



# VERAS PROPOSAL ASSISTANT USER'S GUIDE

Vandals Electronic Research Administration System

## Table of Contents

Introduction .....	4
Login .....	4
My Profile.....	4
My Account .....	4
Profile.....	6
Contact Management.....	6
Performance Sites .....	6
Proposal Info: a place for NSF, NIH, and other demographical information.....	6
Other System IDs: store your NIH Commons, NSF Fastlane, NASA NSPIRES, and other IDs here .....	6
Biosketch, CV, Pubs: Upload these documents here for easy access within your proposal applications, including sponsor specific versions of each type of document.....	6
Training History: provides a summary of all required compliance training for each user.....	6
Signature: store your electronic signature here .....	6
Signoff Availability: Indicate your signoff availability and add alternate signers here.....	6
Notes: A place to put notes to yourself .....	6
Help .....	6
My Workspaces .....	7
Featured Proposal Operations.....	8
Create a New Proposal .....	8
Proposal Application Sections: .....	8
General Information .....	8
Project Access and Assignments.....	8
Setup Department(s) Access .....	11
Proposal Branching .....	11
Proposal Category .....	11
Proposal Action Type.....	12
Proposal Guidelines & Basic Submission Information.....	12
General Submission Information .....	12
Type of Agreement .....	12
Proposal Guidelines .....	13
Proposal that started as limited submission concept paper, letter of intent, or preliminary proposal .....	13
Tribal Relationship .....	13
Sponsoring Entities.....	14
Sponsor Information .....	14
Sponsor .....	14
Financial Conflict of Interest (FCOI) Reminder .....	15
Responsible Conduct of Research (RCR) Reminder.....	15

Project Information .....	15
Project Type.....	15
Discipline(s).....	16
On or Off Campus?.....	16
Performance Site .....	16
Subrecipients/Service Agreements/Consultants.....	16
U of I Budget and Budget Narrative/Justification .....	18
Proposed project period .....	<b>Error! Bookmark not defined.</b>
Project Personnel.....	18
Budget.....	20
Detailed Budget / Detailed Modular Budget.....	22
Salary Cap .....	24
Fringe Rates .....	25
Maximum Allowed Support Request.....	25
Notes .....	26
A. Senior Key Personnel and.....	27
B. Other Personnel.....	27
C. Equipment.....	33
D. Travel.....	34
E. Participant Trainee Support Costs .....	34
F. Other Direct Costs .....	35
ADP / Computer Services .....	35
Subawards / Consortium / Contractual Costs.....	36
Equipment or Facility Rental/User Fees .....	36
Other Direct Costs .....	36
<i>Tuition Fee Remission/Other</i> .....	36
G. Direct Costs Total .....	37
H. Indirect Costs .....	37
I. Total Direct and Indirect Costs.....	38
J. Fees .....	38
Budget Periods.....	38
Summary.....	39
Basic Budget.....	40
Submitting a Budget .....	42
Cost Share.....	45
Cost Accounting Standards (CAS) Exemption.....	46
Program Income .....	46
Multiple Indexes.....	46

Grants.gov Submissions - Select or download opportunity packet.....	46
Merging the Budget to Sponsor Forms and Grants.gov Opportunities .....	47
Modifying the Budget .....	49
Errors/Warnings .....	49
Document Attachments .....	49
Summary Tab / Mark Complete .....	51
Non Grants.gov Proposal Documents.....	51
Research Compliance.....	52
Other.....	52
Validation Check .....	53
Signoff and Submit .....	53
View My Proposals .....	54
Start a Proposal Submission Form.....	55
Tasks .....	55
All Tasks.....	55
Study Tasks .....	56
Project Tasks .....	56
Proposal Assistant .....	56
Pro Tips and Tricks.....	58
Home button .....	58
Proposal Application: Section view/Entire view.....	58
Search User Directory.....	59
Return to Application from the Budget.....	59

# VERAS Proposal Assistant User's Guide

## Introduction

This manual will provide guidance to users throughout the life cycle of their sponsored projects - from proposal submission through award set up and project completion.

If you have questions that are not addressed in this guide, please contact [osp-web@uidaho.edu](mailto:osp-web@uidaho.edu) or call 208-885-6651.

## Login

<https://VERAS.uidaho.edu>

Use your U of I sign in credentials. If this is your first time using VERAS and you are not yet in the system, you may be directed to an account request screen where you will provide your Login Name, Last Name, First Name, and email address. The LDAP ID is your V number and will pull automatically from your U of I credentials.

Note: your login name will be the same as your U of I account (your SSO login name)

Please fill the below form giving enough information to the administrator to process your request

**Required fields**  
Note: the LDAP ID is your V# and will pull from your UI credentials.

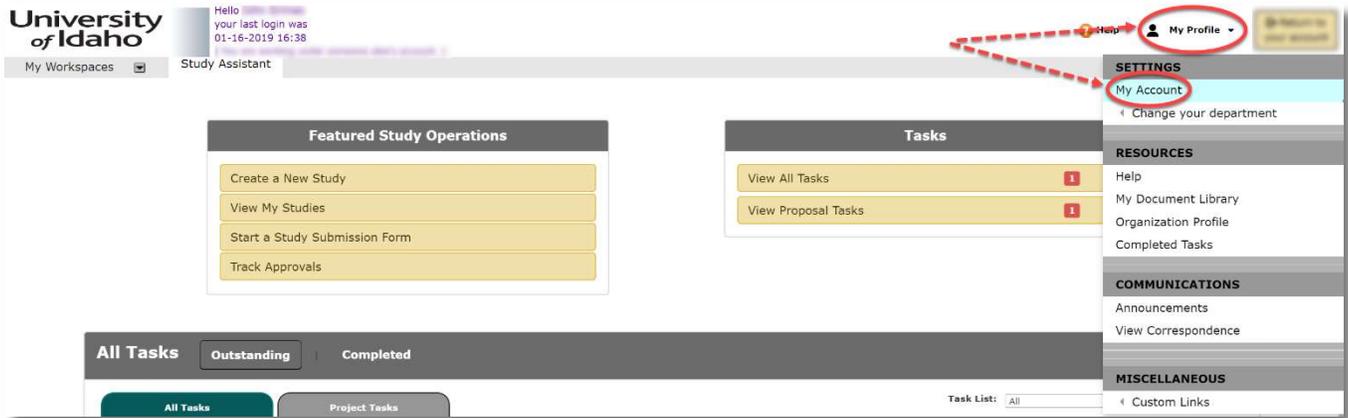
Request Department	Institution Abbrev. - Department
<input type="checkbox"/>	UI - CALS - Entomology / PlantPath / Nematology
<input type="checkbox"/>	UI - CALS - Plant Sciences
<input type="checkbox"/>	UI - CALS - Soil & Water Systems
<input type="checkbox"/>	UI - CONTROLLER - Agency-Miscellaneous
<input type="checkbox"/>	UI - M001 - Col of Letters, Arts & Social Sci.
<input type="checkbox"/>	UI - CLASS - Anthropology Lab
<input type="checkbox"/>	UI - CLASS - CLASS General Studies
<input type="checkbox"/>	UI - CLASS - CLASS North Idaho
<input type="checkbox"/>	UI - CLASS - CLASS-Hampton Center

## My Profile

### My Account

The first thing we recommend is that you update your Performance Sites information (found in the Performance Sites section of My Profile>My Account) which will flow into your proposal applications. Add all locations that you would normally use when participating in research activities; if you frequently work with an external collaborator, add them here. U of I's information is found on OSP's website: <https://www.uidaho.edu/research/faculty/resources>

See screenshots below:



From the menu options on the left, select Performance Sites, enter your information, and save:



**User Performance Site Details:**

\*Organization Name:

DUNS Number:

\*Street 1:

Street 2:

\*City:

County/Parish:

State:

Province:

\*Country:

Zip:

\*Congressional District:

Primary Location:

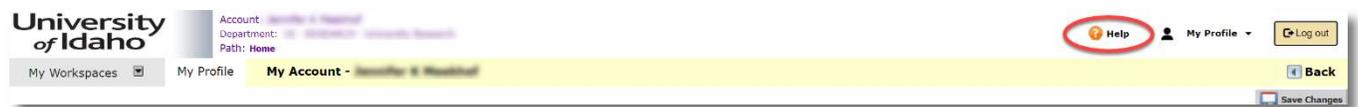
Fill in the highlighted fields and save  
Save Performance Site Info

The screenshot below shows areas in My Account in which to save information for use throughout VERAS:

