

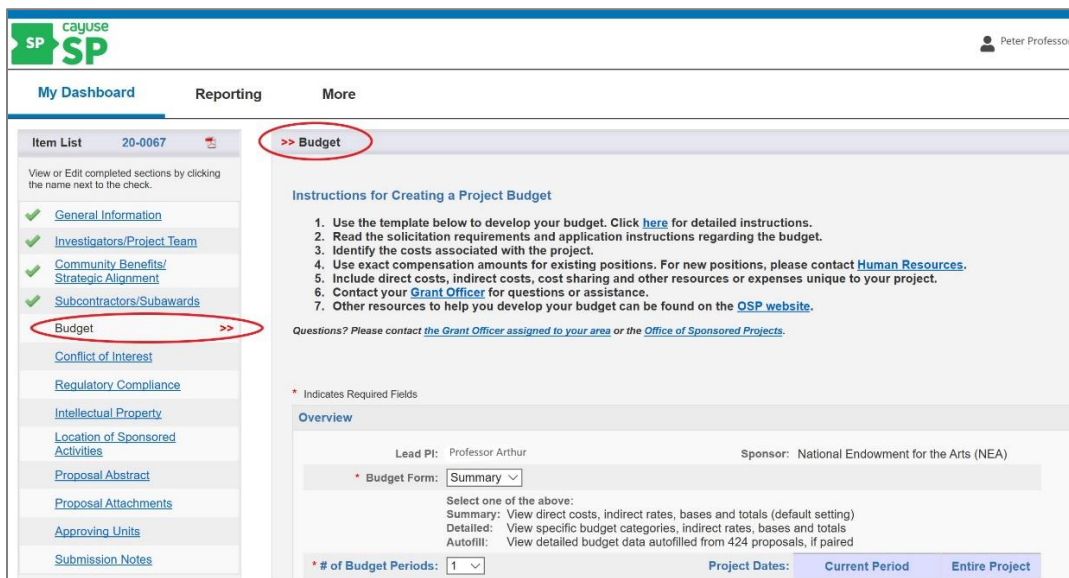
Budget

The **Budget** section is used to develop the sponsored project proposal budget. The Lead-PI, Grant Officer and project team work collaboratively to develop the budget, following the sponsor solicitation budget guidelines and SLCC guidelines to determine detailed information on specific budget categories and estimate all expenditures associated with the project.

Cayuse SP Budget preparation also includes calculating established indirect costs, salary and fringe benefit information, providing information regarding cost share requirements, if applicable, entering detailed budget period information for the first year and totals across all years, and detailing budgetary comments that will be helpful to the reviewers of the project. Detailed budget forms are typically used for all Cayuse SP proposals.

Developing a Budget in Cayuse SP

Begin by reading the instructions at the top of the Budget section. Also, ensure that the project team has read and understands the budget instructions provided by the sponsor in the solicitation.



All fields marked with a red asterisk are required. Data entered in the budget will not be retained until it is saved using the save button at the bottom of the Budget section.

Work closely with your assigned OSP Grant Officer to complete the Budget section and other budget related documents.

The following instructions are intended to supplement the guidance and instructions provided by your OSP Grant Officer. Work closely with your Grant Officer to complete the Budget Section.

Overview

The Overview piece of the budget displays the Lead PI and Sponsor information and collects specific details regarding the type of budget form, budget periods, project dates and budget comments.

The screenshot shows a web form titled "Overview" with a header note: "* Indicates Required Fields". The form contains the following fields and options:

- Lead PI:** Josh Elstein
- Sponsor:** National Endowment for the Arts (NEA)
- * Budget Form:** Summary (dropdown menu)
- Select one of the above:**
 - Summary: View direct costs, indirect rates, bases and totals (default setting)
 - Detailed: View specific budget categories, indirect rates, bases and totals
 - Autofill: View detailed budget data autofilled from 424 proposals, if paired
- * # of Budget Periods:** 1 (dropdown menu)
- Project Dates:** A table with two columns: "Current Period" and "Entire Project".

	Current Period	Entire Project
* Start	<input type="text" value="mm/dd/yyyy"/> Clear	01/01/22
* End	<input type="text" value="mm/dd/yyyy"/> Clear	12/31/23
- Comments:** (512 chars max)

Budget Form

There are three budget forms available for use.

- 1. Summary Budget:** Shows direct and indirect (F&A) Costs, providing a high-level overview of the project's budget for the current period and for the total project period.
- 2. Detailed Budget:** Provides a more fine-grained division of the budget into categories of direct costs, including Personnel, Travel, Equipment, and Materials.
- 3. Autofill Budget:** Using a linked Cayuse 424 proposal, budget data is filled from the 424 system into a detailed budget form. Do not use this option unless guided by your Grant Officer. Appendix A provides additional instruction for transmitting information from Cayuse 424.

