** time stamps will change to indicate the transaction time and the name of the user that generated this XML successfully.



Viewing the uploaded Subaward Form from Coeus

- Click **View Form**. The file displays in new browser window.

Once translated, you can view the .XML file in a browser window.

- Click **View XML**. The file displays in a browser window.



You *cannot* modify the Subaward files already uploaded to Coeus from the **View Form** preview window. As with all uploaded files in Coeus, the document is presented in a separate browser window as a PDF file. While this subaward document may appear to be a fully functioning PDF fill-able form, any changes you make will NOT be saved to your file already in Coeus! ***To make updates to the Subaward budget file or its Justification, return to the original Adobe Subaward file to make and save changes, and then re-upload that file to Coeus.***

Special NIH Subcontract Instructions

Select the correct cost elements for subaward F&A expenses to enable the Coeus modular budget sync feature to work effectively for NIH modular budget submissions. Isolating the subaward indirect expense entries by selecting the subawardee's F&A types in your budget gives Coeus the data needed to sync to the NIH modular budget screen and submission forms. The four direct cost types are listed here, and two examples follow.

Code	Description	Cost Type
532201	Subawards Direct – Subject to F&A (first \$25,000)	Direct
532202	Subawards Direct – Not Subject to F&A	Direct
SUBFAGT	Subawards F&A – no F&A	Indirect
SUBFALT	Subawards F&A – Subject to F&A	Indirect

Example 1

The subaward is \$75,000 annual direct costs plus 65% F&A, or \$48,750, for a total of \$123,750.

This is the common situation in which the first period costs of the subcontract exceed \$25,000. Three line items are needed in the first period, and two in the following periods.

Period 1:

532201	Subawards Direct -- subject to F&A	First 25K of subawardee direct costs	0.00	\$25,000.00
532202	Subawards Direct-- not subject to F&A	Remainder of direct costs	0.00	\$50,000.00
SUBFAGT	Subawards F&A - No F&A	Subawardee F&A costs	0.00	\$48,750.00

Period 2:

532202	Subawards Direct-- not subject to F&A	Period 2 subawardee direct costs	0.00	\$75,000.00
SUBFAGT	Subawards F&A - No F&A	Subawardee F&A costs	0.00	\$48,750.00

Period 3:

532202	Subawards Direct-- not subject to F&A	Period 3 subawardee direct costs	0.00	\$75,000.00
SUBFAGT	Subawards F&A - No F&A	Subawardee F&A costs	0.00	\$48,750.00

Example 2

The subaward is \$12,000 annual direct costs plus 65% F&A, or \$7,800, for a total of \$19,800.

In this example the subaward total is less than \$25,000. All costs incur Institute F&A. This is an uncommon situation in which two line items are needed in the first period and three in the second.

Ex. 2: Subaward \$12,000 annual direct costs + 65% F&A of \$7,800 = \$19,800 total.

Period 1:

532201	Subawards Direct -- subject to F&A	Less than 25K Period 1	0.00	\$12,000.00
SUBFALT	Subawards F&A - Subject to F&A	For syncing modular budget	0.00	\$7,800.00

Period 2:

532201	Subawards Direct -- subject to F&A	Total still less than 25K	0.00	\$5,200.00
532202	Subawards Direct-- not subject to F&A	Subawardee direct costs >25K	0.00	\$6,800.00
SUBFAGT	Subawards F&A - No F&A	For syncing modular budget	0.00	\$7,800.00

Budget Categories

A subset of the available cost elements (GLs) is used for proposal submission. As a result, many of the GLs you are accustomed to seeing in UC Flex are unavailable. Coeus groups the GLs into budget categories to support printing of sponsor forms. These categories are dependent on the individual sponsor's needs. Each available cost element has been assigned to a budget category based on UC use and sponsor definition. You can reset the budget category when needed to support unique budget submission requirements.

Viewing and Changing a Line Item Budget Category

1. Select the line item. When selected the line item is highlighted.
2. Select **Items > Edit Details...** or double-click the line item. The BUDGET – LINE ITEM DETAIL window opens.

The screenshot shows the 'Budget - Line Item Detail' window. On the left, there is a list of budget categories. The 'Materials' category is selected and highlighted in blue. The right side of the window contains several fields: 'On Campus' and 'Off Campus' radio buttons, a 'Date' field set to '30-Jun-2011', and a table for 'Cost' and 'Cost Sharing'. The 'Cost' field is set to '.00' and the 'Cost Sharing' field is set to '\$.00'. There are also buttons for 'OK', 'Cancel', and 'Justify'.

3. To change the category, click the **Category** drop-down list and make a selection.

Note: You cannot change a budget category if the line item has person details entered. To make that change, remove the person details, and then change the budget category, and re-enter the person details.

Viewing All Period Budget Categories

First Method

1. Select the tab for the budget period you want to view.
2. Select **View > Customize**. The CUSTOMIZE VIEW window opens.

The screenshot shows the 'Customize View' window. In the 'Views' section, the 'Grouped By Category' radio button is selected and circled in red. The 'Show Columns' section has several checkboxes checked: 'Cost Element', 'Cost Element Description', 'Line Item Description', 'Start Date', 'End Date', 'Cost', 'Quantity', and 'Category'. There are also buttons for 'OK', 'Cancel', and 'Apply'.

3. Select the **Grouped By Category** option button (circled above). Click **OK**.
4. The view in the period tab changes to look similar to this.

CE	Cost Element Description	Description	Start Date	End Date	Cost	Qty
Category: Other Personnel						
400450	Hourly Personnel - On		01-Sep-2010	31-Aug-2011	\$.00	1
Category: Other Professionals						
400365	Program Manager	abcd	01-Sep-2010	31-Aug-2011	\$.00	
400250	Administrative Staff - On	efgh	01-Sep-2010	31-Aug-2011	\$30,150.00	1
Category: Subcontracts						
420600	Subcontracts - Subject to MIT F&A	subcontractor name	01-Sep-2010	31-Aug-2011	\$25,000.00	
420620	Subcontracts - No MIT F&A	subcontractor name	01-Sep-2010	31-Aug-2011	\$3,750.00	
Category: Materials						
420800	Books		01-Sep-2010	31-Aug-2011	\$3,500.00	
Category: Senior Personnel						
400005	Summer Faculty - On	ijkl	01-Sep-2010	31-Aug-2011	\$206,000.00	1
400025	Faculty Salaries Tenured - On		01-Sep-2010	31-Aug-2011	\$.00	1

Line items are grouped by the category to which they will print on the budget forms. You cannot modify line items in this view.