<b>Profile</b>	Profile
Contact Management	Contact Management
Performance Sites	Performance Sites
Proposal Info	Proposal Info: a place for NSF, NIH, and other demographical information
Other System IDs	Other System IDs: store your NIH Commons, NSF Fastlane, NASA NSPIRES, and other IDs here
Biosketch, CV, Pubs	Biosketch, CV, Pubs: Upload these documents here for easy access within your proposal applications, including sponsor specific versions of each type of document
Training History	Training History: provides a summary of all required compliance training for each user
Medical Licenses	
Signature	Signature: store your electronic signature here
Signoff Availability	Signoff Availability: Indicate your signoff availability and add alternate signers here
Notes	Notes: A place to put notes to yourself

## Help

This area provides access to help tips and frequently used forms for all modules within VERAS: Conflict of Interest, IACUC, IRB, Pre Award, and Post Award

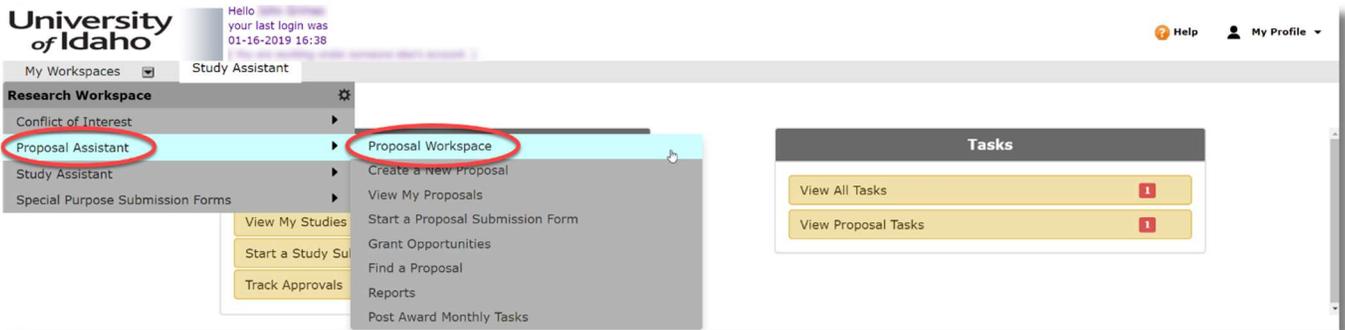


The options currently available are shown in the screenshot below:

<b>Award Forms</b> <ul style="list-style-type: none"> <li>● Index Request Form</li> <li>● Preliminary (Early) Setup Form</li> </ul>	<b>IRB Submissions</b> <ul style="list-style-type: none"> <li>● IRB Protocol Submission Guide</li> <li>● PI How To - IRB Amendment Request Form</li> <li>● IRB Reviewer Manual</li> </ul>
<b>Board Member Tasks</b> <ul style="list-style-type: none"> <li>● IACUC Board Member Manual</li> <li>● IACUC Board Member Submissions Manual</li> <li>● IACUC Reviewer Training Manual</li> </ul>	<b>Proposal Forms</b> <ul style="list-style-type: none"> <li>● F&amp;A Waiver Request</li> <li>● Subrecipient Commitment Form - BSU, ISU, NNU, OSU, and WSU version</li> <li>● Subrecipient Commitment Form - standard version</li> <li>● Voluntary Committed Cost Share Request Form</li> </ul>
<b>Budgets</b> <ul style="list-style-type: none"> <li>● NIFA Rate Comparison Budget</li> <li>● Simple Budget Template</li> </ul>	<b>Subaward Forms</b> <ul style="list-style-type: none"> <li>● Instructions for Subawardee</li> <li>● Subaward &amp; Amendment Request Instructions</li> <li>● Subaward Amendment Request</li> <li>● Subaward Attachment 3A</li> <li>● Subaward Attachment 3B</li> <li>● Subaward Attachment 3B Pg 2</li> <li>● Subaward Checklist for UI PI</li> <li>● Subaward Request Form</li> </ul>
<b>Conflict of Interest</b> <ul style="list-style-type: none"> <li>● Quick Guide to COI Reporting</li> <li>● COI Detailed Instruction Set</li> <li>● Annual vs Project vs Revision - COI</li> </ul>	<b>VERAS Manuals</b> <ul style="list-style-type: none"> <li>● Budget Preparation Guide</li> <li>● Proposal Assistant User's Guide</li> </ul>
<b>Cost Transfers, Effort Reporting and Other Guidance</b> <ul style="list-style-type: none"> <li>● Budget and Cost Transfer Calculator for Grants</li> <li>● Fly America Act Waiver</li> <li>● Grant e-code Lookup Tool</li> <li>● OSP Payroll Cost Transfer Form</li> <li>● Sample OSP Payroll Cost Transfer Form</li> </ul>	
<b>Getting Started and Basics</b> <ul style="list-style-type: none"> <li>● How to Print Documents</li> <li>● Introduction to My Assistant and Study Assistant</li> <li>● Uploading and Editing Biosketch/CV/Pub</li> <li>● VERAS Quick Tips</li> </ul>	
<b>How Tos/Quick Tips</b> <ul style="list-style-type: none"> <li>● How to address a stipulation - PI</li> <li>● How to start a protocol application, amendment, or continuing review form</li> </ul>	
<b>IACUC Submissions</b> <ul style="list-style-type: none"> <li>● IACUC Protocol VERAS Quick Guide</li> <li>● Collaboration Agreement - Institutional</li> <li>● Collaboration Agreement - Non-Research</li> <li>● Collaboration Agreement - Private Owned Animals</li> <li>● Collaboration Agreement - Private Owners Animal and Land</li> <li>● Collaboration Agreement - Wildlife/Private Land</li> </ul>	

## My Workspaces

The first time you sign in, your default workspace will be the Study Assistant. To navigate to the Proposal Workspace place your cursor over My Workspaces, then highlight and select Proposal Assistant>Proposal Workspace. After your initial sign in, your default workspace will be the last one you accessed.

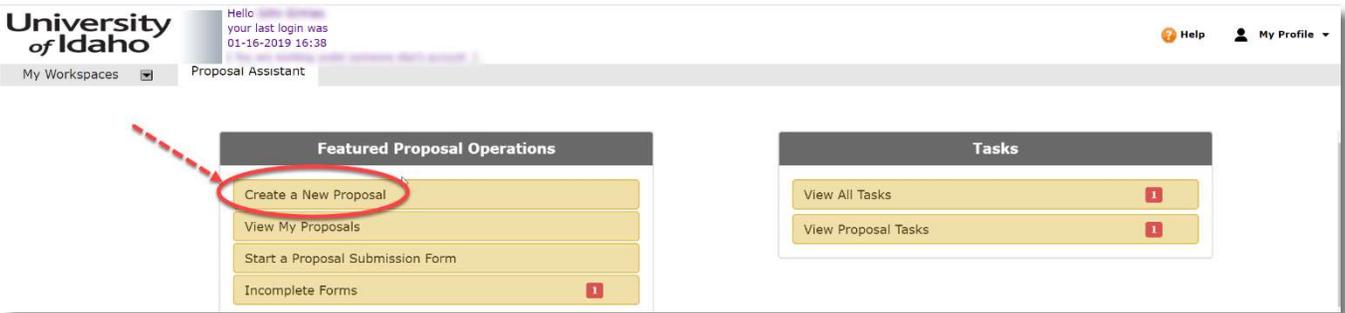


Once in the Proposal Workspace, you will see the following:

# Featured Proposal Operations

## Create a New Proposal

To begin a new proposal, select **Create a New Proposal**:



The following tabs and buttons are available throughout the proposal application:



## Proposal Application Sections:

To progress through the application sections, complete the questions in each section and select



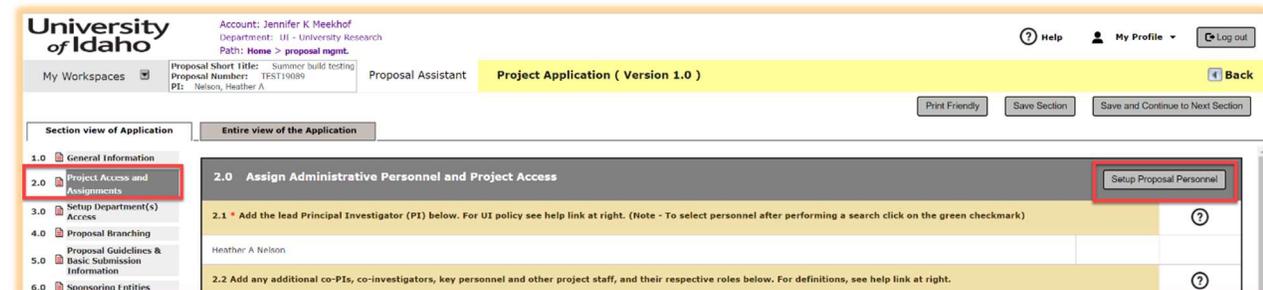
**Please note:** application questions with a red asterisk \* are required but you will not have to complete most of them until you are ready for submission and sign-off. This allows you to skip questions that you are not ready to answer initially.

