

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.

Budget

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.

Option to enter budget information on this initial screen or on period tabs.

The screenshot displays the 'ACS Project' budget management interface. The top navigation bar includes 'Done', 'Save', 'Help', 'History', 'Support', and 'Show'. The main header shows 'ACS Project' and 'Proposal PD17-03940'. A sidebar on the left contains navigation options: 'Budget' (highlighted with a red box), 'Period 1', 'Period 2', 'Period 3', 'F&A', 'Cost Sharing', 'Justifications', 'Versions', and 'Setup'. The main content area is titled 'Budget' and includes a 'Source View' dropdown set to 'Project', a 'Rollup subprojects' checkbox, and a 'Complete Budget' button. Below this, the 'Project Period' is defined with 'Start: 01-Feb-2018' and 'End: 31-Jan-2021'. The 'Budget Summary [hide]' section contains a table with columns for 'Year/Period', 'Increment', 'Start', 'End', 'Type', 'Status', 'Sponsor', 'Cost Sharing', and 'Project'. The table shows three periods, all with a status of 'Pending' and a total cost of \$0.00. The 'Personnel [hide]' section features a table with columns for 'Name', 'Period 1', 'Period 2', 'Period 3', and 'Direct Costs'. A 'Detail' button (red box) is next to the entry for 'Gottlieb, Allison PD/PI'. Below the table is an 'Add New Profile' button and a search field. The 'Non-Personnel [hide]' section has an 'Add Bulk Entry' button (red box) and a table with columns for 'Category', 'Period 1', 'Period 2', 'Period 3', and 'Direct Costs'. An 'Add Item' button (red box) is located below the table. The 'SubAwards [show]' and 'Subprojects[show]' sections are also visible. At the bottom, a summary table shows 'Total Project Direct Costs' as \$0.00, 'Project F&A' as \$0.00, and 'Total Project Costs' as \$0.00.

Year/Period	Increment	Start	End	Type	Status	Sponsor	Cost Sharing	Project
1	1	01-Feb-2018	31-Jan-2019	NOT THIS ONE *	Pending	-	-	-
2	2	01-Feb-2019	31-Jan-2020	NOT THIS ONE *	Pending	-	-	-
3	3	01-Feb-2020	31-Jan-2021	NOT THIS ONE *	Pending	-	-	-
Total						\$ 0.00	\$ 0.00	\$ 0.00

Name	Period 1	Period 2	Period 3	Direct Costs
Gottlieb, Allison PD/PI	-	-	-	\$ 0.00
Subtotal Personnel:				\$ 0.00

Category	Period 1	Period 2	Period 3	Direct Costs
No records to display.				
Subtotal Non-Personnel:				\$ 0.00

	Period 1	Period 2	Period 3	Total Costs
Total Project Direct Costs:	-	-	-	\$ 0.00
Project F&A:	0.00	0.00	0.00	0.00
Total Project Costs:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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.

Initial Budget Tab

Budget Source View: Project Rollup subprojects: Complete Budget

Project Period: Start: 01-Feb-2018 End: 31-Jan-2021

Budget Summary [hide]

Year/Period	Increment	Periods [hide]		Type	Status	Sponsor	Cost Sharing [show]		Project [hide]	
		Start	End				Total	Total	Directs	F&A
1	1	01-Feb-2018	31-Jan-2019	NOT THIS ONE *	Pending	-	-	-	-	-
2	2	01-Feb-2019	31-Jan-2020	NOT THIS ONE *	Pending	-	-	-	-	-
3	3	01-Feb-2020	31-Jan-2021	NOT THIS ONE *	Pending	-	-	-	-	-
Total						\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Personnel [hide]

Name	Period 1	Period 2	Period 3	Direct Costs
Gottlieb, Allison PD/PI	-	-	-	\$ 0.00
Subtotal Personnel:				\$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00

Add New Profile -- Select Type -- -- Select Role -- Add Person

Non-Personnel [hide] Add Bulk Entry

Category	Period 1	Period 2	Period 3	Direct Costs
No records to display.				
Subtotal Non-Personnel:				\$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00

Select Budget Category Add Item

SubAwards [show]

Subprojects[show] Import as Subproject

	Period 1	Period 2	Period 3	Total Costs
Total Project Direct Costs:	-	-	-	\$ 0.00
Project F&A:	0.00	0.00	0.00	0.00
Total Project Costs:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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

Budget

Initial Budget Tab

Adding Personnel Costs

Add effort and salary costs by clicking on the Detail folder by person's name.