Second Method

1. Select the tab for the budget period you want to view.
2. Select **View > Customize**. The CUSTOMIZE VIEW window opens.

3. Select the **Category** checkbox (circled above). Uncheck any unneeded columns (optional). Click **OK**.
4. The view in the period tab looks similar to this.

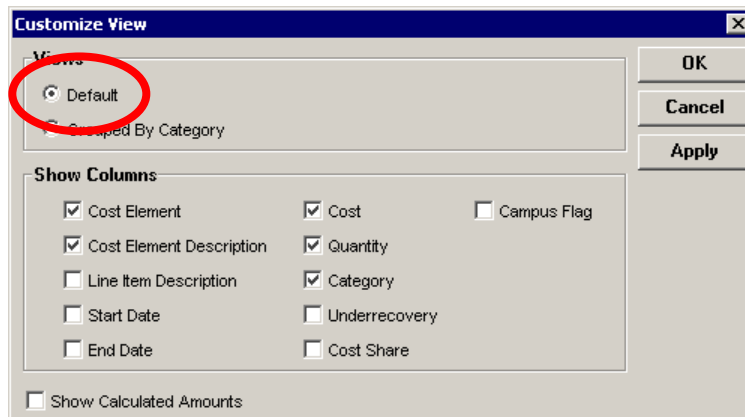
Line	CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date
1	FACTFED	Faculty FT - Fed Fringe Rates	Manning Effort	1.00	\$5,075.00	01-Mar-2011	29-Feb-2012
2	549100	Equipment, Capital -- value over \$5000	Sweet Machine	0.00	\$15,000.00	01-Mar-2011	29-Feb-2012
3	532000	Lab Animal Medicine	Medicine being tested	0.00	\$50,000.00	01-Mar-2011	29-Feb-2012
4	531900	Lab Expenses	Misc items for lab	0.00	\$141,389.06	01-Mar-2011	29-Feb-2012
5	530500	Travel - domestic	Sponsored required trip	0.00	\$10,000.00	01-Mar-2011	29-Feb-2012
6	532201	Subawards Direct -- subject to F&A	Less than 25K Period 1	0.00	\$12,000.00	01-Mar-2011	29-Feb-2012
7	SUBFALT	Subawards F&A - Subject to F&A	For syncing modular budget	0.00	\$7,800.00	01-Mar-2011	29-Feb-2012
8	532201	Subawards Direct -- subject to F&A	Total still less than 25K	0.00	\$5,200.00	01-Mar-2011	29-Feb-2012
9	532202	Subawards Direct -- not subject to F&A	Subawardee direct costs >25K	0.00	\$6,800.00	01-Mar-2011	29-Feb-2012
10	SUBFAGT	Subawards F&A - No F&A	For syncing modular budget	0.00	\$7,800.00	01-Mar-2011	29-Feb-2012
11	532202	Subawards Direct -- not subject to F&A	Period 3 subawardee direct costs	0.00	\$75,000.00	01-Mar-2011	29-Feb-2012
12	SUBFAGT	Subawards F&A - No F&A	Subawardee F&A costs	0.00	\$48,750.00	01-Mar-2011	29-Feb-2012

Each line item displays the name of the category to which it will print on the budget forms.

Note: You might need to scroll to the right to see all columns.

Returning to the Default View


1. Select the tab for the budget period you want to return to the default view.
2. Select **View > Customize**. The CUSTOMIZE VIEW window opens.




3. Select the **Default** option button (circled above), and click **OK**.

Generating the Remaining Budget Periods

You create the remaining budget periods from the Period 1 budget. This can be done only once, but you can make changes to individual line items and apply those changes to later periods.

1. Check that all budget items that will be needed in future periods are in the Period 1 budget.
2. Click the **Generate All Periods** icon  or select **Budget Periods > Generate All Periods**. A tab is created in the MODIFY BUDGET FOR PROPOSAL screen for each period generated. Each tab displays the same line items as PERIOD 1, but with costs inflated by the rate specified. The TOTAL tab displays totals for the project.



3. Click the **Save** icon  or select **File > Save**. If you have set cost limits and any are exceeded, warnings indicate which periods exceed the limit. Click OK and make any necessary adjustments, as explained in the next section.

Making Adjustments


You can make several adjustments to the budget, as explained in the following sections.

Deleting a Personnel Line Item


Use this procedure to delete a line item that has person details.

1. Open the tab for the budget period from which you want to delete the line item.
2. Select the line item. When selected, it is highlighted in yellow.
3. Click the **Personnel Budget for Line Item** icon  or select **Items > Personnel Budget...** The PERSONNEL BUDGET DETAILS window opens.
4. Click **Delete** to remove the highlighted line. A verification message displays: "Do you want to delete this row?" Click **Yes**. Repeat this step to remove each line in the PERSONNEL BUDGET DETAILS window.
5. When all lines have been deleted, click **OK**. The PERSONNEL BUDGET DETAILS window closes, and focus returns to the period tab.
6. Click the **Delete Line Item** icon  or select **Items > Delete Line Item...**

Note: You cannot use the **Delete** key to delete a line item. You must use the **Delete Line Item** icon or the menu selection.

7. A confirmation message displays. Click **Yes** to delete or **No** to keep the line.
8. Click the **Save** icon  or select **File > Save**.


Deleting a Non-Personnel Line Item

1. Open the tab for the budget period you want to delete the line item from.
2. Select the line item. When selected, it is highlighted in yellow.
3. Click the **Delete Line Item** icon  or select **Items > Delete Line Item...**

Note: You cannot use the **Delete** key to delete a line item. You must use the **Delete Line Item** icon or the menu selection.



4. A confirmation message displays. Click **Yes** to delete or **No** to keep the line.
5. Click the **Save** icon  or select **File > Save**.