### General Information

- Enter your full title and short title (how you will commonly refer to your project); these questions must be answered in order to continue to the next section.

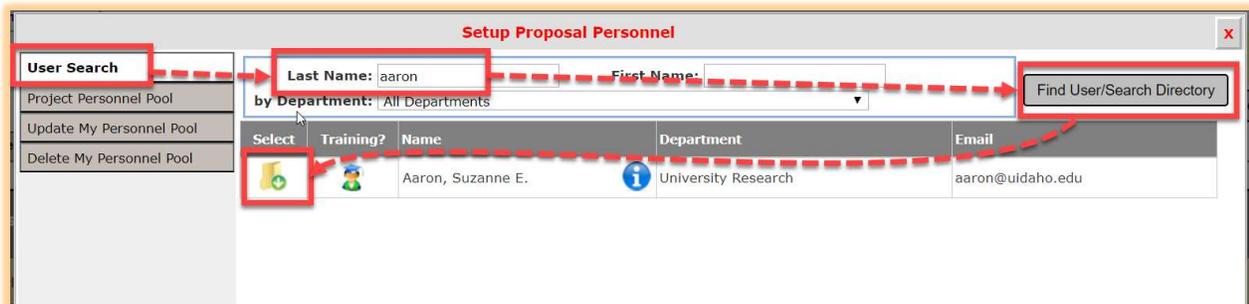
### Project Access and Assignments

- Key personnel, co-PIs, co-investigators, additional project staff, project contacts, sponsored programs administrators (SPAs), and department editors (DGAs) are added in this section by clicking on the Setup Proposal Personnel button:

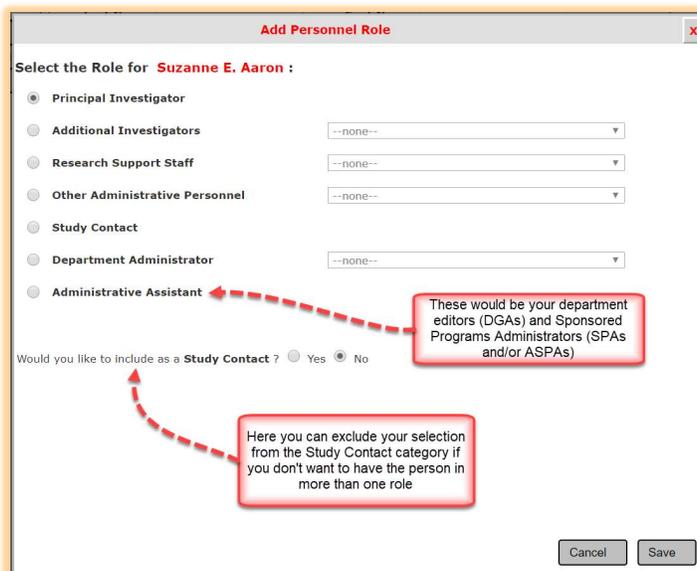


From here you have several options:

1. Manually add all of your project personnel using the **User Search** menu. Enter the name of the person you wish to add, select **Find User/Search Directory**, click on the **Select** icon,



then add the personnel role from the box that pops up and save your selection:



2. Select, Create, Update, or Delete a **Project or Study Personnel Pool**, which allows you quick access to adding a group of personnel whenever you are creating a new proposal or study.
  - a. To select a pool you will first have to create one by first entering all of the people you would like to have in your pool (using the process in step 1 above), and then selecting **Create My Personnel Pool**, entering a name for the pool, and selecting **Save**.

Setup Proposal Personnel X

User Search

Project Personnel Pool

**Create My Personnel Pool**

Update My Personnel Pool

Delete My Personnel Pool

i

**Create My Personnel Pool** allows you to save the personnel defined in the **Selected Proposal Personnel** (section below) to a named pool for future reuse on other studies.

Reference name of the Pool you are creating VERAS team #1

Save

**Selected Proposal Personnel:**

**Principal Investigator**

	Name	Role
X	Meekhof, Jennifer K	Principal Investigator

**Additional Investigators**

	Name	Role
X	Nelson, Heather A	Co-Principal Investigator

**Research Support Staff**

	Name	Role
X	Kirkham, Steven A.	Other Professional

**Primary Research Administrator**

	Name	Role
No Personnel has been selected for this group.		

**Other Administrative Personnel**

	Name	Role
X	Bilderback, Ann-Marie	Project Admin Personnel

**Contact**

	Name	Role
X	Meekhof, Jennifer K	Study Contact

**Department Administrator**

	Name	Role
X	LaBolle, Larissa Dawn	Fiscal Officer

**Administrative Assistant**

	Name	Role
X	Bergeron, Kelly	Departmental Editor
X	Gram, Jena Diane	Departmental Editor

Clear Key Proposal Personnel

Close Setup of Proposal Personnel

- Once you have created one or more personnel pools you will be able to select your pool from the dropdown menu in **Project Personnel Pool**

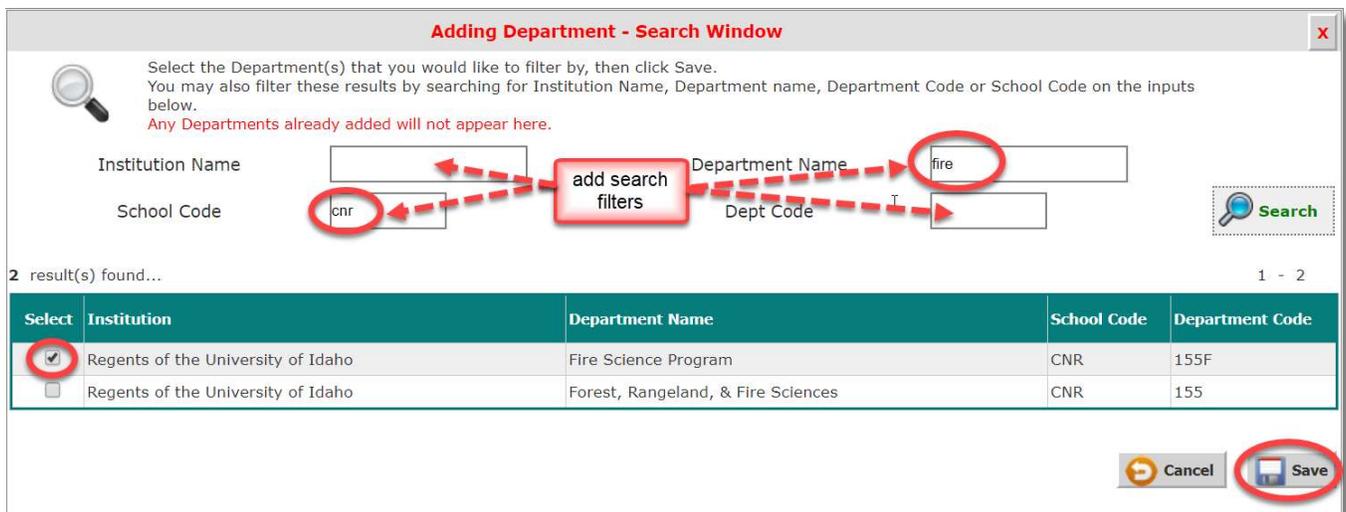


- After you select your pool, click **Close Setup of Proposal Personnel** and your pool will populate into the User section of your proposal or protocol application
- You can also update and delete your personnel pools using the menu options within the **Setup Proposal Personnel** or **Setup Study Personnel** screen.

### Setup Department(s) Access

- The PI's home department (the timesheet department) will initially pull in to the form as the primary department. If applicable, add departments for each co-PI. The primary department should be the department, institute, or center that will provide administrative responsibility for the project.
  - This is helpful when there are multiple departments collaborating on a project
  - Note: if the PI is changed, the department access questions (section 3.0) may need to be updated. These values do not update automatically*

To add a department, select  and fill out the search box:



### Proposal Branching

#### Proposal Category

- There are several categories of submissions that do not have the same requirements of a full proposal. These are defined in this section and if your project fits one of these categories, you will be prompted to provide the required information and an abbreviated proposal application.
- Depending upon your proposal category, when you select  the application will progress to the next question and subsequent sections (full proposals only) or to the sign-off and submission process (all other selections).