All proposal budgets should be prepared using the Detailed budget form.

In some cases, formula funded, lump-sum or operating budget grant proposals only require a summary budget form. When preparing these budgets, consult with your Grant Officer regarding which budget form is appropriate for your proposal.

The budget form can be changed during proposal development. Data entered and saved for one budget form will be retained until a new budget form is selected and saved. Toggling between budget forms and entering data is possible, but once information on one form is saved, any information entered on the other form will be lost.

Click the drop-down arrow in the Budget Form field to select “Detailed” from the drop-down menu.

Overview

Lead PI: Josh Elstein Sponsor: National Endowment for the Arts (NEA)

* Budget Form: Detailed

Summary

Detailed

Detailed: View direct costs, indirect rates, bases and totals (default setting)

Detailed: View specific budget categories, indirect rates, bases and totals

Autofill: View detailed budget data autofilled from 424 proposals, if paired

of Budget Periods

The number of budget periods is typically equal to the number of project years. For example, if a project’s start and end dates are 01/01/2022 through 12/31/2023, there are two project years and therefore two budget periods.

To determine the number of budget periods for proposals with irregular project start and end dates, consult with your Grant Officer.

Click the drop-down arrow in the # of Budget Periods field to select the number of budget periods from the drop-down menu.

* # of Budget Periods: 2

Project Dates: Current Period Entire Project

* Start 01/01/2022 Clear 01/01/22

* End 12/31/2022 Clear 12/31/23

Comments: (512 chars max) Project involves community focused activities and the sponsor requires certain activities related to these activities.

Cost Sharing ⓘ

Please note that changing the number of budget periods will reset all budget numbers for the Entire Project period. Select the correct number of periods before working on other sections of the budget.

Project Dates

The dates for the **Entire Project** carry over from the information entered in the Start New Proposal/General Information section.

The dates for the first project period, or **Current Period**, need to be entered in the corresponding fields. Use the calendar icons to select the start date and end date for the current period.

The current period start date will match the entire project start date. The current period end date will typically be the last day of the end of a 12-month calendar period. If the project is less than 12 months in total, use the end date of the project.

* # of Budget Periods: 2	Project Dates:		Current Period	Entire Project
	* Start	01/01/2022	Clear	01/01/22
	* End	12/31/2022	Clear	12/31/23
Comments: (512 chars max)	This project involves community focused activities and the sponsor requires certain expenditures related to these activities.			

To edit or update the entire project period, return to the General Information section of the proposal.

Comments

Comments related specifically to the project budget should be entered here. Use the Comments box to capture unique information or explain eccentricities in your budget. Comments regarding the budget are useful to both the project team as well as approvers not familiar with the project.

Comments regarding indirect costs or irregular F&A rates should always be included. For example, if indirect costs are not allowed on the project, if there are restriction on the indirect cost rate, or if the indirect cost rate is different from SLCC’s federally accepted rate, then please indicate this information in the Comments box and in the Submission Notes section of the proposal. A statement such as, “*This sponsor only accepts a maximum 10% Indirect (F&A) Costs rate*” is acceptable.

Use the Comment box to explain formula-funding or a lump-sum budgets.

Comments are visible to SLCC users with access to review and approve the project. The information provided is critical for reviewers and approvers. Comments can be edited at any time prior to routing for internal approvals.

Cost Sharing

Cost Sharing refers to the costs of a project not borne by the sponsor. A proposal involves cost sharing if the institution, the Unit/Institute, and/or a subcontractor provides cost sharing in support of the project. All cost sharing must be documented in accordance with established criteria.

The solicitation may refer to cost sharing as matching or leverage. The terms are often used interchangeably. Cost matching is a sub-type of cost sharing.

Begin by reading the instructions at the beginning of this section.

If you answer **No**, you can move on to the F&A Rates section of the budget.

Cost Sharing ⓘ

* **REQUIRED COST SHARING**, also referred to as cost share, match, and leverage, means the costs of a project not borne by the sponsor.

Cost share/match/leverage includes the portion of the total project cost which the applicant or applicant partners are required to spend to meet the terms and conditions of the sponsored project. Cost share may be in the form of new or existing resources, cash matching, and may be internal or external.

To learn more about cost sharing, please refer to the [Sponsored Projects Handbook](#).

Does this proposal include cost share?

Yes No

If you answer **Yes** to the initial question, additional **Internal Cost Sharing** and **Third-Party Cost sharing** fields will appear.

Cost Sharing ⓘ

* **REQUIRED COST SHARING**, also referred to as cost share, match, and leverage, means the costs of a project not borne by the sponsor.

Cost share/match/leverage includes the portion of the total project cost which the applicant or applicant partners are required to spend to meet the terms and conditions of the sponsored project. Cost share may be in the form of new or existing resources, cash matching, and may be internal or external.