Adding a Line Item to One or More Periods

1. Open the tab for the budget period to which you want to add the line item. If you are adding the line item to more than one period, open the tab for the first period to which the line item will be added.
2. Follow the instructions in [Adding Personnel Line Items](#) (page 9), [Adding Non-Personnel Line Items](#) (page 16), or [Adding Subaward Line Items](#) (page 17), depending on the type of line item you are adding.
3. To apply the line item to later periods, click to select it and select **Items > Apply to Later Periods**.
4. Click the **Save** icon  or select **File > Save**.

Changing a Line Item and Applying It to Later Periods

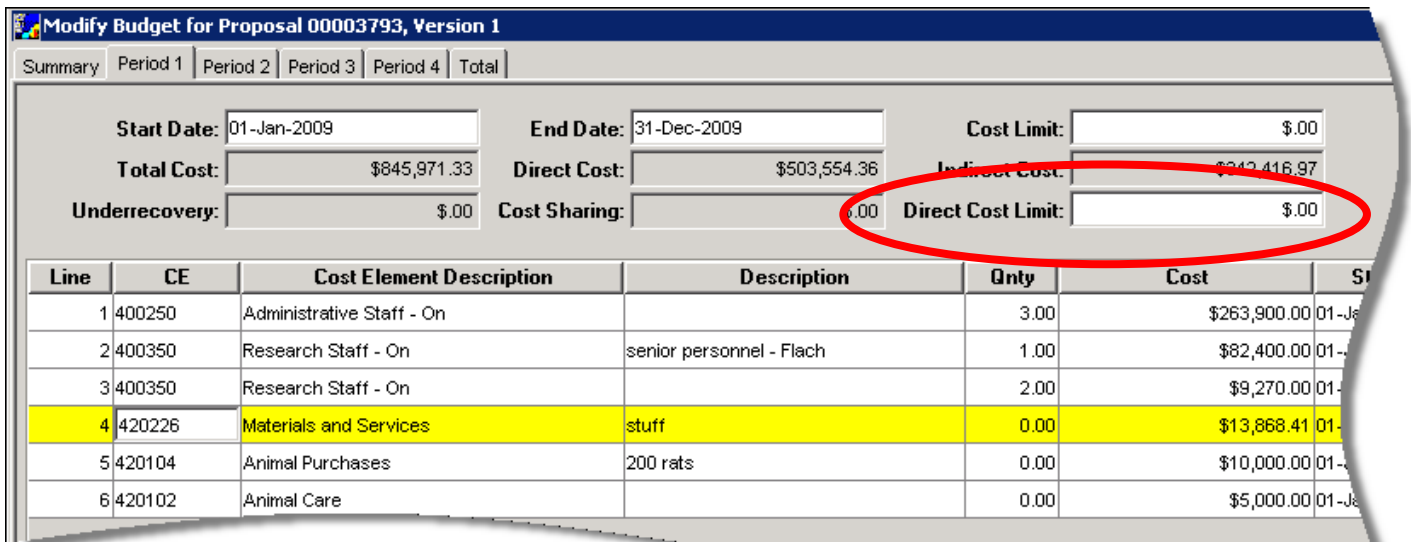
1. Open the tab for the budget period in which you want to change the line. If the line item applies to more than one period, open the tab for the first of those periods.
2. Click to select the line item to change. The line is highlighted in yellow when selected.
3. Do one of the following, depending on the type of line item you are changing:

4. For a personnel line item, click the **Personnel Budget for Line Item** icon  or select **Items > Personnel Budget....** Make the change in the PERSONNEL BUDGET DETAILS window and click **OK**.
5. For a non-personnel line item, double-click the line and make changes in the BUDGET – LINE ITEM DETAIL window. Click **OK**.
6. To add the line item to later periods, click to select it and select **Items > Apply to Later Periods**.
7. Click the **Save** icon  or select **File > Save**.

Syncing Line Items to a Cost Limit

This calculation tool enables the user to adjust a non-personnel line item to meet a total cost limit. Coeus calculates the required overhead, adds (or subtracts) the direct cost to the selected line item, and calculates the indirect cost. If the amount of a line item is reduced, Coeus displays a confirmation message.

1. Open the tab for the period you want to work in.
2. Enter the limit for the period **Direct Cost Limit** (circled below).



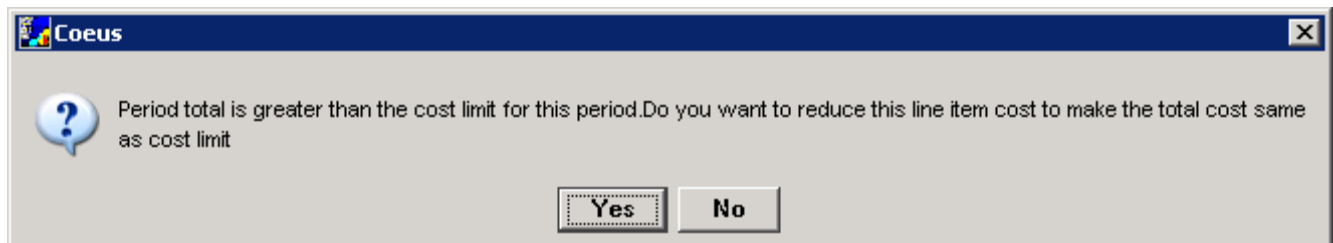
The screenshot shows the 'Modify Budget for Proposal 00003793, Version 1' window. The 'Direct Cost Limit' field is circled in red. The window displays various cost fields and a table of line items.


Line	CE	Cost Element Description	Description	Qty	Cost	SI
1	400250	Administrative Staff - On		3.00	\$263,900.00	01-Jan
2	400350	Research Staff - On	senior personnel - Flach	1.00	\$82,400.00	01-Jan
3	400350	Research Staff - On		2.00	\$9,270.00	01-Jan
4	420226	Materials and Services	stuff	0.00	\$13,868.41	01-Jan
5	420104	Animal Purchases	200 rats	0.00	\$10,000.00	01-Jan
6	420102	Animal Care		0.00	\$5,000.00	01-Jan

3. Click to select a non-personnel line item to adjust.

Note: Consider performing this action incrementally, selecting a different line item for each calculation to distribute the increase or decrease. A personnel line item cannot be synced to the period cost limit.