### Proposal Action Type

- Definitions are provided in the help tip to the right of the question
- This action type will merge into grants.gov forms such as the RR SF424

### Proposal Guidelines & Basic Submission Information

#### General Submission Information

- Enter the due date for submission to the sponsor. This will be found in the RFP/solicitation
- Select the time of day the submission must be received by the sponsor
- Select the time zone of the sponsor
  - This is important if the sponsor is located in a time zone other than Pacific
- Select **Required** or **Preferred Deadline**
  - Preferred deadline examples:
    - A PI will be travelling at the time of the required deadline and would like to submit early, or
    - A sponsor offers to provide feedback to the PI if they submit early, or
    - There is no firm due date for the proposal
- Select the submission method (i.e. how will the proposal be submitted to the sponsor?)
  - **OSP will submit:** select this when OSP will submit to the sponsor directly from VERAS as a system-to-system submission (all Grants.gov submissions) or through another sponsor system requiring AOR sign-off such as Fastlane, NASA NSPIRES, Research.gov, or Other
    - Then select which option OSP will use to submit
    - For Grants.gov submissions, the opportunity packet will be selected/downloaded later in the application in the [Grants.gov Submissions](#) section (after the Budget section)
  - **PI will submit:** select this when the PI will submit directly to the sponsor
    - Then select which option the PI will use to submit

*Submission to the sponsor should not occur until OSP has reviewed the proposal and all required approvals have been obtained*

### Type of Agreement

- Definitions are provided in the help tip to the right of the question
- This selection will merge into certain Grants.gov forms

## Proposal Guidelines

- Attach the proposal guidelines (RFP, RFA, etc.) or provide the sponsor URL in this question

5.3 Provide the proposal guidelines (RFP, RFA, etc.) as an attachment (preferred) or URL below:

Attach proposal guidelines:

**+ Add a New Document** **+ Add Multiple Documents**

Detach	Version	Title	Category	Last Modified	Last Modified By	Checked Out By	View File
No Document(s) have been attached to this form.							

Or

Or provide URL here:

**Proposal Document Add:**

\*Select the document to upload: **Choose File** No file chosen

\*Version Number: .0 **Enter 1 as the version number**

Version Date:

Category: **--none--**

Description:

Comments:

**The category is optional but is helpful in summary views**

- none--
- Abstract
- Award
- Biosketch
- Budget
- Budget Narrative/Justification**
- Cover Page
- Current and Pending
- CV
- Full Proposal
- Miscellaneous
- Project Description
- Proposal Guidelines

**Save Document**

## Proposal that started as limited submission concept paper, letter of intent, or preliminary proposal

- If yes:
  - Indicate if the limited submission concept paper, letter of intent, or preliminary proposal was routed for internal approvals through EIPRS or VERAS
  - Upload documentation that provides authorization to submit a full proposal

## Tribal Relationship

- If your project will involve the use/study of tribal resources (treaty ceded territory), tribal land-base, tribal populations, or tribal government/departments, approval must be received from the Office of Tribal Relations **before** work may begin on a project.
  - Select the name of the tribe involved with your project
  - Upload approval documentation

It is recommended that approval is obtained at the proposal level to avoid delays upon the issuance of an award. They can be reached at [tribal\\_relations@uidaho.edu](mailto:tribal_relations@uidaho.edu)

Collaboration information may be found on their website: <https://www.uidaho.edu/president/direct-reports/tribal-relations/tribe-research-protocol>

## Sponsoring Entities

### Sponsor Information

- Indicate whether your sponsor is the prime sponsor or pass-through entity
  - Prime sponsor: the original source of the funds
  - Pass-through entity: an entity receiving funds from a prime sponsor and is 'passing-through' a portion of the scope of work and funding to U of I
    - U of I would be a subrecipient to the pass-through entity

We use the generic term 'sponsor' to indicate the entity that will have the contractual relationship with U of I. If you indicate that you are receiving funds from a pass-through entity we will also ask for information about the prime sponsor. This information is required because many of the prime sponsor's requirements will 'flow-down' to U of I as terms and conditions. Additionally, U of I has requirements for reporting based on the source of the funds received.

- There are additional guidelines for when U of I will request/receive funding from for-profit industry entities:
  - **Please** ensure that you have a well-defined and clear scope of work and timeline *before providing any estimates of costs*. This scope of work will define the sponsor's expectations of the work to be delivered and when it will be delivered.
  - It is important that you capture **all** costs of the project, including your time as PI and *the full industry indirect rate*. As a State entity the university is not allowed to subsidize private industry, and therefore all anticipated expenses should be included in your proposal budget.
  - When presenting costs to the sponsor we recommend using a 'fully-burdened' cost structure, providing less specific detail on the expenses being incurred and requesting the preference for a fixed-price contract. Fully burdened costs build the overhead into each type of expense.
  - The proposal must go through the standard process of university review and approvals before submission. OSP may require a more detailed budget than the one being presented to the sponsor.

### Sponsor

- Add your sponsor to the proposal by selecting **Add a New Sponsor to the Proposal:**

6.2 \* Sponsor

Add a single sponsor by clicking the "Add a Sponsor to the Proposal" button below. This will open a search window allowing you to choose from the sponsors currently in the system. Note that in general the sponsor names will not be acronyms due to the possibility of duplication.  
If your sponsor is not in the database please enter the information in the Sponsor search box by selecting "Add a New Sponsor to the Master List." Please do not add entities if you think it is likely that UI has worked with the sponsor in the past as it creates duplicate records that need to be managed.

**+ Add a New Sponsor to the Proposal** when this is selected, a pop-up window will appear and allow you to select your sponsor

Delete	View Details	Sponsor Name	Sponsor ID	Sponsor Type	Sponsor Type Description	UCOP Sponsor Code	Familiar Name	Legal Name
No Sponsor has been added to this Proposal								

Provide contact information if known:

Contact Name	Contact Email	Contact Phone
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Find a Sponsor: Search Options**

Sponsor Browse/Find: Sponsor Name:  Find Sponsor  
 Sponsor ID:

3 result(s) found...

Records/Page: 10 10 25 50 75

Select	Sponsor ID	Sponsor Name	Familiar Name	Legal Name
		Idaho <b>Bean</b> Commission		
		Ohio Soy <b>bean</b> Council		
		Ohio Soy <b>bean</b> Council		

Enter your sponsor name or partial name, click **Find Sponsor**, then click the book icon to select your sponsor

If your sponsor is not found, select **Add a New Sponsor to the Master List** and complete the information box with as much information possible

If your search returns a large result set, change the records/page here

If your sponsor is not available you will be able to add a new entity. Please be sure that you have done a thorough search before using this option to avoid duplication in the list:

**Add Sponsor to Master List Details:**

Sponsor Abrv:

\*Sponsor Name:

\*Sponsor Type: --none--  
 --none--  
 Federal  
 State of Idaho Government  
 Foundation or Other Non-Profit  
 Private Industry -- For Profit  
 Other State Government  
 University  
 Foreign  
 UI Internal

Street 1:

Street 2:

City:

County/Parish:

State:

Province:

Country:

Zip/Postal Code:

Provide the new sponsor name and sponsor type and as much other information as possible

Save Sponsor and add to Proposal

- Add your sponsor contact information in the fields below the sponsor selection, if known

#### Financial Conflict of Interest (FCOI) Reminder

- This is a reminder that certain sponsors (e.g., NSF or NIH) require disclosure of financial conflicts of interest (FCOIs) and additional training requirements. If your sponsor or prime sponsor is one of these entities you should complete a conflict of interest form separately in VERAS.

#### Responsible Conduct of Research (RCR) Reminder

- This is a reminder that it is the policy of the University of Idaho that responsible conduct of research (RCR) training will be provided in accordance with regulatory and granting agency requirements. No action is required.

#### Project Information

##### Project Type

- This question gathers data to help U of I prepare our annual NSF HERD survey which reports on R&D expenditure information at US colleges and universities. Each project is classified into an NSF defined project type. Definitions are provided in the help tip in the proposal application form.

### Discipline(s)

- When one of the research or equipment types is selected as a project type, you will be prompted to provide a discipline and field. This is a required element for our annual NSF HERD survey.

### On or Off Campus?

- Indicate where the proposed activity will take place. Definitions are provided to help you determine what is considered on or off campus locations. The Facilities & Administration (F&A) rate your project is entitled to use (absent any allowable sponsor restrictions on the rate) is determined by this question.

### Performance Site

- The default performance site is populated from the information in 'My Profile', 'My Account', 'Performance Sites'
- Add all sites where activity will be performed for your proposed project

### Proposed project period

7.5 Enter your proposed project period:  
Note that this information will have a validation check in the Budget section to ensure consistency.