To learn more about cost sharing, please refer to the [Sponsored Projects Handbook](#).

Does this proposal include cost share?

Yes No

If yes, please fill in below:

Internal Cost Sharing
[Add Unit](#)

Unit	Account	Commitment	Match Type	Current Period	Entire Project	Comment
No records found.						

Third-Party Cost Sharing
[Add Organization](#)

Organization	Account	Commitment	Match Type	Current Period	Entire Project	Comment
No records found.						

Internal Cost Sharing

If there is any internal cost sharing associated with the project, then select **Add Unit** under Internal Cost Sharing:

The following pop-up window will appear:

Add Internal Cost Sharing

* Unit:

Period Total: \$

* Commitment Type:

* Match Type:

* Account: TBD if not known

Comment:

Click into the **Unit** field.

The screenshot shows the 'Add Internal Cost Sharing' form. The 'Unit' field is highlighted with a red oval. Below it are fields for 'Period Total' and 'Project Total', both showing '\$ 0'. There are dropdown menus for 'Commitment Type' and 'Match Type'. An 'Account' field is present with the text 'TBD if not known'. A 'Comment' text area is at the bottom, and 'Add Unit' and 'Cancel' buttons are at the very bottom.

Use the pop-up window list to search for the lead department/division from the list of units. Click on the department/division that will be providing the cost sharing item.

The screenshot shows a 'Select Unit' pop-up window. It has a search bar with 'he' entered and highlighted by a red oval. Below the search bar is a table of available units:

Unit Code	Unit Name
AHEC	AHEC
AH	Allied Health
CHC	Center for Health - Counseling
CSSS	Curric Sched and Site Support
EHS	Environ Health and Safety
GT	Grand Theatre
HP	Health Professions
SHSC	Health Sciences
HLA	Health and Lifetime Activities

The 'Health Sciences' row is highlighted with a red oval.

This will populate the **Admin Unit** information field.

The screenshot shows the 'Add Internal Cost Sharing' form again. The 'Unit' field is now populated with 'Health Sciences' and is highlighted with a red oval. The rest of the form, including the totals, dropdowns, and buttons, remains the same as in the previous screenshot.

Enter the **Period Total** amount. The Project Total amount will auto-populate.

The screenshot shows a form titled "Add Internal Cost Sharing". The "Unit" field is set to "Health Sciences". The "Period Total" field is highlighted with a red circle and contains the value "85,000". Below it, the "Commitment Type" field is a dropdown menu with "..." selected. The "Match Type" field is also a dropdown menu with "..." selected. The "Account" field is a text input with "TBD if not known" as a placeholder. There is a "Comment" text area and "Add Unit" and "Cancel" buttons at the bottom.

Enter the **Commitment Type** from the drop-down menu. Cost sharing may be mandated by law or sponsor policy (**Mandatory**) or offered when not required to demonstrate your institution's commitment to the project (**Voluntary**).

This screenshot is similar to the previous one, but the "Commitment Type" dropdown menu is highlighted with a red circle and shows "Mandatory" selected. The "Match Type" dropdown menu still shows "...".

Click on the drop-down menu to select from the **Match Type**. Click on the **Match Type** to populate the field.

The Match Types to select from are:

- **F&A:** When Indirect (F&A) Costs are not allowed by the Sponsor (some non-federal grants), and cost matching is allowed, the Indirect (F&A) Cost amount applicable to the project budget can be included as cost share.
- **In-Kind:** The value of goods and services (other than cash) contributed to the project. The method of valuing in-kind services and the eligibility of specific in-kind services varies by funding agency.

- **Cash Matching:** The dollar amount contributed to the College or other sources, toward the project. This can include salary, fringe benefits, supplies, and equipment expenses incurred during the project period that relate directly to the project.

Salary Cap: A mandatory form of cost sharing whereby a sponsor limits the salary payable to a PI.

The screenshot shows the 'Add Internal Cost Sharing' form. The 'Unit' field is 'Health Sciences'. The 'Period Total' is '\$ 85,000'. The 'Commitment Type' is 'Mandatory'. The 'Match Type' is 'Cash Matching', which is circled in red. The 'Account' field is empty, with the text 'TBD if not known' to its right. There is a 'Comment' text area and 'Add Unit' and 'Cancel' buttons at the bottom.

Enter the Account Number associated with the cost sharing. Enter TBD if you don't know this number, or None for In-Kind cost sharing.

This screenshot is identical to the previous one, but the 'Account' field now contains the number '10000', which is circled in red. The 'Match Type' is still 'Cash Matching'.

If there are any comments on the internal cost sharing, then include those in the Comment box.

Add Internal Cost Sharing

* Unit: Health Sciences

Period Total: \$ 85,000

* Commitment Type: Mandatory

* Match Type: Cash Matching

* Account: 10000 TBD if not known

Comment:

Add Unit Cancel

Click **Add Unit**.