The screenshot shows the 'Budget' application interface. The 'Budget' folder in the left sidebar is highlighted with a red box. The main content area displays the 'Personnel' section, where the 'Detail' button for 'Gottlieb, Allison' is highlighted with a red box. The interface includes a 'Budget Summary' table, a 'Personnel' table, and a 'Subtotal Personnel' row. The 'Personnel' table has columns for Name, Period 1, Period 2, Period 3, and Direct Costs. The 'Subtotal Personnel' row shows \$0.00 for all periods and Direct Costs. Below the 'Personnel' section is the 'Non-Personnel' section, which is currently empty. The 'SubAwards' and 'Subprojects' sections are also visible at the bottom of the interface.

Year/Period	Increment	Start	End	Type	Status	Sponsor Total	Cost Sharing Total	Project Directs	F&A	Total
1	1	01-Feb-2018	31-Jan-2019	NOT THIS ONE *	Pending	-	-	-	-	-
2	2	01-Feb-2019	31-Jan-2020	NOT THIS ONE *	Pending	-	-	-	-	-
3	3	01-Feb-2020	31-Jan-2021	NOT THIS ONE *	Pending	-	-	-	-	-
Total						\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Name	Period 1	Period 2	Period 3	Direct Costs
Gottlieb, Allison PD/PI	-	-	-	\$ 0.00
Subtotal Personnel:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Category	Period 1	Period 2	Period 3	Direct Costs
No records to display.				
Subtotal Non-Personnel:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

	Period 1	Period 2	Period 3	Total Costs
Total Project Direct Costs:	-	-	-	\$ 0.00
Project F&A:	0.00	0.00	0.00	0.00
Total Project Costs:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Demo 3 - Budget

Initial Budget Tab

Adding Personnel Costs – Key Personnel

Steps to Adding Personnel Costs for Key Personnel

1. Click on Detail.
2. Add Base Salary.
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.

Period	Role	Base Salary	Calendar	Academic	Summer	Salary	Fringe Benefits	Total
1	PD/PI	0.00	0.00	0.00	0.00	0.00	0.00	\$ 0.00
2	PD/PI	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total						\$ 0.00	\$ 0.00	\$ 0.00

Completed

Period	Role	Base Salary	Calendar	Academic	Summer	Salary	Fringe Benefits	Total
1	PD/PI	185,000.00	6.00	0.00	0.00	92,500.00	Federal Fring... 25,900.00	\$ 118,400.00
2	PD/PI	185,000.00	6.00	0.00	0.00	92,500.00	Federal Fring... 25,900.00	118,400.00
Total						\$ 185,000.00	\$ 51,800.00	\$ 236,800.00

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.

Demo 3 - Budget

Adding Personnel Costs – Non Key Personnel

Initial Budget Tab

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.

Non-Key Personnel

1 Detail TBD, TBD 1 Research Coordinator

Subtotal Personnel: \$ 0.00 \$ 0.00 \$ 0.00

Budget Detail for: TBD, TBD 1

Detail Appointments Justifications Cost Sharing Effort Periods

Committed Effort Save and Close 7 Save Close

Costs by "Budget Period" Person Months 4 Show Calculation Details

Period	Role	Number of Personnel	Calendar	Academic	Summer	Salary	Fringe Benefits	Total
1	Research Coordinator	2	0.00	0.00	0.00	0.00	0.00	\$ 0.00
2	Research Coordinator	%	0.00	0.00	0.00	0.00	0.00	0.00
Total						\$ 0.00	\$ 0.00	\$ 0.00

Completed

Costs by "Budget Period" Person Months Show Calculation Details

Period	Role	Number of Personnel	Calendar	Academic	Summer	Salary	Fringe Benefits	Total
1	Research Coordinator	0	6.00	0.00	0.00	17,000.00	Non-Federal F... 4,845.00	\$ 21,845.00
2	Research Coordinator	%	6.00	0.00	0.00	17,000.00	Non-Federal F... 4,845.00	21,845.00
Total						\$ 34,000.00	\$ 9,690.00	\$ 43,690.00

➔ Not needed? Simply delete or change it.