These dates will flow into grants.gov forms and are used to validate the dates in the budget attached to the proposal

Start Date	End Date
05/01/2019	04/30/2021

### Subrecipients/Service Agreements/Consultants

- If external entities or other parties will receive a portion of the project funds, you will be prompted to select your subrecipient, vendor, or consultant and provide required documentation in this section
- The subrecipient search box is shown below:

**Find a Subrecipient: Search Options**

Subrecipient Browse/Find:

Subrecipient Name: Washington  Find Subrecipient

Familiar Name:

Organization Name:

Enter part of the **Subrecipient Name** or an acronym in the **Familiar Name** fields and select **Find Recipient**.

12 result(s) found...  1 - 10

Select	Subrecipient ID	Subrecipient Name	Familiar Name	Organization Name
		Idaho Washington Pea & Lentil		
		State of Washington - DNR		
		University of Washington		
		Washington Campus Compact		
		Washington Department of Fish & Wildlife		
		Washington Department of Natural Resources		
		Washington Dept of Transportation		
		Washington Grain Commission		

From the search results select the book icon next to your subrecipient.  
*Note: the process to add a new subrecipient is not available in this box and is described below.*

- If you do not find your subrecipient in the master list, select the **I NEED TO ADD A NEW SUBRECIPIENT** checkbox and provide as much information as possible:

Print Friendly Save Section Save and Continue to Next Section

Entire view of the Application

+ Add a New Subrecipient to the Proposal

Delete	Edit	View Details	Subrecipient Name	DUNS Number	Subrecipient Type	Familiar Name	Organization Name
No Subrecipient has been added to this Proposal							

I NEED TO ADD A NEW SUBRECIPIENT

Enter the new subrecipient information below as completely as possible. Be sure to include the subrecipient contact name, phone number, and email address, if known:

Entry 1

+ Click here to add another entry

**Subrecipient General Information**

Subrecipient name:

Street 1:

Street 2:

City:

State:

Country:

ZIP/Postal Code:

**Subrecipient Contact Information**

Contact Name:

Contact Phone/Email:

Will you be working with a subrecipient (subawardee/subcontractor) on this project?

Yes  No

Add a subrecipient by clicking the "Add a Subrecipient to the Project" button below. This will open a search window allowing you to choose from the subrecipients currently in the system. Note that in general names on this list will not be acronyms due to the possibility of duplication. If your subrecipient is not in the database please enter the information in the "I NEED TO ADD A NEW SUBRECIPIENT" area below. The amounts allocated to the subrecipient(s) will be added in the budget section later.

+ Add a New Subrecipient to the Proposal

Delete	Edit	View Details	Subrecipient Name	DUNS Number	Subrecipient Type	Familiar Name	Organization Name
No Subrecipient has been added to this Proposal							

I NEED TO ADD A NEW SUBRECIPIENT

Add as much information as you have in these fields, then save

- For each subrecipient/service agreement/consultant, you will be prompted to upload required documents, to include
  - Scope of work
  - Budget
  - Budget justification
  - Letter of commitment/U of I subrecipient commitment form
  - Other documents as required by the solicitation

*Note: Please include the subrecipient name/acronym in all document titles. The document names will be the same as the filenames you select from your local file directory.*

You can upload multiple documents at once:

**Proposal Document Add Multiple:**

Buttons: + Add New Record(s), Save Documents

Version	Version Date	Category	File path
1 .0		Budget	Choose File Test_Budget...mplate.xlsx
1 .0		Budget Narrative/Justification	Choose File Test_Budget...cation.docx
1 .0		Project Description	Choose File Test Scope of Work.docx
1 .0		Miscellaneous	Choose File Test_Letter_...itment.docx
		--none--	Choose File No file chosen

Required fields  
Version should always be 1

File names pull from your local file directory.  
Please be sure to include subrecipient/consultant/service agreement name or acronym in the filename

- If you will be entering into a service/consulting agreement you should be prepared to provide a service agreement/consultant quote. Some exceptions to this requirement are allowed; confer with your Sponsored Programs Administrator as needed.
- Note: some sort of price or cost analysis should be performed in connection with every procurement action, regardless of whether the organization is a vendor or a subrecipient. The form and degree of analysis are dependent on the particular subaward or purchase, and the pricing situation. Determination of price reasonableness through price or cost analysis is required even if the procurement is source-directed by the contracting officer of the sponsoring agency. More information is provided in the question's help tip on the application form.

#### U of I Budget and Budget Narrative/Justification

In order for VERAS to track proposed funding amounts at the award stage you must, at a minimum, create a **Basic Budget** in the **Add a Budget** question and upload your budget spreadsheet and budget justification. If this is your first time submitting a proposal in VERAS we recommend reviewing the guidelines which are included in the **Add a Budget** section that is after selection of budgeted personnel below.

If this is a Grants.gov submission, we recommend you create a **Detailed Budget** that will merge information into the Grants.gov forms, otherwise the SF424B will need to be created manually. The detailed budget format allows for escalation (esc) rates, separation of multiple funding periods, and dropdowns for current fringe benefit and F&A rates.

#### Project Personnel

First you will need to select all key/senior, additional internal, and external personnel who will be included in the budget and/or who need to provide forms such as a biosketch or current and pending forms (marked as 'include in forms').

- The order the personnel appear in this section will determine the order they appear in the budget and grants.gov forms

- Select **Add Personnel** to include personnel in your budget and other grants.gov forms:

9.3 \* Select key/senior and additional personnel who will be included in the budget and/or who need to provide forms such as a biosketch or current and pending forms. You may also add personnel directly from the detailed budget form. For additional guidance click the help link at right

No Budget Attached Save Edit Personnel Details + Add Personnel

**Senior/Key Personnel**

PI will auto fill based on initial PI selection

Add Biosketch and supporting documents here

Remove	Order	Name	Role	Personnel Type/ Organization	Include In	Attachments
	1	Jennifer Meekhof	Principal Investigator	Internal Regents of the University of Idaho	Forms	<b>Biosketch: Support:</b>

**Non-Key Personnel**

Add other Senior/Key Personnel, Non-Key Personnel, and Other Significant Contributors here

Remove	Order	Name	Role	Personnel Type/ Organization	Include In	Attachments
No Non-Key Personnel have been added to this Proposal						

**Other Significant Contributors**

Remove	Order	Name	Role	Personnel Type/ Organization	Include In	Attachments
No Other Significant Contributors have been added to this Proposal						

**+ Add External Personnel to the proposal** Add external personnel here

Delete	Edit	View Details	Name	Organization	Role	Phone Number	Email	Attachments
No External Personnel has been added to this Proposal								

University of Idaho

Account: [redacted]  
 Department: [redacted]  
 Path: Home > proposal mgmt. > application

Help My Profile Log out

Proposal Short Title: [redacted] Proposal Assistant: [redacted] **Add Research Personnel to Proposal** Back

Proposal Personnel Pool

Proposal Number: [redacted]  
 PI: [redacted]

Name	Role
Alistair Smith	Co-Principal Investigator
Erik Coats	Co-Principal Investigator
Kelly Bergeron	Department Administrator
Eric Everett	Administrative Assistant

The Proposal Personnel Pool is populated from your choices in section 2.0 Project Access and Assignments. Select each person who will be included in the budget or any grants.gov forms. Once the personnel are selected from the pool, they will appear in the Lists of Selected personnel below.

Additional personnel may be added to this pool from the User Search section to the left

To return to your application, select the Back button

List of Selected Senior/Key Personnel added to the Proposal

Delete	Edit	Name	Role	Category / Organization	Include In
		Jennifer Meekhof	Principal Investigator	Internal Regents of the University of Idaho	Forms

List of Selected Non-Key Personnel added to the Proposal

No Non-Key Personnel have been added to the form

List of Selected Other Significant Contributors added to the Proposal

No Other Significant Contributors have been added to the form

- External personnel are non-U of I collaborators who will be included in the budget (e.g. co-PIs from other institutions listed as subrecipients)

**Research Personnel Details:**

Please input details for the selected Personnel to be added to the Proposal.