You can repeat this process for as many units as are involved in cost sharing.

Add Internal Cost Sharing

* Unit: Health Sciences

Period Total: \$ 85,000

Project Total: \$ 85,000

* Commitment Type: Mandatory

* Match Type: Cash Matching

* Account: 10000 TBD if not known

Comment:

Add Unit Cancel

To remove a cost sharing unit, click **Remove** on the far right of the Cost Sharing Unit. Click **Edit** to edit the unit's details.

Internal Cost Sharing

[Add Unit](#)

Unit	Account	Commitment	Match Type	Current Period	Comment	
Health Sciences (SHSC)	10000	Mandatory	Cash Matching	\$85,000	None	Remove Edit

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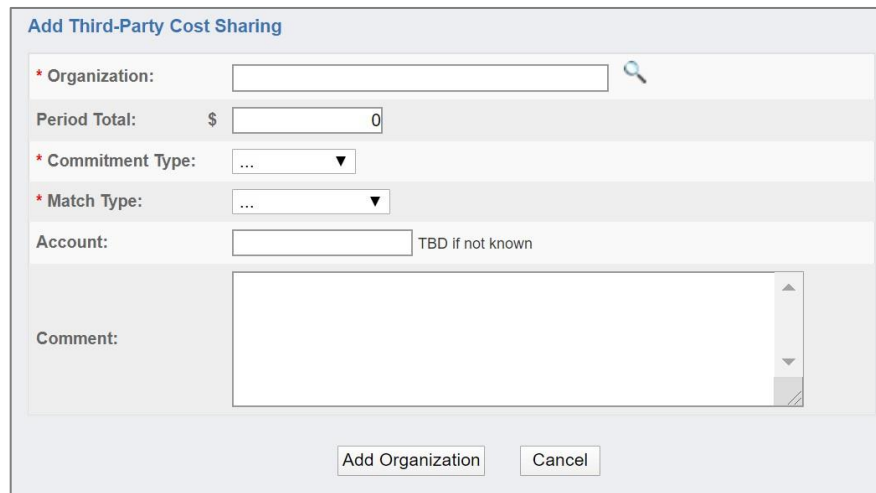
You can repeat this process for as many units as are involved in cost sharing. Units entered as Cost Sharing Units will appear on the Approving Units screen as units that must approve the

proposal. The Approver(s) for this unit, as well as the proposal's Lead Principal Investigator, must certify and approve the cost sharing as part of proposal approval.

Please note: If the total of internal cost sharing, as allocated to the internal cost sharing units, is not the same as the total internal cost sharing indicated, you will receive an error message when attempting to save the budget. **Be sure that you have accounted for all of the cost sharing under the Cost Sharing Units before saving. If you have any questions on this section, please contact your Grant Officer.**

Third-Party Cost Sharing

If there is any third-party cost sharing associated with the project, then select **Add Organization** under Third-Party Cost Sharing:



The screenshot shows a form titled "Add Third-Party Cost Sharing". It contains the following fields and controls:

- * Organization: A text input field with a search icon.
- Period Total: \$ [0]
- * Commitment Type: A dropdown menu.
- * Match Type: A dropdown menu.
- Account: A text input field with the text "TBD if not known" to its right.
- Comment: A large text area.
- Buttons: "Add Organization" and "Cancel" at the bottom.

The following pop-up window will appear:



The screenshot shows two stacked pop-up windows. The top window is titled "Internal Cost Sharing" and has a sub-header "Add Unit". It contains a table with the following columns: Unit, Account, Commitment, Match Type, Current Period, and Comment. Below the table, it says "No records found." The bottom window is titled "Third-Party Cost Sharing" and has a sub-header "Add Organization" which is circled in red. It contains a table with the following columns: Organization, Account, Commitment, Match Type, Current Period, and Comment. Below the table, it says "No records found."

Click into the **Organization** field.

The screenshot shows a form titled "Add Third-Party Cost Sharing". The "Organization" field is highlighted with a red oval. Below it are fields for "Period Total" and "Project Total", both showing "\$ 0". There are dropdown menus for "Commitment Type" and "Match Type". An "Account" field is followed by the text "TBD if not known". A large text area for "Comment" is at the bottom. At the very bottom are "Add Organization" and "Cancel" buttons.

Use the pop-up window list to search for the organization from the list of units. Click Search.

The screenshot shows a search pop-up window with the text "Enter a keyword to locate the organization you are looking for:". Below this is a text input field containing the word "Health". To the right of the input field are "Search" and "Cancel" buttons. The "Search" button is highlighted with a red oval.

Click on the department/division that will be providing the third-party cost sharing item.