Budget

Initial Budget Tab

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.

Category	Period 1	Period 2	Period 3	Direct Costs
No records to display.				
Subtotal Non-Personnel:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Select Budget Category

Budget

Initial Budget Tab

Adding Non-Personnel Costs - Option of entering many costs at once in “Add Bulk Entry.”

Non-Personnel [hide] Add Bulk Entry

Category	Period 1	Period 2	Direct Costs
No records to display.			
Subtotal Non-Personnel: \$ 0.00 \$ 0.00 \$ 0.00			

Select Budget Category Add Item

Non-Personnel Costs X

Bulk Entry Add

Description / Budget Category

	Period 1	Period 2
<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Select Budget Category		
<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Select Budget Category		
<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Select Budget Category		

Completed

Non-Personnel [hide] Add Bulk Entry

Category	Period 1	Period 2	Direct Costs
Detail Purchased Equipment	\$ 1,800.00	-	\$ 1,800.00 Delete
Detail Supplies	6,000.00	6,000.00	12,000.00 Delete
Detail Travel-Foreign	3,000.00	3,000.00	6,000.00 Delete
Subtotal Non-Personnel: \$ 10,800.00 \$ 9,000.00 \$ 19,800.00			

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

Initial Budget Tab

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

The screenshot shows the 'Non-Personnel Costs' interface. At the top, there is a 'Non-Personnel [hide]' header with an 'Add Bulk Entry' button. Below this is a table with columns for 'Category', 'Period 1', 'Period 2', and 'Direct Costs'. The table is currently empty, displaying 'No records to display.' Below the table, there is a 'Subtotal Non-Personnel:' row showing \$ 0.00 for Period 1, \$ 0.00 for Period 2, and \$ 0.00 for Direct Costs. At the bottom, there is a 'Select Budget Category' dropdown menu and an 'Add Item' button, which is circled with a blue '1'. A blue '2' is also present near the 'Add Item' button.

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.

Completed

The screenshot shows the 'Non-Personnel Costs' interface after a successful entry. The table now contains one record for 'Supplies'. The 'Period 1' column shows \$ 5,500.00, the 'Period 2' column shows \$ 5,500.00, and the 'Direct Costs' column shows \$ 11,000.00. The 'Subtotal Non-Personnel:' row also reflects these values. The 'Add Item' button is still visible at the bottom.

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.

Adding Non-Personnel Costs When Funding Source is Federal

InfoEd Budget Items Excluded from Federal Overhead

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

Alterations and Renovations	Outpatient Costs
Grad. Student Tuition and Fees (NOT training grants)	Participant Tuition & Fees (Training Grants Only)
Inpatient Costs	Purchased Equipment
Other Tuition and Fees	Purchased Equipment Software

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.

Budget

F&A Tab - Manual F&A

Use "Manual F&A" when the funding source is not federal or you wish to manually enter.

Done Save Help History Support Show

F&A Source View: Project

Calculation rate method: Prevailing Blended

Institution Base/Target Scheme: On Campus MTDC Show \$208,500.00 Drift \$0.00

Scheme: On Campus MTDC

Base: Rate: Rate: 0.000 Effective: 69.500 Apply **Manual F&A**

Personnel Costs

	Period 1	Period 2	Period 3	Total
Gottlieb, Allison				
Project Directs	0.00	0.00	0.00	0.00
Project F&A Base	0.00	0.00	0.00	0.00
Requested F&A	0.00	0.00	0.00	0.00
Directs & F&A Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Non-Personnel Costs

	Period 1	Period 2	Period 3	Total
Other Costs				
Project Directs	100,000.00	100,000.00	100,000.00	300,000.00
Project F&A Base	100,000.00	100,000.00	100,000.00	300,000.00
Requested F&A	69,500.00	69,500.00	69,500.00	208,500.00
Directs & F&A Total	\$ 169,500.00	\$ 169,500.00	\$ 169,500.00	\$ 508,500.00

