



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 two tabs: "Budgets" and "History". The "History" tab is selected and highlighted in light blue. Below the tabs, the heading "Working Budgets" is displayed. Underneath, there is a section titled "Name" with a horizontal line below it. A single entry is listed: a small blue folder icon followed by the text "Pittsburgh Curling Club".

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

A screenshot of a web interface showing a section titled "Next Steps". Below the title is a large, dark blue rectangular button with the text "Edit Budget" in white, sans-serif font.

3. Complete the General Budget Information SmartForm.
4. Enter a Title (or keep the default title). Select the Principal Investigator. Indicate whether this is a Subaccount budget or not.

If this is a Subaccount budget (not the master budget), indicate so by selecting Yes. See the [Creating and Routing a Subaccount](#) guide for additional information.

Determine the work location. Indicate if the work is being done On or Off Campus.

* Budget title: ?
Pittsburgh Curling Club

* Principal Investigator for this budget:
Eric Larson

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

* Is this work On or Off Campus? ?
☒ On Campus ☐ Off Campus

If you change the rate from On-Campus, it will be necessary to click [SAVE](#) above for the correct rates to appear.

5. 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. See the [Non-System-to-System Proposal Submission](#) or [System-to-System Proposal Submission](#) guide for additional information on the 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

F&A Cost Base	Period	
	1	2
MTDC	Start: 7/1/2023	7/1/2024
	End: 6/30/2024	6/30/2025
	Rate: 59%	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%	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 <input type="text"/>	Rate: <input type="text" value="10%"/>	<input type="text" value="10%"/>	Clear

*** If no, indicate why:** [?](#)
☐ Sponsor Mandated
☐ F&A Waiver

See the [Request IDC Waiver](#) guide for addition information on requesting and processing a ICD Waiver request.

- 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. If yes is selected addition SmartForms will be required to be completed documenting Travel and/or Trainees.

*** 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](#)

7. 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. Selecting No will exclude the budget from total calculations.

Include in proposal budget?

☒ Yes ☐ No [Clear](#)

8. Verify the salary cap.
9. 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.

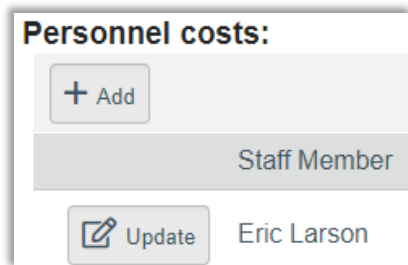
Import Proposal Personnel

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

Personnel Cost Definition

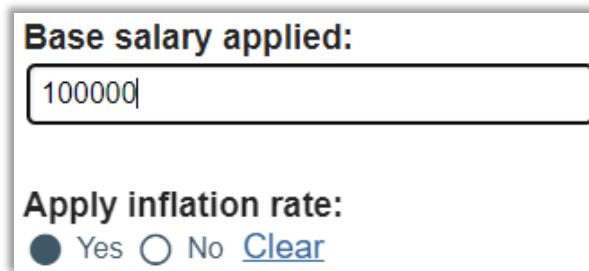
[Go to additional personnel on funding proposal](#)

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.



The image shows a form titled "Personnel costs:". It contains a "+ Add" button. Below this is a row with a grey background and the text "Staff Member". At the bottom, there is an "Update" button with a pencil icon and the name "Eric Larson".

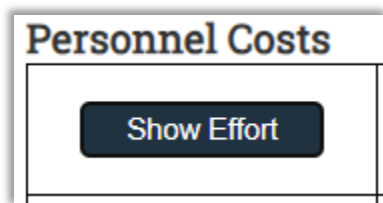
5. To add salary and determine if inflation is allied select Update.



The image shows a form titled "Base salary applied:". It has a text input field containing "100000". Below this is a section titled "Apply inflation rate:" with two radio buttons, "Yes" (selected) and "No", and a "Clear" link.

The Personnel Costs SmartForm

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



The image shows a form titled "Personnel Costs". It contains a "Show Effort" button.

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

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

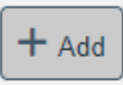
The General Cost Definition SmartForm

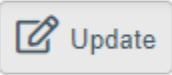
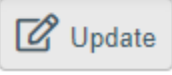
1. For a detailed budget a budget category will be selected. Select the appropriate category, enter an amount, provide a description, and determine if inflation is to be applied. If you decide to not apply inflation the budget table on the General Costs SmartForm will be open for editing.

Add General Cost	
1. * General cost type:	<input type="text" value="Equipment"/> ▼
2. Cost:	<input type="text" value="10000"/>

2. Select OK to add the budget items.

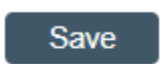


General costs:

 + 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		
	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