The screenshot shows an "Organization Search" pop-up window. It lists several organizations: Agency for Healthcare Research and Quality (AHRQ), Health Resources and Services Administration (HRSA), National Institutes of Health (NIH), Substance Abuse and Mental Health Services Administration (SAMHSA), U.S. Department of Health and Human Services (HHS), and Utah Division of Substance Abuse & Mental Health (USDAMH). The "U.S. Department of Health and Human Services (HHS)" is highlighted with a red oval. At the bottom are buttons for "Search Again", "Organization Not Listed", and "Close Window".

This will populate the **Organization** information field.

The screenshot shows a web form titled "Add Third-Party Cost Sharing". The "Organization" field is highlighted with a red oval and contains the text "U.S. Department of Health and Human Service". Other fields include "Period Total" with a value of "0", "Commitment Type", "Match Type", and "Account" (with a note "TBD if not known"). A "Comment" text area is at the bottom, and there are "Add Organization" and "Cancel" buttons.

Enter the **Period Total** amount.

The screenshot shows the same "Add Third-Party Cost Sharing" form. The "Period Total" field is now highlighted with a red oval and contains the value "10,000". The "Organization" field still contains "U.S. Department of Health and Human Service". All other fields and buttons remain the same as in the previous screenshot.

Enter the **Commitment Type** from the drop-down menu. Cost sharing may be mandated by law or sponsor policy (**Mandatory**) or offered when not required to demonstrate your institution's commitment to the project (**Voluntary**).

The screenshot shows a web form titled "Add Third-Party Cost Sharing". It contains several fields: "Organization" (U.S. Department of Health and Human Service), "Period Total" (\$ 10,000), "Commitment Type" (Voluntary), "Match Type" (...), "Account" (TBD if not known), and a "Comment" text area. At the bottom are "Add Organization" and "Cancel" buttons. The "Commitment Type" dropdown is circled in red.

Click on the drop-down menu to select from the **Match Type**. Click on the **Match Type** to populate the field.

The Match Types to select from are:

- **F&A:** When Indirect (F&A) Costs are not allowed by the Sponsor (some non-federal grants), and cost matching is allowed, the Indirect (F&A) Cost amount applicable to the project budget can be included as cost share.
- **In-Kind:** The value of goods and services (other than cash) contributed to the project. The method of valuing in-kind services and the eligibility of specific in-kind services varies by funding agency.
- **Cash Matching:** The dollar amount contributed to the College or other sources, toward the project. This can include salary, fringe benefits, supplies, and equipment expenses incurred during the project period that relate directly to the project.
- **Salary Cap:** A mandatory form of cost sharing whereby a sponsor limits the salary payable to a PI.

This screenshot is identical to the one above, but the "Match Type" dropdown menu is now highlighted with a red circle and set to "Cash Matching".

Enter the Account Number associated with the cost sharing. Enter TBD if you don't know this number, or None for In-Kind cost sharing.

The screenshot shows a web form titled "Add Third-Party Cost Sharing". The form contains several fields: "Organization" with the value "U.S. Department of Health and Human Service", "Period Total" with a dollar sign and the value "10,000", "Commitment Type" set to "Voluntary", and "Match Type" set to "Cash Matching". The "Account" field contains the value "10000" and is circled in red. To the right of the "Account" field is the text "TBD if not known". Below these fields is a large "Comment" text area. At the bottom of the form are two buttons: "Add Organization" and "Cancel".

If there are any comments on the internal cost sharing, then include those in the Comment box.

This screenshot is identical to the one above, showing the "Add Third-Party Cost Sharing" form. In this version, the "Account" field contains "10000" and the "Comment" text area is circled in red. The "Add Organization" and "Cancel" buttons are visible at the bottom.

Click **Add Organization**.

Add Third-Party Cost Sharing

* Organization: U.S. Department of Health and Human Service

Period Total: \$ 10,000

Project Total: \$ 10,000

* Commitment Type: Voluntary

* Match Type: Cash Matching

Account: 10000 TBD if not known

Comment:

Add Organization Cancel

You can repeat this process for as many units as are involved in the third-party cost sharing.

To remove a third-party cost sharing unit, click **Remove** on the far right of the Cost Sharing Unit. Click **Edit** to edit the unit's details.

Third-Party Cost Sharing
[Add Organization](#)

Organization	Account	Commitment	Match Type	Current Period	Comment	
U.S. Department of Health and Human Services (HHS) (89)	10000	Voluntary	Cash Matching	\$10,000	None	Remove Edit

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The amount entered for third-party cost sharing will appear in the Current Period column on the budget form under Budget Categories. If there is more than one budget period, you will need to enter the third-party cost sharing amount for the entire project. This amount must be greater than or equal to the amount entered for Third-Party Cost Sharing above.

Please note: If the total of third-party cost sharing as allocated to the third-party cost sharing units is not the same as the total third-party cost sharing indicated, you will receive an error message when attempting to save the budget. **Be sure that you have accounted for all third-party cost sharing before saving.**

Contact your Grant Officer or OSP personnel for additional guidance on determining cost share.