	Period 1	Period 2	Period 3	Total
Direct Cost Totals	\$ 100,000.00	\$ 100,000.00	\$ 100,000.00	\$ 300,000.00
F&A Base Totals**	\$ 100,000.00	\$ 100,000.00	\$ 100,000.00	\$ 300,000.00
F&A Totals	\$ 69,500.00	\$ 69,500.00	\$ 69,500.00	\$ 208,500.00
Grand Totals	\$ 169,500.00	\$ 169,500.00	\$ 169,500.00	\$ 508,500.00

F&A Breakdown

Period	Start Date	End Date	Scheme (Indirect Cost Type)	Rate	Base	Amount	
<input checked="" type="checkbox"/> 1	01-Jan-2018	31-Dec-2018	General	69.500	100,000.00	69,500.00	<input type="button" value="Clear"/>
<input checked="" type="checkbox"/> 2	01-Jan-2019	31-Dec-2019	General	69.500	100,000.00	69,500.00	<input type="button" value="Clear"/>
<input checked="" type="checkbox"/> 3	01-Jan-2020	31-Dec-2020	General	69.500	100,000.00	69,500.00	<input type="button" value="Clear"/>
				Total	\$ 300,000.00	\$ 208,500.00	

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.

Completed

F&A Breakdown

Period	Start Date	End Date	Scheme (Indirect Cost Type)	Rate	Base	Amount	
<input checked="" type="checkbox"/> 1	01-Jan-2018	31-Dec-2018	General	10.000	100,000.00	10,000.00	<input type="button" value="Clear"/>
<input checked="" type="checkbox"/> 2	01-Jan-2019	31-Dec-2019	general	5.000	100,000.00	5,000.00	<input type="button" value="Clear"/>
<input checked="" type="checkbox"/> 3	01-Jan-2020	31-Dec-2020	general	8.000	100,000.00	8,000.00	<input type="button" value="Clear"/>
				Total	\$ 300,000.00	\$ 23,000.00	

Modular Budget

Budget

Resources

[GCO 202: NIH Modular Grant Budgets](#)

[NIH Modular Research Grant Applications](#)

Modular Budget

Default Set to 10 Modules, $10 \times 25,000 = \$250,000$

- Budget
- Modular Budget**
- F&A
- Cost Sharing
- Justifications
- Versions
- Setup

Modular Budget						
Directs						
Year	Directs less Sub Cont F&A		Modules	Amount		Gap
1	\$ 123,900.00		10	\$ 250,000.00		\$ -126,100.00
2	\$ 123,900.00		10	\$ 250,000.00		\$ -126,100.00
	\$ 247,800.00		20	\$ 500,000.00		\$ -252,200.00

F&A Basis						
Year	Detail Directs	Detail Base	Exemptions	Module Directs	Modular Base	
1	\$ 123,900.00	\$ 118,400.00	\$ 5,500.00	10	\$ 244,500.00	
2	\$ 123,900.00	\$ 118,400.00	\$ 5,500.00	10	\$ 244,500.00	
	\$ 247,800.00	\$ 489,000.00	\$ 11,000.00	20	\$ 489,000.00	

Completed

Please change the default “Modules” setting to the appropriate amounts.



Directs						
Year	Directs less Sub Cont F&A		Modules	Amount		Gap
1	\$ 123,900.00		5	\$ 125,000.00		\$ -1,100.00
2	\$ 123,900.00		5	\$ 125,000.00		\$ -1,100.00
	\$ 247,800.00		10	\$ 250,000.00		\$ -2,200.00

F&A Basis						
Year	Detail Directs	Detail Base	Exemptions	Module Directs	Modular Base	
1	\$ 123,900.00	\$ 118,400.00	\$ 5,500.00	5	\$ 119,500.00	
2	\$ 123,900.00	\$ 118,400.00	\$ 5,500.00	5	\$ 119,500.00	
	\$ 247,800.00	\$ 239,000.00	\$ 11,000.00	10	\$ 239,000.00	

Modular Budget

F&A Tab

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.