4. Select **Items > Sync to Direct Cost Limit**
 - o If the budget is being decreased, this message displays.





- o Click **Yes**. The amount in the **Cost** field of the selected line item is decreased.
 - o If the budget is being increased, the amount in the **Cost** field of the selected line item is increased.
5. Repeat steps 1 through 4 for all periods in the budget.
 6. Click the **Save** icon  or select **File > Save**.

Cost Sharing

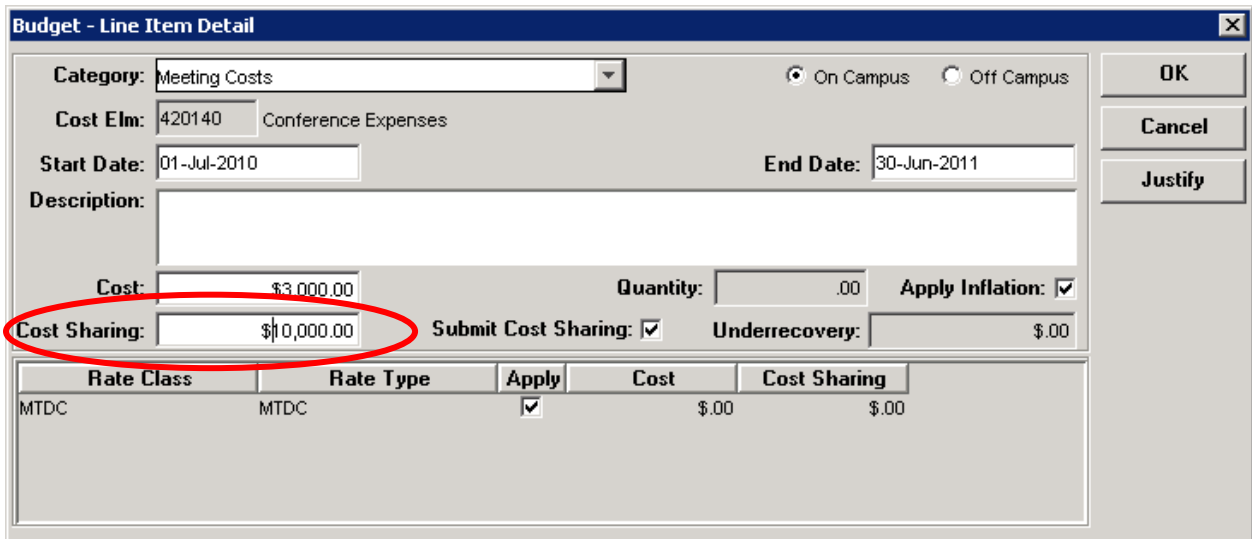
Cost sharing manages the funds in excess of the sponsor's support, to be provided by another source, for the specific proposal.

Entering Cost Sharing by PI or Project Person


1. Click on the personnel line item to cost share.
2. Click the **Personnel Budget for Line Item** icon  or select **Items > Personnel Budget....** The PERSONNEL BUDGET DETAILS window opens.
3. Enter a percentage in the % **Effort** field that is greater than the percentage in the % **Charged** field.
Example: A Professor/PI with a nine-month base salary of \$90,000 (\$10,000 per month) added to the budget for one summer month (7/1 – 7/31) at 100% effort and 50% charge generates \$5,000 + EB + F&A in cost sharing.
4. Click **OK**. The PERSONNEL BUDGET DETAILS window closes.
5. Click the **Save** icon  or select **File > Save**.

Entering Cost Sharing Manually

1. Double-click a non-personnel line item. The BUDGET – LINE ITEM DETAIL window opens.
2. Enter the dollar value in the **Cost Sharing** field. The total cost sharing expense is added to the Period total, including any indirect expenses.



Rate Class	Rate Type	Apply	Cost	Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	\$0.00	\$0.00

3. Click **OK**. The BUDGET – LINE ITEM DETAIL window closes.
4. Click the **Save** icon  or select **File > Save**.

Distributing Cost Sharing Expense

1. Select **Edit > Cost Sharing Distribution....** The MODIFY PROPOSAL COST SHARING window opens.

Modify Proposal Cost Sharing for 00003890, Version 1

Version: Total Cost Sharing:

Period: Total Cost Sharing:


Period: Total Cost Sharing:

Period: Total Cost Sharing:

Period: Total Cost Sharing:

Cost Sharing Distribution List:

Percentage	Fiscal Year	Amount	Source Account
.00	2009	\$2,384.10	
.00	2010	\$2,455.63	
.00	2011	\$2,529.30	
.00	2012	\$2,605.18	
.00	2013	\$2,683.33	

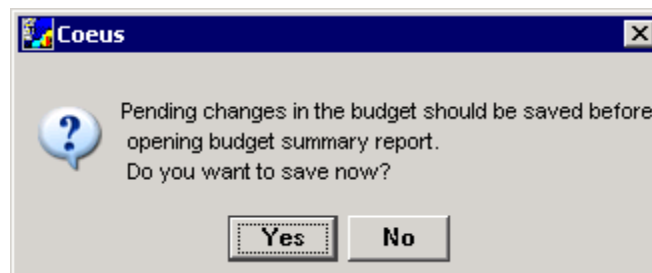
2. Enter a percentage of the cost share expense in the **Percentage** column or the dollar value in the **Amount** column for each fiscal year with a cost sharing expense.
3. Enter an account number or source code in the **Source Account** field for each fiscal year that has a cost sharing expense. For waived F&A use code VP-R.
4. To split an amount among sources, click **Add** to add one or more lines to the **Cost Sharing Distribution List**. Make entries in the added lines as in the steps above.
5. Click **Delete** to remove any lines that do not show distribution.
6. Click **OK**. The MODIFY PROPOSAL COST SHARING window closes.
7. Click the **Save** icon  or select **File > Save**.

Printing a Budget Summary Report

The budget summary reports can be viewed online or printed. They show all budget periods for the proposal.