Please note: You must have proposal edit access to add or remove a cost share unit. In this portion, you will indicate whether the budget includes cost sharing in the current budget period. Keep in mind that the information on cost sharing for the entire project period is entered in the Budget Categories section.

Next, you will fill out the Indirect (F&A) Cost rate portion of the Budget section.

Completing Your Budget: F&A Rates

After filling out the Cost Sharing portion of the Budget section within your proposal, you will complete the Indirect (F&A) Cost rate portion of the Budget section.

Please Note: F&A Rate is also referred to in Cayuse SP and in these instructions as Indirect Cost Rate, Indirect (F&A) Cost rate, and IDC.

Definition for Indirect Costs and F&A Rate

The Budget section of Cayuse SP and user guide instructions reference “Indirect (F&A) Cost Rate” and “Indirect (F&A) Costs.” Below are definitions to clarify these phrases.

- **F&A Rate:** the rate for calculating the facilities and administrative costs of doing business at the college, sometimes referred to in Cayuse SP and these instructions as Indirect Cost Rate, Indirect (F&A) Cost Rate, and IDC Rate (Indirect Costs Rate).
- **Indirect (F&A) Cost Rate:** is the percentage amount (i.e. 27.5%) that indirect costs (F&A-facilities and administrative) costs are calculated by.
- **Indirect (F&A) Costs:** are the dollar value of costs calculated by multiplying the Indirect (F&A) Cost Rate percent value by the modified total direct costs (MTDC base dollar value).

Summary and Detailed Budgets

Please Note: In this section you will find references to both an Indirect (F&A) Cost rate and to Indirect (F&A) costs. The Indirect (F&A) Cost rate is the percentage amount (i.e. 27.5%) that the Indirect (F&A) costs are calculated by. Indirect (F&A) costs (\$ value) are calculated by multiplying the Indirect (F&A) Cost rate (% value) by the MTDC base (\$ value). See Detailed Budget section of this guide for an example.

You can enter up to three Indirect (F&A) Cost rates (referred to in Cayuse SP as F&A Rate) for the current period and for the entire project. You only need to enter multiple rates if you have proposed dollar amounts that use different F&A rates.

Click inside the F&A rate field to display a table for selecting F&A rates.

F&A Rates		Current Period	Entire Project
F&A Rate (1):	<input type="text" value="0.000"/>	0.000 %	<input type="text" value="0.000"/>
F&A Rate (2):	<input type="text" value="0.000"/>	0.000 %	<input type="text" value="0.000"/>
F&A Rate (3):	<input type="text" value="0.000"/>	0.000 %	<input type="text" value="0.000"/>
Use calculated values: <input checked="" type="checkbox"/>	* Effective Rate:	0.000 %	0.000 %

* The Effective Rate is for reporting purposes. To report different rates than those calculated, uncheck the box and enter the percentage values.

The pop-up window below will be displayed. Salt Lake Community College’s Indirect (F&A) Cost rate is 27.5%. Select 27.5% and the F&A Rate (1) box in the F&A Rates Table will populate. SLCC only has one rate (27.5%) and it does not need to be entered multiple times.

Budget F&A Rate Chart for Salt Lake Community College

Please click on the Indirect Cost Rate number 27.5% below to insert the rate into your budget or change the rate by typing into the F&A Rate box and clicking Change Rate.

If you need assistance, please contact [your Grant Officer assigned to your area](#)

Indirect Cost Rate: 27.5%

F&A Rate: %

If you are using a rate that is not shown in the above table, you can enter it yourself using the **F&A Rate** field at the bottom of the Budget F&A Rate Chart pop-up. Click **Change Rate** after entering the correct rate. If you use a rate other than SLCC’s approved Indirect (F&A) Cost rate, make a note justifying the changed rate under Submission Notes (*See Cayuse SP User Guide – Submission Notes*).

F&A Rate: % Change Rate

By default, the effective rate will be calculated and displayed in reporting. To use a different Effective Rate, uncheck the **Use calculated values** checkbox and enter the desired Effective Rate.

F&A Rates

	Current Period	Entire Project
F&A Rate (1):	<input type="text" value="0.000"/> %	<input type="text" value="0.000"/> %
F&A Rate (2):	<input type="text" value="0.000"/> %	<input type="text" value="0.000"/> %
F&A Rate (3):	<input type="text" value="0.000"/> %	<input type="text" value="0.000"/> %
* Effective Rate:	<input type="text" value="0.000"/> %	<input type="text" value="0.000"/> %

Use calculated values:

* The Effective Rate is for reporting purposes. To report different rates than those calculated, uncheck the box and enter the percentage values.

Be sure that if you have unchecked **Use calculated values**, you have entered the desired Effective Rate, because otherwise you may see calculations that do not match. Contact OSP for additional guidance.