Personnel: Alistair Smith

\*Role on Project: Co-Principal Investigator

\*Personnel Category: Senior/Key Personnel

Include In:  Forms

Attachments

Biosketch: Upload Attachment

Current/Pending Support: Upload Attachment

Save

Check this box to include the person in budget grants.gov forms

## Budget

- Selecting **Add a New Budget** will allow you to complete your budget entry in one of three ways:
  - **Detailed Budget:** For most Grants.gov submissions, you will want to complete your budget this way
  - **Modular Budget** This should be based on your detailed budget for internal purposes
  - **Basic Budget:** You must at least complete a Basic Budget and upload a spreadsheet for each proposal, even if the proposal is not being submitted through Grants.gov
- On the Budget Setup page, specify the details of your budget. This will allow the system to setup your budget appropriately:

My Workspaces  Proposal Short Title: Fresh Start  
 Proposal Number: 19069  
 PI: Meekhof, Jennifer K Proposal Assistant **Proposal Budget** Back

Save Changes To Budget Setup

**BUDGET STATUS:** Draft  
Version: 0.0

**Budget Setup**

1) Descriptive title for this Budget version:	Created from budget version: None
2) Select the budget format:	Detailed Budget
3) What is the budget action?	--none--
4) Auto calculate Personnel Totals ?	<input checked="" type="radio"/> Yes <input type="radio"/> No
5) Do you want to use an Academic Calendar ?	<input checked="" type="radio"/> Yes <input type="radio"/> No
6) Number of Budget Periods?	Period length: 1 year
7) Is there cost sharing?	<input type="radio"/> Yes <input checked="" type="radio"/> No
8) Apply a salary cap?	<input type="radio"/> Yes <input checked="" type="radio"/> No
9) Use actual fringe rates or projected fringe rates?	<input type="radio"/> Actual Fringe Rates <input checked="" type="radio"/> Projected Fringe Rates
10) Maximum allowed support request?	<input checked="" type="radio"/> Salary <input type="radio"/> Salary and Fringe <input type="radio"/> No
11) Select the F&A base code:	--none--
12) Select the F&A rate/ fixed amount:	--none--
13) Is this a K99/R00 proposal?	<input type="radio"/> Yes <input checked="" type="radio"/> No
14) Round totals to whole dollar?	<input type="radio"/> Yes <input checked="" type="radio"/> No
15) Budget Comments	
16) Budget Justification.	<b>Budget Justification Document</b> No budget justification document has been uploaded.
17) Attach additional budget related documents.	<b>Additional Budget Document(s)</b> No additional budget documents have been uploaded.

- The table below defines each of the items in the Budget Setup. You will not be able to start the actual budget until you define the Budget Setup and click the **Save Changes to Budget Setup** button.
- Required fields are noted with an \*

Descriptive title for this Budget Version*	A text field for the title of the budget.	
Select the budget format*	A drop down list with three options: Detailed Budget Detailed Modular Basic Budget	The option selected will change the level of detail you can input for the budget.
What is the budget action?*	A drop down list with multiple options: New Continuation (provide Continuation Period) Supplement (provide Supplement Period) Renewal (provide Renewal-beginning budget period (or BP)) No Cost Extension (Provide NCE Number)	Selecting an option identifies what type of budget is being created. Certain selections will prompt you for additional information.
Do you want to use an Academic Calendar?*	A Yes/No selection.	Specify Yes if your budget is based on an Academic Calendar Year. Specify No if your budget is based on a Fiscal or Other Calendar Year.
Number of Budget Periods?*	A Numeric value.	Enter a numeric value specifying the number of budget periods. You must also select from a drop down list what a period means for this budget. Available budget period lengths: 3 months 6 months 1 year Custom  After entering the number of periods, you will be prompted to enter the Start and End Date for each period. You only need to enter the Period 1 Start Date, and based on the Period Length, the rest of the dates will populate.  <i>The budget period Start and End Dates must match the dates entered in the Project Application for the Project Start Date and Project End Date. If these dates do not match, you will receive an error when attempting to save the Budget Setup page.</i>

Is there cost sharing?*	A Yes/No selection.	At this time we are not utilizing the cost share function in VERAS. Please mark this as <b>No</b> .
Apply a salary cap?*	A Yes/No selection.	Specify Yes to apply a salary cap. Specify No to turn off the salary cap in the budget.  Specifying Yes will prompt you to select the salary cap from a drop down list.
Use actual fringe rates or projected fringe rates?*	Selection of two options: Actual Fringe Rates Projected Fringe Rates	<b>Please specify Projected Fringe Rates.</b> This allows you to select from the consolidated fringe rates list as negotiated by the University.
Maximum allowed support request?	Selection of three options: Salary Salary and Fringe No	
Select the F&A base code:*	A drop down list with multiple options for Indirect Cost Base Codes.	Most commonly used are Modified Total Direct Cost and Total Direct Cost.
Select the F&A rate/fixed amount:	A drop down list with multiple options for Indirect Costs Rates.	Selecting an option will populate a Starting F&A Rate based on the University's negotiated rates.
Is this a K99/R00 proposal?	A Yes/No selection.	This is specific to NIH proposal types and will usually be set to No.
Round totals to whole dollar?*	A Yes/No selection.	Specifying Yes will round budget totals to a whole dollar. Specifying No will display totals without rounding.
Budget Comments	A text field.	You may add any necessary comments.
Budget Justification	A document upload feature. *Will not be available until the budget setup page is saved	Upload Budget Justification. This document can merge to the Grants.gov Opportunity Package.
Attach additional budget related documents	A document upload feature. *Will not be available until the budget setup page is saved	Upload any other supporting documentation for the budget.

- After entering the needed information for the Budget Setup page, click the **Save Changes to Budget Setup** button. This will create a Detailed Budget tab on the page.



#### Detailed Budget / Detailed Modular Budget

- When you choose the budget format options **Detailed Budget** or **Detailed Modular Budget** the input process is the same for both formats, as described in the sections below. The **Basic Budget** process is described [below](#).
- The application type controls the budget format you will choose when submitting to sponsor. If you are submitting to NIH, you must follow the NIH guidelines found here <https://grants.nih.gov/grants/how-to-apply-application-guide/format-and-write/develop-your-budget.htm>. Both **Detailed Budget** and **Detailed Modular Budget** will merge data into the Grants.gov opportunity's budget attachment, however, the Basic Budget will not. The **Detailed Modular Budget** will enforce a \$250,000 direct cost maximum per budget period and will also round direct costs up or down to the NIH specific regulations.

Budget Setup    Detailed Budget

1) Descriptive title for this Budget version: Detailed Modular  
Created from budget version: None

2) Select the budget format: Detailed Modular Budget  
Detailed Budget  
Detailed Modular Budget  
Basic Budget

3) What is the budget action?

4) Number of Budget Periods? Period length: 1 year

- The budget setup details will control the information that displays in the **Detailed Budget** page. Also note, that the tab name changed to the budget format selected, as shown in the screenshot below:

My Workspaces    Proposal Short Title: Fresh Start  
Proposal Number: 19069    Proposal Assistant    Proposal Budget  
PI: Meekhof, Jennifer K

Budget Setup    Modular Budget

1) Descriptive title for this Budget version: Fresh Start Modular Budget  
Created from budget version: None

2) Select the budget format: Modular Budget

- The top portion of the page contains buttons to control the page.
  - **Download** – At any point of populating the budget you can download the budget to an Excel document
  - **Refresh Salary** – At any point of populating the budget you can refresh salary rates to grab the latest information from the system. This will not be available until the feed between Banner and VERAS is completed later in the implementation process.
  - **Indirect Cost Details** – A popup window will open detailing the Indirect Cost information based on the F&A Base Code selected in Budget Setup. This page will not list any information until more information is added to the budget
  - **Clear Budget Period Data** – At any point of populating the budget you can clear out the page of all details and start fresh. Be sure that you want to restart all totals before clearing the data; you will not be able to restore any work once you click this button
  - **Calculate and Save Changes** - At any point of populating the budget you can save the changes to your budget and calculate budget totals

Budget Help    Download    Refresh Salary    Indirect Cost Details    Clear Budget Period Data    Calculate and Save Changes

Budget Setup    Budget Details

BP1	BP2	BP3	Summary
Start Date: 03/18/2014			
End Date: 03/17/2015			
All Periods	Total Direct Costs: \$0.00	Total Indirect: \$0.00	Total: \$0.00
Period 1	Total Direct Costs: \$0.00	Total Indirect: \$0.00	Total: \$0.00
Cost Sharing	Voluntary Committed: \$0.00	Mandatory: \$0.00	Total: \$0.00

- Also at the top of the page are tabs for each budget period specified in the Budget Setup as well as a Summary tab. You can switch between the budget periods by clicking on the appropriate tab. The Summary tab is a read only page that displays a summary of all funds requested for each budget category and the totals.
- Details specific to the budget period tab you are currently in display in the area below that tab. Read only display is the budget period Start Date, End Date and Salary Cap. To the right of this are the current budget totals. These totals will update as you input information into the budget and click the **Calculate and Save Changes** button.