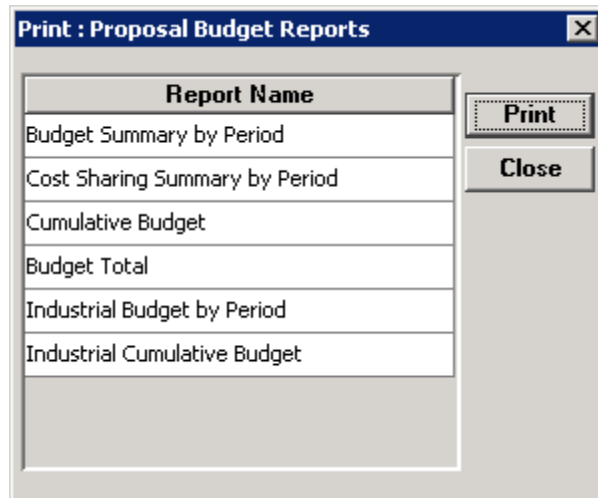
From the MODIFY BUDGET FOR PROPOSAL screen click the **Calculate** icon  or select **Budget Periods > Calculate All Periods**.

1. Select **File > Budget Summary....**
 - a. If you have made changes to the budget but have not saved them, this message displays.



- b. Click **Yes**.

2. The PRINT: PROPOSAL BUDGET REPORTS window opens.



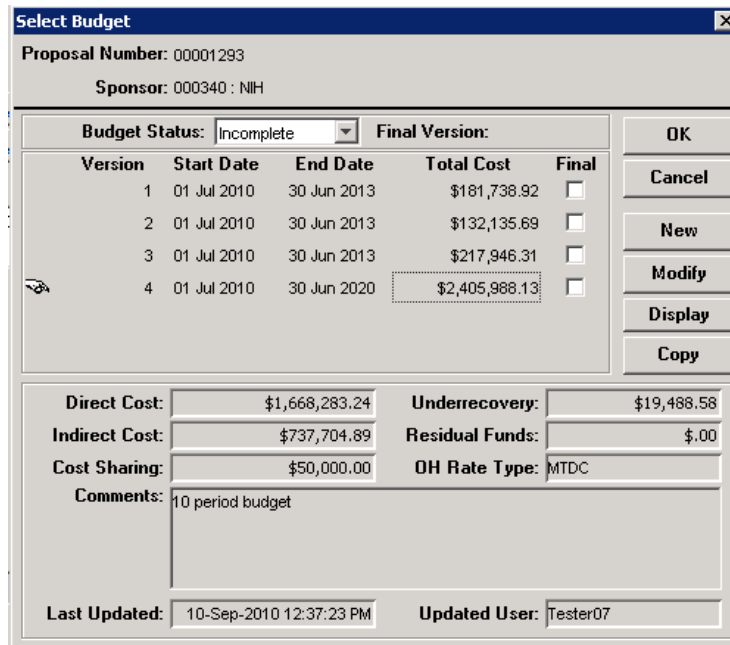
3. Click to select a report and click **Print**. A PDF file of the report opens in a new browser window.
4. Click the PDF **Save** icon in the browser to save a copy of the report.

Modifying an Existing Budget

You can make changes to an existing budget version or create a new version to try different scenarios. You can have any number of versions, but only the one marked **Final** and **Complete** will be included in the final proposal.

Modifying a Budget Version

1. Open the SELECT BUDGET window (see [Opening a Budget](#), page 2).



Version	Start Date	End Date	Total Cost	Final
1	01 Jul 2010	30 Jun 2013	\$181,738.92	<input type="checkbox"/>
2	01 Jul 2010	30 Jun 2013	\$132,135.89	<input type="checkbox"/>
3	01 Jul 2010	30 Jun 2013	\$217,946.31	<input type="checkbox"/>
4	01 Jul 2010	30 Jun 2020	\$2,405,988.13	<input type="checkbox"/>

Direct Cost: \$1,668,283.24 Underrecovery: \$19,488.58
Indirect Cost: \$737,704.89 Residual Funds: \$.00
Cost Sharing: \$50,000.00 OH Rate Type: MTDC
Comments: 10 period budget
Last Updated: 10-Sep-2010 12:37:23 PM Updated User: Tester07

2. Click to select the version to modify. The icon on the left points to the selected version.
3. Click **Modify**. The MODIFY BUDGET FOR PROPOSAL screen for the selected version opens.

Modify Budget for Proposal 00001293, Version 4

Summary | Period 1 | Period 2 | Period 3 | Period 4 | Period 5 | Period 6 | Period 7 | Period 8 | Period 9 | Period 10 | Total

Version: 4 Final Start Date: 01-Jul-2010 End Date: 30-Jun-2020

Residual Funds: \$0.00 Total Cost Limit: \$0.00 OH Rate Type: MTDC

Total Cost: \$2,435,938.13 Total Direct Cost Limit: \$0.00 Direct Cost: \$1,668,293.24

Indirect Cost: \$737,704.89 Underrecovery: \$19,488.58 Cost Sharing: \$50,000.00

Comments: 10 period budget

Budget Status: Incomplete

UR Rate Type: MTDC


On/Off Campus: Default

Modular Budget:

Submit Cost Sharing:

Proposal Hierarchy:

Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Jul-2010	30-Jun-2011	12.0	\$208,294.43	\$144,965.73	\$63,318.70	\$5,000.00	\$1,700.00
2	01-Jul-2011	30-Jun-2012	12.0	\$216,771.33	\$150,556.00	\$66,215.33	\$5,000.00	\$1,751.00
3	01-Jul-2012	30-Jun-2013	12.0	\$223,086.63	\$154,869.79	\$68,216.84	\$5,000.00	\$1,803.53
4	01-Jul-2013	30-Jun-2014	12.0	\$229,962.66	\$159,534.01	\$70,438.65	\$5,000.00	\$1,857.64
5	01-Jul-2014	30-Jun-2015	12.0	\$236,636.55	\$164,095.03	\$72,541.52	\$5,000.00	\$1,913.36
6	01-Jul-2015	30-Jun-2016	12.0	\$243,510.67	\$168,792.89	\$74,717.78	\$5,000.00	\$1,970.76
7	01-Jul-2016	30-Jun-2017	12.0	\$250,590.99	\$173,631.69	\$76,959.31	\$5,000.00	\$2,029.99
8	01-Jul-2017	30-Jun-2018	12.0	\$257,883.70	\$178,615.62	\$79,269.08	\$5,000.00	\$2,090.78
9	01-Jul-2018	30-Jun-2019	12.0	\$265,395.22	\$183,749.09	\$81,646.13	\$5,000.00	\$2,153.91
10	01-Jul-2019	30-Jun-2020	12.0	\$273,865.95	\$189,473.40	\$84,392.55	\$5,000.00	\$2,218.11

4. Make your changes. Refer to preceding sections of this chapter for instructions.
5. Click the **Save** icon  or select **File > Save**.

