

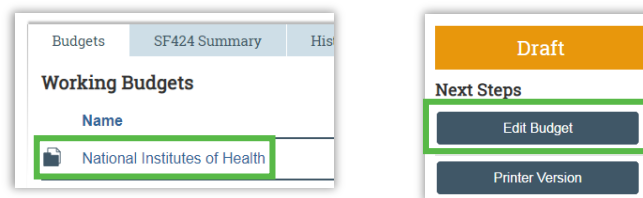


Complete a Budget

After you create a funding proposal, select a sponsor, and click **Save** on the initial page, the system automatically creates a primary sponsor budget. Only users with the Salary Access role can view and edit budgets and budget attachments, export budgets, and see salary information. If the funding proposal will be submitted to a federal sponsor via system-to-system, ensure the funding proposal and budget are complete prior to creating the SF424. Information from the funding proposal and budget auto-populate the SF424 pages. Each time the **Create-Update SF424** activity is used, it overrides the fields in the SF424 with the information in the funding proposal and budget. If changes are needed, update the funding proposal or budget first, and then execute the **Create-Update SF424** activity. Review the *Create or Update SF424 Forms* job aid for more information.

1. Open the Budget

On the funding proposal workspace, navigate to the Budgets tab and click the name of the primary sponsor budget. On the budget workspace, click **Edit Budget**.



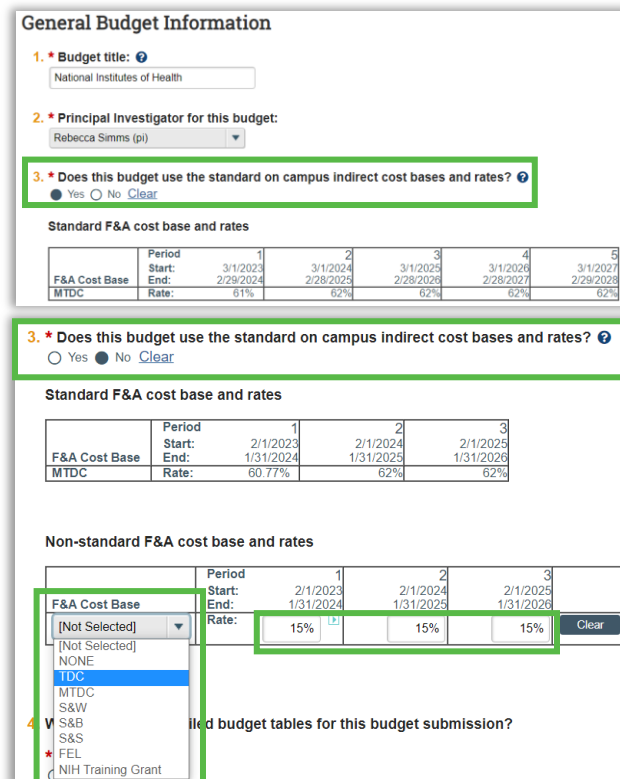
2. Enter General Budget Information

On the first page of the budget, enter or update the general budget information, including:

- The option to enter non-standard F&A cost base and rates
- Choice of cost categories to complete detailed budget tables (See Step 6)
- Salary cap
- Inflation rates

Select standard F&A cost bases for on-campus research, instruction/training, and other sponsored activity project types. (The project type is derived from the purpose indicated earlier on the funding proposal.) For all other types of projects, and those which are off-campus, non-standard rates should be used.

If the F&A is not standard, such as the sponsor does not allow F&A or limits the amount, select **No** to the *Does this budget use the standard on campus indirect cost bases and rates* question. Click the down arrow to select the appropriate F&A Cost Base and enter the F&A rate for each project period. Review the *CERES Research*





Community Grants Reference Guide for information on requesting an F&A waiver.

For Industry Clinical Trials: Select **No** to the standard on campus rates question and manually enter the clinical trial F&A rate for each period in the non-standard F&A cost base and rates table. Submission of an F&A Waiver is **not** necessary in these cases.

When finished, click **Continue**.

3. Add NU Personnel with Committed Effort

On the *Personnel Cost Definition* page, click **Import Proposal Personnel** to import the PI and all NU personnel who were added to the proposal's Personnel page as "Senior/Key person on the proposal" or as "Other personnel."

Click the "Update" button next to each person to check or update their information, if needed, and then click **Continue**.

Salaries for investigators are loaded from MyHR and annualized to standardize rates across all appointment types and lengths, prior to effort month calculations on the budget.

Note: Entering personnel on the funding proposal and importing them auto-populates more information than adding them manually.

To add **TBD** personnel, click **Add**, select "Staff Member To Be Determined" in Q1, complete the remaining fields in the form, and click **OK**.