The next step is to fill out the Budget Categories and Additional Resources portions of the Budget section.

Completing Your Budget: Categories and Additional Resources

After filling out the Indirect (F&A) Cost rate portion of the Budget section within your proposal, you will complete the Budget Categories and Additional Resources portions of the Budget section.

Summary Budget

The summary budget provides columns for entering Current Period and Entire Project budget numbers and separates budget categories for Direct and Indirect (F&A) Costs. Sponsor Direct Costs are manually entered and can be broken down into base allocations for the Indirect (F&A) Cost rates. **Use the Summary Budget if your budget is a lump-sum or operational budget.** Formula-funded grants are an example of a proposal that should use a Summary budget. If you use a Summary Budget, add a note in the Comments Box on this page, as well as in the Submission Notes section of the proposal.

Budget Categories		Current Period	Entire Project
	SPONSOR DIRECT COSTS:	\$ 100,000	\$ 100,000
	BASE for F&A Rate (1):	\$ 30,000	\$ 30,000
	BASE for F&A Rate (2):	\$ 0	\$ 0
	BASE for F&A Rate (3):	\$ 0	\$ 0
<input checked="" type="checkbox"/> Use calculated values:	INDIRECT COSTS (F&A):	\$8,250	\$8,250
	FEE:	\$ 0	\$ 0
<input checked="" type="checkbox"/> Use calculated values:	TOTAL SPONSOR PROPOSED COSTS:	\$108,250	\$108,250
	Internal Cost Sharing:	\$0	\$0
	Third-Party Cost Sharing:	\$0	\$0
	TOTAL PROJECT COSTS:	\$108,250	\$108,250

If the Use calculated values checkbox to the left of the line item is checked, the Indirect (F&A) Costs can be calculated. If the Use calculated values box is not checked, these can be entered manually.

Detailed Budget

The detailed budget provides a much more extensive category breakdown, including Senior/Key Person Salary and Fringe, Other Personnel compensation, Equipment, Travel, Participant Costs, and Other Direct Costs. To input the information, select the corresponding field and type in the dollar amount being requested for each category. **All PI's are advised to use the Detailed budget form if your budget is not a lump-sum or operational budget.**

F&A Rates

	Current Period	Entire Project
F&A Rate (1):	27.500 %	27.500 %
F&A Rate (2):	0.000 %	0.000 %
F&A Rate (3):	0.000 %	0.000 %
Use calculated values: <input checked="" type="checkbox"/>	* Effective Rate: 27.501 %	27.501 %

* The Effective Rate is for reporting purposes. To report different rates than those calculated, uncheck the box and enter the percentage values.

Budget Categories

	Current Period	Entire Project
Senior Key Persons:		
Senior/Key Salary	\$ 40,000	\$ 40,000
Fringe Benefits	\$ 3,500	\$ 3,500
Senior Key Persons Subtotal	\$43,500	\$43,500
Other Personnel:		
Project Manager/Coordinator	\$ 0	\$ 0
Faculty	\$ 0	\$ 0
Undergraduate Students	\$ 0	\$ 0
Secretarial/Clerical	\$ 0	\$ 0
Other	\$ 0	\$ 0
Fringe Benefits	\$ 0	\$ 0
Other Personnel Subtotal	\$0	\$0
All Personnel Subtotal	\$43,500	\$43,500
Equipment:	\$ 0	\$ 0
Travel:		
Domestic	\$ 4,000	\$ 4,000
Foreign	\$ 0	\$ 0
Travel Subtotal	\$4,000	\$4,000
Participant Costs:		
Tuition/Fees/Health Insurance	\$ 1,000	\$ 1,000
Stipends	\$ 0	\$ 0
Travel	\$ 500	\$ 500
Subsistence	\$ 0	\$ 0
Other	\$ 0	\$ 0
Participant Costs Subtotal	\$1,500	\$1,500
Other Direct Costs:		
Materials and Supplies	\$ 3,000	\$ 3,000
Publication costs	\$ 0	\$ 0
Consultant Services	\$ 5,000	\$ 5,000
ADP/Computer Services	\$ 0	\$ 0
Subawards/Consortium/Contractual Costs	\$ 0	\$ 0
Equipment or Facility Rental/User Fees	\$ 0	\$ 0
Marketing Costs	\$ 0	\$ 0
Other 1	\$ 0	\$ 0
Other 2	\$ 0	\$ 0
Other 3	\$ 0	\$ 0
Other Direct Costs Subtotal	\$8,000	\$8,000
SPONSOR DIRECT COSTS:	\$57,000	\$57,000
BASE for F&A Rate (1):	\$ 55,500	\$ 55,500
BASE for F&A Rate (2):	\$ 0	\$ 0
BASE for F&A Rate (3):	\$ 0	\$ 0
Use calculated values: <input checked="" type="checkbox"/>	INDIRECT COSTS (F&A):	\$15,263
	FEE:	\$ 0
Use calculated values: <input checked="" type="checkbox"/>	TOTAL SPONSOR PROPOSED COSTS:	\$72,263
	Internal Cost Sharing:	\$0
	Third-Party Cost Sharing:	\$0
	TOTAL PROJECT COSTS:	\$72,263