Creating a New Version

Coeus provides two options for creating a new version of the budget. Instructions for both options are given here.

Copying an Existing Version

Before you copy a budget version, be aware of the changes you want to make. If you will make a minor change that occurs in one or two line items, copy all periods. If you will make extensive changes to staff, effort, and line items, copy only Period 1 and generate the remaining periods.


1. Open the SELECT BUDGET window (see [Opening a Budget](#), page 2).

Select Budget

Proposal Number: 00003890

Sponsor: 000500 : NSF

Budget Status: Incomplete Final Version:

Version	Start Date	End Date	Total Cost	Final
 1	01 Jan 2009	31 Dec 2013	\$751,687.45	<input type="checkbox"/>
2	01 Jan 2009	31 Dec 2013	\$533,876.96	<input type="checkbox"/>

OK

Cancel

New

Modify

Display

Copy

2. Click to select the version to copy. The icon on the left points to the selected version.
3. Click **Copy**. The COPY BUDGET window opens.

Copy Budget

A new Version of the budget will be created based on version 1

Copy period one only

Copy all periods

OK

Cancel

4. Select one of the options buttons, depending on the type of changes you will make. Click **OK**.
5. The MODIFY BUDGET FOR PROPOSAL screen for the new version opens.

6. Create the new budget version. Refer to preceding sections of this chapter for instructions.

Creating a Version Without Copying

1. Open the SELECT BUDGET window (see [Opening a Budget](#), page 2).

2. Click **New**. The CREATE BUDGET FOR PROPOSAL screen opens, displaying the new version number.
3. Create the new budget version. Refer to preceding sections of this chapter for instructions.

Finalizing the Budget

One version of the budget must be marked **Final** and **Complete** before the proposal is submitted for approval. This is the only version that will be submitted to the sponsor. You can finalize the version on the SELECT BUDGET window list or on the version's SUMMARY tab.

Perform Budget Validations:

Business Rule Validations for Proposal Budgets. Coeus provides budget-specific validation rules. Users can manually perform the validations prior to finalizing their budgets but budget validation rules will *automatically* be run when a budget is marked Complete. If the budget fails the validation rule, the budget cannot be marked Complete. The user will be presented with an error notice and be advised to return to the budget and fix the error condition.



The proposal must have a budget, and the budget must be marked **Final** in order to perform the Budget Business Rule Validations!

To perform budget validations prior to marking the budget complete, from the Budget module, use menu path **Action > Budget Validations**

Budget Validation Errors:

- If a proposal budget fails a validation rule, a red error notice is presented to the user.
- The Department (unit) where the rule is applied appears in the alert text, as validation rules can be applied at any level in the hierarchy.
- The text from the validation rule's User Message should be specific as the budget cannot be marked Complete until the budget can pass the validation.

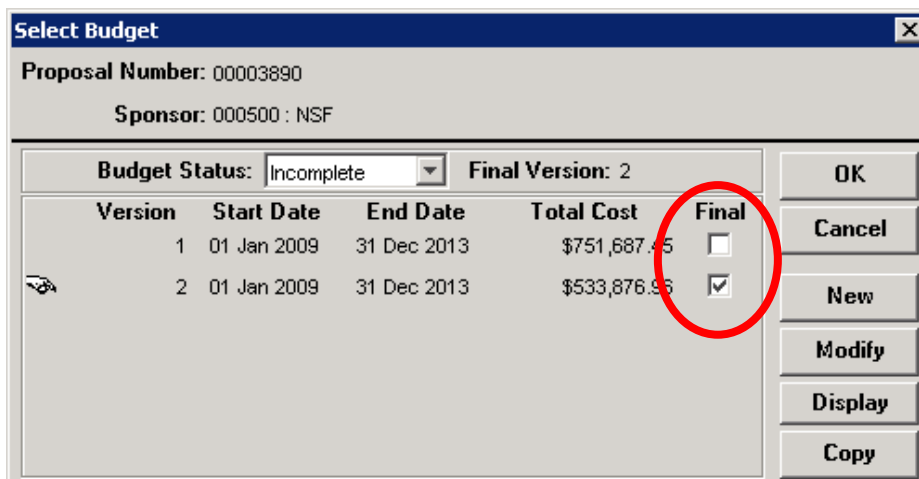
- If more than one budget validation rule failed, all user messages will be presented with a red Error heading.

Budget Validation Warnings:

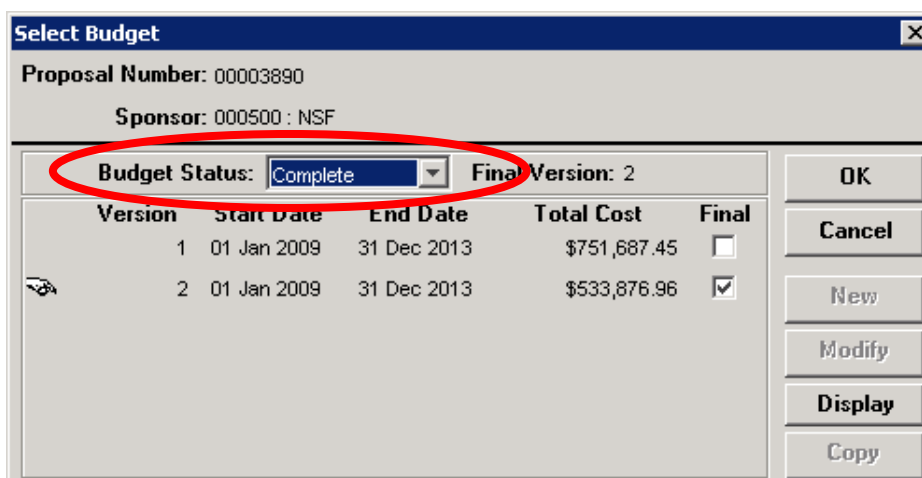
- Validation Warnings are presented under a blue validation notice.
- The Department (unit) where the rule is applied appears, as validation rules can be applied at any level in the hierarchy.
- Warning messages do *not* keep a budget from being marked Complete.
- If more than one budget validation warning was triggered, all user messages will be presented with a blue Warning heading.