- Below the Start and End Dates of the budget are the periods cost sections listed A. – J. on the screen. Each section represents a different portion of the budget, from Key Personnel labor costs to Direct and Indirect Costs. As you work in a section, you can expand that section on the page to show only that area on the screen.
  - For example, in section A. Senior Key Personnel you can click on the  icon to expand this section to a full page



**Budget Setup** | **Budget Details**

BP1 | BP2 | BP3 | **Summary**

Start Date: 03/18/2014 | End Date: 03/17/2015

All Periods: Total Direct Costs: \$0.00 | Total Indirect: \$0.00 | Total: \$0.00  
 Period 1: Total Direct Costs: \$0.00 | Total Indirect: \$0.00 | Total: \$0.00  
 Cost Sharing Voluntary Committed: \$0.00 | Mandatory: \$0.00 | Total: \$0.00

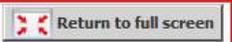
 **A. Senior Key Personnel**  Add To Be Determined Personnel

Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals	
<b>A. Senior Key Personnel</b>						Total Wages:	\$0.00	Total Fringe:	\$0.00	Total:	\$0.00

- This will cause the Senior Key Personnel section to open in a full screen view. From here you can add your records and manage this portion of the budget. When you are finished and are ready to return to the main budget screen, click the **Return to full screen** button.



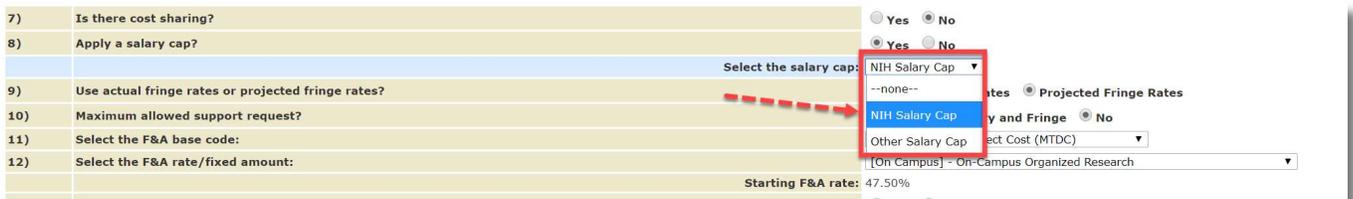
**A. Senior Key Personnel**  
 Period 1  
 Start Date: 03/18/2014 - End Date: 03/17/2015

  Add To Be Determined Personnel  Calculate and Save Changes

Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals	
<b>A. Senior Key Personnel</b>						Total Wages:	\$0.00	Total Fringe:	\$0.00	Total:	\$0.00

### Salary Cap

- If you are applying to NIH, use the NIH salary cap or if your sponsor specifies a different cap, choose 'Other' and provide the cap \$ amount.



7) Is there cost sharing?  Yes  No

8) Apply a salary cap?  Yes  No

9) Use actual fringe rates or projected fringe rates?  Actual Fringe Rates  Projected Fringe Rates

10) Maximum allowed support request?  Yes  No

11) Select the F&A base code: [On Campus] - On-Campus Organized Research

12) Select the F&A rate/ fixed amount: Starting F&A rate: 47.50%

Select the salary cap: NIH Salary Cap

Other Salary Cap

- Any personnel added to the budget with a recorded salary greater than the salary will have their Base Salary adjusted to the Salary Cap amount, as shown in the screenshot below. Note that the salary cap is based on an *annualized* salary, so academic-year employee salaries must be converted before evaluating as to whether they are over the cap:

Budget Setup		Budget Details						
BP1	BP2	BP3	Summary					
Start Date:	04/07/2014	Salary Cap: \$179,700.00		All Periods	Total Direct Costs: \$239,382.00 Total Indirect: \$181,185.00 Total: \$420,567.00			
End Date:	04/06/2015			Period 1	Total Direct Costs: \$239,382.00 Total Indirect: \$181,185.00 Total: \$420,567.00			
<b>A. Senior Key Personnel</b> <span style="float: right;"> <input type="button" value="+ Add Institutional Personnel"/> <input type="button" value="+ Add To Be Determined"/> </span>								
Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt
Susan Investigator Role: Principal Investigator	\$200,000.00	\$179,700.00	0.00%	0.00	--none-- 0.00%	\$0.00	--none-- 0.00%	\$0.00

### Fringe Rates

- In the Budget Setup tab, the system will default the fringe rates to 'Projected Fringe Rates'. U of I's consolidated fringe rates have been entered into the system, so please *do not* change this to 'Actual'.
- The example below lists two Senior Key Personnel records in the budget:

Budget Setup		Budget Details								
BP1	Summary									
Start Date:	04/01/2019	Salary Cap: \$179,700.00		All Periods	Total Direct Costs: \$44,276.00 Total Indirect: \$21,031.00 Total: \$65,307.00					
End Date:	03/31/2020			Period 1	Total Direct Costs: \$44,276.00 Total Indirect: \$21,031.00 Total: \$65,307.00					
<b>A. Senior Key Personnel</b> <span style="float: right;"> <input type="button" value="+ Add Institutional Personnel"/> <input type="button" value="+ Add To Be Determined Personnel"/> </span>										
Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate1	Month App. Esc Rate2	Req Salary	Fringe	Fringe Amt	Totals
Alistair Smith Role: Principal Investigator	\$0.00	\$175,000.00	10.00%	1.20	--none-- 0.00%	--none-- 0.00%	\$17,500.00	Faculty (academic year and summer) --none-- Faculty (academic year and summer) Staff (including Irregular Help) Temporary Help (non-benefit eligible) Student	\$4,638.00	\$22,138.00
Erik Coats Role: Co-Principal Investigator	\$0.00	\$175,000.00	10.00%	1.20	--none-- 0.00%	--none-- 0.00%	\$17,500.00	Faculty (academic year and summer) 26.50%	\$4,638.00	\$22,138.00
<b>A. Senior Key Personnel</b>						Total Wages:	\$35,000.00	Total Fringe:	\$9,276.00	\$44,276.00

### Maximum Allowed Support Request

- In the Budget Setup tab, you have the ability to indicate whether or not to apply a maximum dollar amount to budget salary line items. This will generally *not* be used unless the sponsor specifies this restriction in the RFP. You can indicate whether to apply the maximum amount to either salary's only or salary and fringe benefits, as shown in the screenshot below. This question in the Budget Setup tab defaults to the No selection, so if you want to utilize this in the budget, select either the Salary or the Salary and Fringe option.
- Once you select either the Salary option or the Salary and Fringe option, a field below will populate, allowing you to specify the maximum support amount.

**Budget Setup** | **Detailed Budget** **BUDGET STATUS: Draft**  
Version: 1.0

1) Descriptive title for this Budget version: New budget

Created from budget version: None

2) Select the budget format: Detailed Budget

3) What is the budget action? New

4) Do you want to use an Academic Calendar?  Yes  No

5) Number of Budget Periods? 3 Period length: 1 year

Period 1: Start Date 05/22/2014 End Date 05/21/2015  
 Period 2: Start Date 05/22/2015 End Date 05/21/2016  
 Period 3: Start Date 05/22/2016 End Date 05/21/2017

6) Is there cost sharing?  Yes  No

7) Apply a salary cap?  Yes  No

Select the salary cap: \$179,700 - FY2012 NIH Salary Cap 12/23/11-Forward

8) Use actual fringe rates or projected fringe rates?  Actual Fringe Rates  Projected Fringe Rates

9) Maximum allowed support request?  Salary  Salary and Fringe  No

Enter the maximum support request: \$ 150,000.00

10) Select the F&A base code: A - Modified Total Direct Cost (MTDC)

11) Select the F&A rate/fixed amount: [On Campus] - Sponsored Research

- Within the Budget Details tab, any personnel entered as Senior Key Personnel or Other Personnel will display the maximum amount. If you selected Salary, the cap will be applied to the requested salary in the **Req Salary** column, as shown in the screenshot below.

**Budget Setup** | **Budget Details**

BP1 | BP2 | BP3 | Summary

Start Date: 05/22/2014 All Periods Total Direct Costs: \$334,500.00 Total Indirect: \$107,096.00 Total: \$441,596.00  
 End Date: 05/21/2015 Period 1 Total Direct Costs: \$184,500.00 Total Indirect: \$107,096.00 Total: \$291,596.00  
 Salary Cap: \$179,700.00 Cost Sharing Voluntary Committed: \$0.00 Mandatory: \$0.00 Total: \$0.00

**A. Senior Key Personnel** + Add Institutional Personnel + Add To Be Determined Personnel

Name/Role	Apply Maximum	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate1	Month App. Esc Rate2	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals
Susan Investigator Role: Principal Investigator	<input checked="" type="checkbox"/>	\$0.00	\$175,000.00	100.00%	12.00	Jun 2014	--none--	\$150,000.00	Academic Personnel	\$34,500.00		\$184,500.00
To Be Determined	<input type="checkbox"/>	\$0.00	\$0.00	0.00%	0.00			\$0.00		\$0.00		\$0.00

- If you selected Salary and Fringe, the cap will be applied to the requested salary plus any fringe amounts applied and the cap will be displayed in the **Totals** column.