The screenshot displays two overlapping web pages from the CERES system. The top page, titled 'Personnel Cost Definition' for proposal BU00000685, features a green box around the 'Import Proposal Personnel' button. The bottom page, for proposal BU00005887, shows a table of personnel costs with a green box around the 'Update' button. A modal dialog box titled 'Edit Personnel Cost' is open, showing a form with the following fields: 1. Staff member (dropdown), 2. Role: PD/PI, 3. Appointment: 12 months (dropdown), 4. Budget summer and academic effort separately? (radio buttons for Yes/No, with 'Clear' link), 5. Annualized salary (text input), 6. Apply inflation rate: Yes (selected) / No / Clear, 7. Current Salary on Profile: \$85,000.00 (text input). The dialog box has 'Required' text and 'OK', 'OK and Add Another', and 'Cancel' buttons at the bottom.



4. Edit Personnel Costs

On the *Personnel Costs* page, click **Edit**. Type the planned effort and salary requested months for each person.

Effort Mos: The total number of effort months for this investigator, including any cost shared effort months.

Salary Requested Mos: The number of effort months for which salary is being requested from the sponsor.

The two numbers will match when the sponsor is being asked to fund all the investigator's effort on the project. If the effort months are higher than the salary requested months, the difference is cost shared.

Note: You can budget a person's effort for the entire calendar year or distribute it between summer and academic months by selecting **Yes** to the "Budget summer and academic effort separately?" question by on the previous page.

Personnel Costs	
<input type="button" value="Save"/>	Period: Period 1 Start: 3/1/2023 End: 2/29/2024 Duration: 12.00
	Person: Rebecca Simms (pi) Role: PD/PI
	Effort Mos.: 12 Sal Req Mos.: 12 FB Rate: 24.5 % Annualized Sal.: \$135,000.00 Monthly Rate: \$11,250.00
	SM Effort Mos.: 4 SM Sal Req Mos.: 4 AY Effort Mos.: 8 AY Sal Req Mos.: 8 FB Rate: 24.5 % Annualized Sal.: \$75,000.00 Monthly Rate: \$6,250.00
Person: Alex Adesina Role: Faculty	Budgeted for calendar year Budgeted separately for summer months and academic months

5. Add General Costs

On the *General Cost Definition* page, add line items for general costs not accounted for on detailed budget tables. Click Add, select the general cost type from the drop-down list, add the amount for the item, and enter a description. Click **OK**. Click **Continue** once you have added all the general costs.

Note: The description field validates based on the type of general cost type added to the budget. Only the general cost type "Equipment" requires a description to be entered. While not all general cost types require a description, it may be helpful for later reference.

For items that you indicate should not have inflation applied, the amounts can be edited directly on the *General Costs* page. The amounts for the line item can be edited in each period instead of being automatically calculated with inflation.

General Cost Definition

1. General costs:

Cost Type	Description	Cost

Add General Cost

1. * General cost type: Consultant Services

2. Cost: 25000

3. Description: Spectrography Consulting Services

4. Apply Inflation: Yes No

5. Include in Facilities & Administrative Costs calculations? Yes No

General Costs

General Cost Definition	Period 1	Period 2
Cost Type: Materials and Supplies	\$5,000.00	\$4,000.00
Description:		
General Cost Total:	\$5,000.00	\$4,000.00



6. Complete Detailed Budgets

If you selected **Yes** to include a detailed budget on the *General Budget Information* page for either Travel or Trainee costs, additional financial tabs populate in the Left Navigator.

For example, on the *Travel Cost Definition* page, add the travel costs. Include a description, select whether it is foreign travel or not, and include the base cost. Click **OK**.

On the *Travel Costs* page, click **Show Quantity** to edit the number of trips and the number of people per trip. The cost totals will automatically update (Base Cost x # Trips x # People per Trip).

Travel Costs	
Show Quantity	Period: Period 1
	Start: 2/1/2023
	End: 1/31/2024
	Duration: 12.00
Description: Domestic travel to Chesapeake ...	Total Units: 2
	Unit Cost w/in: \$2,500.00
	Total: \$5,000.00
Domestic Travel Total:	\$5,000.00
Foreign Travel Total:	\$0.00
Travel Cost Total:	\$5,000.00

7. Finish the Budget

On the last page, click **Finish**.

Note: For non-system to system proposals, add the budget justification here. For system-to-system proposals, upload the budget justification in the appropriate spot on the SF424.

Attachments:

1. Attachments: ⓘ

+ Add

Name

There are no items to display

Exit Save **Finish**

You are returned to the budget workspace. You can continue to edit the budget until you submit it for Department Review.