On the Select Budget Window

1. Open the SELECT BUDGET window (see [Opening a Budget](#), page 2).



2. Select the **Final** checkbox (circled above) for the version. This message displays: "You are modifying the final version status. Are you sure?"
3. Click **Yes**.
4. In the **Budget Status** field (circled below) select **Complete** from the drop-down list.



5. Click **OK**.
6. Click the **Save** icon  or select **File > Save**.

On the Budget Summary Tab

1. Open the SUMMARY tab of the selected version.

Modify Budget for Proposal 00001293, Version 4

Summary | Period 1 | Period 2 | Period 3 | Period 4 | Period 5 | Period 6 | Period 7 | Period 8 | Period 9 | Period 10 | Total

Version:	4	Final:	<input type="checkbox"/>	Start Date:	01-Jul-2010	End Date:	30-Jun-2020
Residual Funds:	\$0.00	Total Cost Limit:	\$0.00	OH Rate Type:	MTDC	Direct Cost:	\$1,668,283.24
Total Cost:	\$2,405,988.13	Total Direct Cost Limit:	\$0.00	Cost Sharing:	\$50,000.00	Budget Status:	Incomplete
Indirect Cost:	\$737,704.89	Underrecovery:	\$19,488.58	UR Rate Type:	MTDC	On/Off Campus:	Default
Comments:	10 period budget			Modular Budget:	<input checked="" type="checkbox"/>	Submit Cost Sharing:	<input checked="" type="checkbox"/>
				Proposal Hierarchy:	<input checked="" type="checkbox"/>		

2. Select the **Final** checkbox (circled above). This message displays: "You are designating a new final version. Are you sure?"
3. Click **Yes**.
4. In the **Budget Status** field (circled below) select **Complete** from the drop-down list.
5. Confirm if Cost Sharing expense should be transmitted on the Grants.gov forms; if yes, keep the **Submit Cost Sharing** box checked, or uncheck the box to keep this information from appearing on those forms.
6. Check the **Modular Budget** box if the NIH PHS398 Modular Budget form is selected. (See section on creating a modular budget).

Modify Budget for Proposal 00001293, Version 4

Summary | Period 1 | Period 2 | Period 3 | Period 4 | Period 5 | Period 6 | Period 7 | Period 8 | Period 9 | Period 10 | Total

Version:	4	Final:	<input checked="" type="checkbox"/>	Start Date:	01-Jul-2010	End Date:	30-Jun-2020
Residual Funds:	\$0.00	Total Cost Limit:	\$0.00	OH Rate Type:	MTDC	Direct Cost:	\$1,668,283.24
Total Cost:	\$2,405,988.13	Total Direct Cost Limit:	\$0.00	Cost Sharing:	\$50,000.00	Budget Status:	Complete
Indirect Cost:	\$737,704.89	Underrecovery:	\$19,488.58	UR Rate Type:	MTDC	On/Off Campus:	Default
Comments:	10 period budget			Modular Budget:	<input type="checkbox"/>	Submit Cost Sharing:	<input checked="" type="checkbox"/>
				Proposal Hierarchy:	<input checked="" type="checkbox"/>		

7. Click the **Save** icon  or select **File > Save**.

Creating a Modular Budget

NIH is the only sponsor that requires modular budgets. See the sponsor opportunity for specific requirements. If you need to submit a modular NIH budget for your proposal, it is recommended that you follow the preceding instructions for creating a detailed budget so that you accurately calculate indirect expenses.

How to Create a Modular Budget

1. Create the detailed budget as explained in preceding sections of this chapter.
2. On the budget SUMMARY tab select the **Modular Budget** checkbox (circled below).

The screenshot shows the 'Modify Budget for Proposal 00001179, Version 1' window. The 'Summary' tab is selected. The window contains several fields for budget details. The 'Modular Budget' checkbox is circled in red. Other fields include Version (1), Final (checked), Start Date (01-Jan-2012), End Date (31-Dec-2014), Residual Funds (\$0.00), Total Cost Limit (\$0.00), OH Rate Type (MTDC), Direct Cost (\$750,000.00), Total Cost (\$1,259,999.99), Total Direct Cost Limit (\$0.00), Indirect Cost (\$509,999.99), Underrecovery (\$0.00), Cost Sharing (\$0.00), Budget Status (Incomplete), UR Rate Type (MTDC), On/Off Campus (Default), Submit Cost Sharing (checked), and Proposal Hierarchy (unchecked).

3. Select **Edit > Modular Budget**. The MODULAR BUDGET FOR PROPOSAL window opens.

The screenshot shows the 'Modular Budget for Proposal 00001179, Version 1' window. The 'Period 1' tab is selected. The window contains fields for Start Date (01-Jan-2012) and End Date (31-Dec-2012). The 'Direct Costs' section includes Direct Cost less Consortium F&A (\$0.00), Consortium F&A (\$0.00), and Total Direct Costs (\$0.00). The 'Indirect Costs' section includes a table with columns for Rate Number, Indirect Cost Type, IDC Rate (%), IDC Base, and Funds Requested. The 'Total Indirect Costs' is \$0.00. The 'Total Direct and Indirect Costs' section includes Funds Requested (\$0.00). Buttons for OK, Cancel, Sync, Add, and Delete are visible on the right side.