The F&A Bases must be entered separately, but the Sponsor Direct Costs are automatically calculated from the numbers entered in the detailed budget fields. The F&A Base is the Modified Total Direct Costs (MTDC) for the budget. For example, in the budget above there are \$1500 in Participant Support Costs. Participant Support Costs are not included in the F&A Base rate. To calculate the MTDC, subtract the participant support costs from the Total Direct costs. Enter the resulting number in the Base for F&A Rate 1 Field.

EX:	Total Direct Costs	\$57,000
	Participant Support costs	\$1,500
	MTDC	\$55,500
	Base F&A Rate	27.5%
	Indirect Costs (F&A)	\$15,263

MTDC consists of all salaries and wages, fringe benefits, materials, supplies, services, travel and subcontracts up to the first \$25,000 of each subcontract. MTDC exclude equipment, capital expenditures, patient care charges, student tuition remission, rental costs of off-site facilities, scholarships and fellowships as well as the portion of each subcontract in excess of \$25,000. For assistance, contact your Grant Officer or OSP personnel.

Other Resources

If there are no additional resources, click the No radio button. Then select Save at the bottom of the page.

Other Resources

* Are there other resources (excluding cost share mentioned above) that will be needed to conduct this project including facilities or information technology?

- These other resources may be provided by the college, external partners or third-parties.
- Facilities includes any remodeling and new or unique space needs and vehicle purchases.
- Information technology includes software, significant hardware, and transmission of sensitive data.

Yes No

If there are additional resources needed, then click the Yes radio button. Clicking Yes will expand a field where you can input an explanation.

Other Resources

* Are there other resources (excluding cost share mentioned above) that will be needed to conduct this project including facilities or information technology?

- These other resources may be provided by the college, external partners or third-parties.
- Facilities includes any remodeling and new or unique space needs and vehicle purchases.
- Information technology includes software, significant hardware, and transmission of sensitive data.

Yes No

If yes, please specify the type of needed resources below:

* If yes, please specify the type of needed resources below:

Facilities

Information Technology

Other

* Please provide a brief explanation for the additional resources.

- If the project requires Information Technology, please also contact [IT](#) for evaluation.
- If the project requires Facilities, please also fill out the [space needs request form](#).

Save Reset

Fields with a red asterisk * are required and must be completed before you will be allowed to save your work and move to the next page. Select the applicable needed resources provided from the list: Facilities, Information Technology, and Other. Provide a brief explanation for the additional resources in the field box below. When you have completed your budget, click Save.

If yes, please specify the type of needed resources below:

* If yes, please specify the type of needed resources below:

Facilities

Information Technology

Other

* Please provide a brief explanation for the additional resources.

- If the project requires Information Technology, please also contact [IT](#) for evaluation.
- If the project requires Facilities, please also fill out the [space needs request form](#).

For this project, the Health Sciences Center auditorium will be used|

Save Reset

Next Step

Completing the **Conflict of Interests** section.

For more information, see [Cayuse SP User Guide: Conflict of Interest](#)

Appendix A

Autofill Budget

If transmitting information from Cayuse 424, a third budget form type “**Autofill**” will become available.

- **Autofill Budget:** Similar to the Detailed Budget, all data is filled in using budget data from a linked Cayuse 424 proposal.
- **Please note:** Not all budget forms in Cayuse 424 can transmit information to Cayuse SP. The R&R Budget and the Fed/Non-Fed Budget can be used, but non-standard budgets and most modular budgets cannot. The PHS 398 Modular Budget allows only some fields to autofill.
- Selecting the Autofill budget will immediately fill the budget from Cayuse 424, and other data will be lost.

If you have selected Autofill, and the Last Autofilled from 424 date is before the most recent changes were made to the budget in Cayuse 424, click Re-Autofill to refresh the data.

- The Autofill budget data comes from Cayuse 424 using Autofill, and all total fields are calculated. The calculations cannot be overwritten.
- The Composite BASE field is a calculated total field in Cayuse 424, but is editable within Cayuse SP. This field is used in reporting and should only be overwritten if necessary, for reporting.
- Editing an Autofill budget within Cayuse SP is not recommended. To make changes, access the paired Cayuse 424 proposal and edit its budget.
- When the budget type is Autofill, the Effective Rate is Autofilled from Cayuse 424 and cannot be edited within Cayuse SP. Access the paired Cayuse 424 proposal and edit its budget to make any necessary changes.