Creating a Budget

Do not complete the InfoEd budget tab for the following projects:

- ISMMS (i.e., internally) funded
- Projects in which the extramural funding agency provides funding by milestone (i.e., per subject or per sample) payment. Examples are pharmaceutical sponsored multicenter clinical trials, NIH CALGB protocols or biotech companies paying per sample.
- No cost extensions

In the InfoEd Setup Questions tab, you would choose “Non-S2S, no budget.” By doing so, you will not have an option to complete a budget tab.
ASC – **Time Saver Alert! Excerpt -**

[ ] 15. Budget Tab on InfoEd: Would you like to data enter **less** budget information?

[ ] a. **Non-Federal Competitive (Non-S2S) Projects** – Only enter Y1 budget; enter each person individually and one cumulative sum for all Other than Personnel Costs (OTPS) except subaward category

[ ] b. **Non-Federal Non-Competitive (Non-S2S) Projects** - Enter budget for upcoming year only; same data entry 15a.

[ ] c. **Federal/NIH Competitive Detailed Budget/Non Modular (S2S) Projects** – Must enter complete detailed budget for each year

[ ] d. **NIH Competitive Modular (S2S) Projects** – Enter budget for each year; enter cumulative amounts for all Other than Personnel Costs (OTPS), graduate student costs, **and** all F&A \ excludable costs individually (e.g. equipment, patient care costs)

[ ] e. **Federal Competitive Multi-Project / NIH ASSIST (Non-S2S) Projects** – Only enter Y1 budget; enter amounts in each project/core folder; enter cumulative amounts for all Other than Personnel Costs (OTPS), graduate student costs, **and** all F&A excludable costs individually (e.g., equipment, patient care costs)

[ ] f. **Federal Non-Competitive (Non-S2S) Projects** – Enter budget for upcoming year only; same data entry as 15d.

[ ] g. **ISMMS as the Subawardee: All (Non-S2S) Projects** – Enter budget for upcoming year only. For non-federal, same data entry as 15a or 15b. For federal, same data entry as 15d or 15f.
Budget

Initial Budget Tab

Option to enter budget information on this initial screen or on period tabs.
Budget
Adding Personnel Costs

Must add the personnel first before you add costs associated with them. Add personnel on the Personnel tab or the Budget Items Tab by typing a name in the progressive text box.

IMPORTANT - Project with subawards? Always add the subaward PI first before other personnel at the subaward site.
Budget

Adding Personnel Costs

Add effort and salary costs by clicking on the Detail folder by person’s name.
Steps to Adding Personnel Costs for Key Personnel

1. Click on Detail.
3. Add Calendar Months.
4. Another option is to change to Percent Effort in the drop down menu to calculate.
5. Select Mount Sinai’s Fringe Benefit rate from the drop down arrow.
6. Another option if the funding agency requires a fringe amount that is less than Mount Sinai’s, data enter the amount instead.
7. Click on Save or Save and Close.

Completed

Note:
Even though the user entered info in Period 1, the data is populated for all the years.
Not needed? Simply delete or change it.
Steps to Adding Personnel Costs for Non Key Personnel

1. Click on Detail.
2. If you have more than one TBD position, include the # of positions.
3. Add Calendar Months
4. Another option is to change to Percent Effort in the drop down menu to calculate.
5. Add requested salary, NOT the base salary.
6. Select Mount Sinai’s Fringe Benefit rate from the drop down arrow.
7. Another option if the funding agency requires a fringe amount that is less than Mount Sinai’s, data enter the amount instead.
8. Click on Save or Save and Close.

Note:
Even though the user entered info in Period 1, the data is populated for all the years.

Not needed? Simply delete or change it.
Adding Non-Personnel Costs

Enter all other costs in the “Non-Personnel Costs” section except Personnel from ISMMS or Personnel from subawards.

**Do enter the consulting costs in the Non-Personnel Costs section.**

Option to enter items in bulk or individually.
Steps to Adding Bulk Entry Non Personnel Costs

1. Click on Add Bulk Entry.
2. Option to add a description (e.g., lab supplies).
3. Add the amount.
4. Select Budget Category from drop down.
5. Repeat 2-4 in other rows to add more costs.
6. Click on Add to Save.
Budget

Adding Non-Personnel Costs - Option of entering costs individually (i.e., not bulk entry).

Initial Budget Tab

Steps to Add(ing) Items in Non Personnel Costs

1. Select a Budget Category from drop down.
2. Click on Add Item.
3. Add an Amount.
4. Click on Save or Save and Close.

Note:
When a user enters $ amount in Period 1 only, the data is populated for all the years.

Not needed? Simply delete or change it.
InfoEd Budget Items Excluded from Federal Overhead

Be careful to pick the correct category from the “Budget Category.”

<table>
<thead>
<tr>
<th>Alterations and Renovations</th>
<th>Outpatient Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grad. Student Tuition and Fees (NOT training grants)</td>
<td>Participant Tuition &amp; Fees (Training Grants Only)</td>
</tr>
<tr>
<td>Inpatient Costs</td>
<td>Purchased Equipment</td>
</tr>
<tr>
<td>Other Tuition and Fees</td>
<td>Purchased Equipment Software</td>
</tr>
</tbody>
</table>

Come to [GCO 202 – Sponsored Project Budgeting Part 2](#) to learn more about these categories.
When Funding Source is Federal

For projects where the funding source is Federal, like NIH modular or non-modular grants or a grant where Mount Sinai is the subaward (i.e., prime institution submits to the NIH and Mount Sinai is on that institution’s project), you do not need to change any information. Keep the default as is.
Use “Manual F&A” when the funding source is not federal or you wish to manually enter.

Steps to Adding F&A via Manual Entry
1. Click on Manual F&A.
2. To calculate F&A based on a rate, add the Rate and the Base. The F&A Amount will calculate based on this info.
3. Another option is add the Amount instead (i.e., w/o rate and base).
4. Type in Indirect Cost Type. “General” is a fine option for non-federal research grants.
5. Click on Save.
6. Data enter future years.

Note:
As is the current process, continue to use the already set (i.e., default) F&A rate, rather than manual entry, for on campus federal research grants.
Modular Budget

Resources

GCO 202: NIH Modular Grant Budgets

NIH Modular Research Grant Applications
Modular Budget

Default Set to 10 Modules, 10 x 25,000 = $250,000

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### Modular Budget

<table>
<thead>
<tr>
<th>Year</th>
<th>Direct Base (Sub Contract F&amp;A)</th>
<th>Modules</th>
<th>Amount</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$123,800.00</td>
<td>10</td>
<td>$250,000.00</td>
<td>$-120,100.00</td>
</tr>
<tr>
<td>2</td>
<td>$123,000.00</td>
<td>10</td>
<td>$250,000.00</td>
<td>$-120,100.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Direct Base</th>
<th>Detail Base</th>
<th>Module Directs</th>
<th>F&amp;A Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$123,000.00</td>
<td>$119,400.00</td>
<td>10</td>
<td>$244,200.00</td>
</tr>
<tr>
<td>2</td>
<td>$123,000.00</td>
<td>$119,400.00</td>
<td>10</td>
<td>$244,200.00</td>
</tr>
</tbody>
</table>

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Completed

Please change the default “Modules” setting to the appropriate amounts.
Keep the default on the F&A tab. User does not make any changes to this tab.
Budget – Justification

Select as appropriate. Select “Personnel Justification” for Modular Budgets.