4. **Optional** (Do this if the modular budget is being created from a detailed budget.) Click **Sync**. Coeus synchronizes the modular budget with the budget you created, suggests the number of \$25,000 modules, and uploads the calculated indirect costs and rates for each budget period.
5. If you did not create a detailed budget, enter all required data (see below) for each budget period.
6. Click **OK**. The MODULAR BUDGET FOR PROPOSAL window closes, and the modular budget is saved.

Note: If you make any changes to the detailed budget after creating the modular budget, you must return to the modular budget window and click **Sync** to refresh the window.

You can manually edit all fields in the MODULAR BUDGET FOR PROPOSAL window, but when you click **Sync**, and data you entered is overwritten with data generated by the sync process.

All fields in the MODULAR BUDGET FOR PROPOSAL window are **required**.

- **Direct Cost Less Consortium F&A** — Direct cost for the period, calculated from the detailed budget and rounded up to the nearest \$25,000. This value does not include any F&A generated by consortiums (subawards).
- **Consortium F&A** — The total F&A entered for any consortium or subawards using the GL or cost element for that purpose.
- **Indirect Costs**
 - **Indirect Cost Type** —Type of IDC, such as MTDC or TDC.
 - **IDC Rate (%)** — Rate of indirect cost applied to the period (or part of the period if a prorated base and total).
 - **IDC Base** — Funds in the budget that generate IDC.
 - **Funds Requested** — Indirect costs plus applied F&A.

Modular Budget for Proposal 00001179, Version 1

Period 1 | Period 2 | Period 3 | Cumulative

Start Date: 01-Jan-2012 End Date: 31-Dec-2012

Direct Costs

Direct Cost less Consortium F&A: \$250,000.00

Consortium F&A: \$.00

Total Direct Costs: \$250,000.00

Indirect Costs

Rate Number	Indirect Cost Type	IDC Rate (%)	IDC Base	Funds Requested
1	MTDC	68.0	\$250,000.00	\$170,000.00

Total Indirect Costs: \$170,000.00

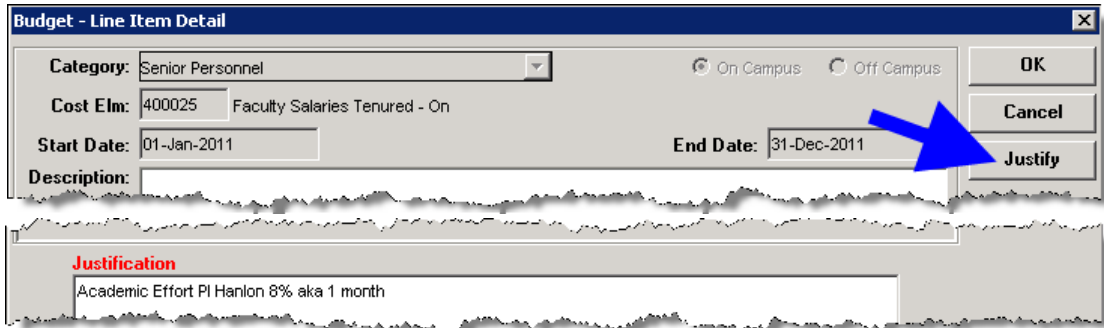
Total Direct and Indirect Costs

Funds Requested: \$420,000.00

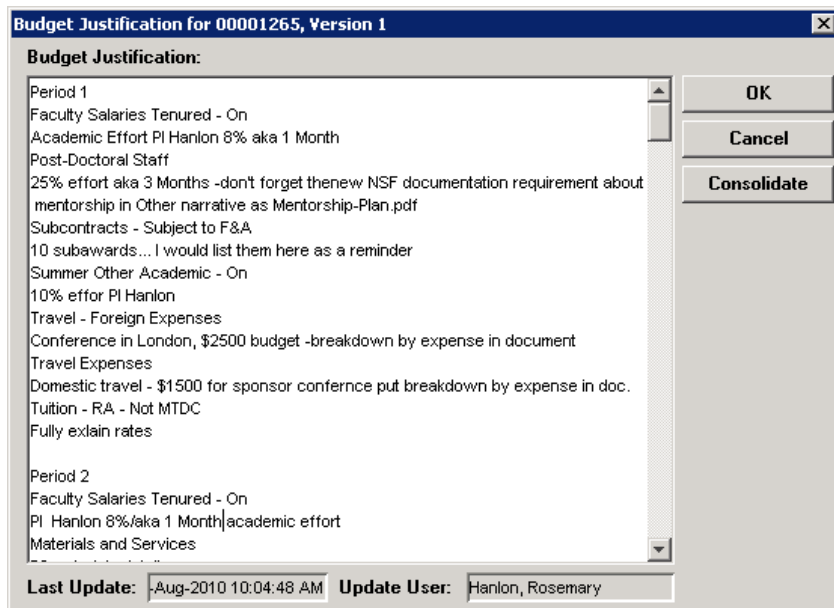
Buttons: OK, Cancel, Sync, Add, Delete

Creating the Budget Justification Document

You can consolidate the notes in the **Justification** field of the BUDGET – LINE ITEM DETAIL window and use them as the basis of the Budget Justification narrative document.



1. Open a blank document outside of Coeus (such as a Word document) to be used as the Budget Justification narrative document.
2. In the MODIFY BUDGET FOR PROPOSAL screen select **Edit > Budget Justification**. A blank BUDGET JUSTIFICATION window opens.
3. Click **Consolidate**. All justification notes are merged in the Budget Justification notepad.



4. Select the text in the window and press **Ctrl+C** (Mac users press **Command+C**) to copy it.
 - The Budget Justification notepad entries can be edited in this window, but changes will not be returned to the line item detail.
 - Changes or additional line item budget justification entries made to the Budget Details will not appear unless the **Consolidate** button is used.
 - Repeated use of "Consolidate" button adds a new, complete justification list to the notepad. The new list will be separated by a row of asterisks (*****). Users may wish to delete the previous consolidated list (or cut and paste to an external document) before repeating the use of the Consolidate button.
5. Paste the text in the budget justification document and use this list as an aide to completing your sponsor's required elements.



TIP: Use this notepad tool to generate a list, and then cut and paste to an external document to format and conform to your sponsor and institutional requirements. This tool will not automatically create or generate a budget justification narrative attachment.