**Budget Setup** | **Budget Details**

BP1 | BP2 | BP3 | Summary

Start Date: 05/22/2014 All Periods Total Direct Costs: \$300,000.00 Total Indirect: \$87,070.00 Total: \$387,070.00  
 End Date: 05/21/2015 Period 1 Total Direct Costs: \$150,000.00 Total Indirect: \$87,070.00 Total: \$237,070.00  
 Salary Cap: \$179,700.00 Cost Sharing Voluntary Committed: \$0.00 Mandatory: \$0.00 Total: \$0.00

**A. Senior Key Personnel** + Add Institutional Personnel + Add To Be Determined Personnel

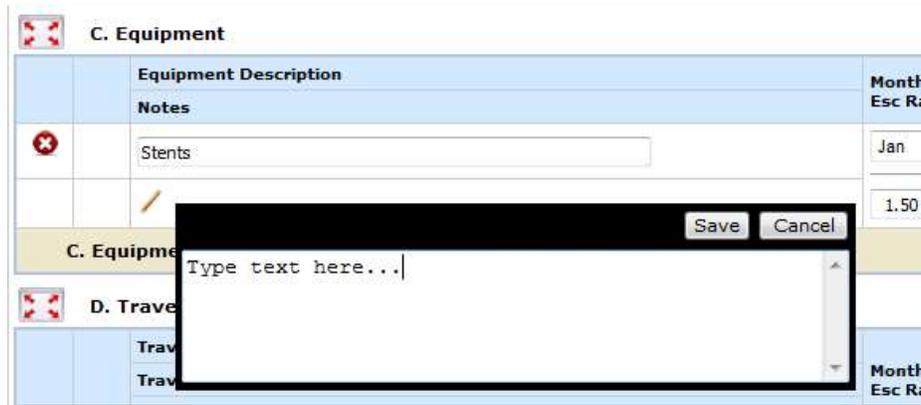
Name/Role	Apply Maximum	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate1	Month App. Esc Rate2	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals
Susan Investigator Role: Principal Investigator	<input checked="" type="checkbox"/>	\$0.00	\$175,000.00	100.00%	12.00	Jun 2014	--none--	\$121,951.00	Academic Personnel	\$28,049.00		\$150,000.00
To Be Determined Role: Co-Principal Investigator	<input type="checkbox"/>	\$0.00	\$0.00	0.00%	0.00			\$0.00		\$0.00		\$0.00

**Notes**

- Each line item in the budget has an area designated for any notes that need to be included. To access the note, click the  icon.



- A small pop up will open allowing you to type in your note. Click the **Save** button when you are finished. Click the **Cancel** button to leave the note without saving the text.



The note will be added to the budget line item, as shown in the screenshot below.



#### A. Senior Key Personnel and

#### B. Other Personnel

- Add any Senior Key Personnel and Other to the budget in these first two sections. You can add institutional personnel, or to be determined personnel. The functionality to add users to either Senior Key Personnel or Other Personnel is all done in the same area, following the steps below.
- To add existing VERAS users, click the **Add Institutional Personnel** button. A new window will open. From here you can choose to add personnel to the budget using two methods.
- *Note: If you create your budget from the Project Application, you will need to add your personnel using the Project Personnel button that will populate on this page in place of the **Add Institutional Personnel** button.*
  - **Project Personnel Pool** – This will allow you to add users listed from section 2.0 of the Project Application. The personnel are listed at the top portion of the page. Underneath this list are three groups where a user could be listed based on their specified budget role. Once you select a user to add to the budget, that user will populate in one of the three groups. Add any of these users to the budget by clicking the  icon next to the name.

Project Short Title: R01  
 Proposal Number: P0002226  
 PI: Investigator, Susan M.

### R01 - Project Budget Add Personnel

[Back](#)

Project Personnel Pool	
Name	Role
Susan Investigator	Principal Investigator
Additional Investigator	Co-Principal Investigator
Mary Coordinator	Clinical Research Associate
John Assistant	Research Assistant
Other Admin Personnel	Add'l Principal Investigator
Jan Administrator	Primary Research Administrator

- You can then select the Personnel Category – Senior Key Personnel, Non-Key Personnel, or Other Significant Contributor.

**Project Role Details:**

Please input details for the selected Personnel to be added to the budget.

Personnel: Susan Investigator

\*Role on Project: Principal Investigator

\*Personnel Category: Senior/Key Personnel

[Save](#)

- After selecting the appropriate Personnel Category, click the **Save** button located at the bottom right corner of the window. The user will populate in the appropriate category at the bottom of the page. From here you can remove a user from a category, Edit the record to move the user to a new category or change the order the user should display in the list.

List of Selected Personnel to be added to the Budget [Save Order](#)

**Senior/Key Personnel**

Delete	Edit	Order	Name	Role
		1	Susan Investigator	Principal Investigator

**Non-Key Personnel**

Delete	Edit	Order	Name	Role
No Other Personnel have been added to the budget				

**Other Significant Contributor**

Delete	Edit	Order	Name	Role
No Other Contributing Personnel have been added to the budget				

- You can continue to add personnel from the Project Application to the budget following the same steps.

List of Selected Personnel to be added to the Budget Save Order

Senior/Key Personnel				
Delete	Edit	Order	Name	Role
		1	Susan Investigator	Principal Investigator
		2	Other Admin Personnel	Add'l Principal Investigator
		3	Additional Investigator	Co-Investigator

Non-Key Personnel				
Delete	Edit	Order	Name	Role
		1	Mary Jane Coordinator	Clinical Research Associate
		2	John Assistant	Research Assistant
		3	Jan Administrator	Primary Research Administrator

- **User Search** – Users do not have to have a role on the Project to be listed on the budget. To add any other VERAS user to the budget, click the **User Search** button. This will bring up search criteria allowing you to search for a VERAS user to add. Enter your search criteria then click the **Find User/Search Directory** button.

Project Short Title: S2S  
 Proposal Number: P2393  
 PI: Investigator, Susan M.

**S2S - Project Budget Add Personnel** Back

Project Personnel Pool

**User Search**

Last Name:  First Name:

by Department: All Departments

Select	Name	Department	Email
Your search criteria returned 0 results.			

Find User/Search Directory

- When your user displays, click the icon in the **Select** column.

**S2S - Project Budget Add Personnel**

Last Name: user First Name:

by Department: All Departments

Select	Name	Department	Email
	User, George	Cardiology	
	User, Sarah	Cardiology	suser@imedris.com

- You can then specify the users **Role on Project** and **Personnel Category**. The Role on Project list will populate with your list of current Project roles.

Please input details for the selected user:

**Personnel:** Consultant  
Co-Investigator  
Programmer (research staff)  
Analyst  
Project Assistant  
Secretarial/Clerical  
Associate Research Services Coordinator

**\*Role on Project:** Other  
Nurse  
Other

**\*Personnel Category:** Other Professional

Save

- When you save the Role on Project and Personnel Category, the user will populate in the appropriate category at the bottom of the page. From here you can remove a user from a category, Edit the record to move the user to a new category or change the order the user should display in the list.

List of Selected Personnel to be added to the Budget Save Order

**Senior/Key Personnel**

Delete	Edit	Order	Name	Role
		1	Susan Investigator	Principal Investigator

**Non-Key Personnel**

Delete	Edit	Order	Name	Role
No Other Personnel have been added to the budget				

**Other Significant Contributor**

Delete	Edit	Order	Name	Role
		1	George User	Other Significant Contributor

- Remember that the category you place the user in will determine where in the budget they will be added. Any user placed in Senior/Key Personnel and Other Signification Contributors will populate in section A. of the budget. Non-Key Personnel will populate in section B. of the budget.
- Any user you add will then populate in the appropriate section on the budget.

**A. Senior Key Personnel** Add Institutional Personnel Add To Be Determined Personnel

	Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals
		Susan Investigator Role: Principal Investigator	\$120,000.00	\$ 120,000.00	0.00 %	0.00	--none-- 0.00 %	\$0.00 --none-- 0.00%	\$0.00		\$0.00
<b>A. Senior Key Personnel</b>							<b>Total Wages:</b>	\$0.00	<b>Total Fringe:</b>	\$0.00	<b>Total:</b> \$0.00

**B. Other Personnel**

	Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate	Req Salary	Fringe	Fringe Amt	Cost Sharing Totals	Totals
		Mary Coordinator Role: Clinical Research Associate	\$55,000.00	\$ 55,000.00	0.00 %	0.00	--none-- 0.00 %	\$0.00 --none-- 0.00%	\$0.00		\$0.00
<b>B. Other Personnel</b>							<b>Total Wages:</b>	\$0.00	<b>Total Fringe:</b>	\$0.00	<b>Total:</b> \$0.00
<b>All Personnel Totals</b>							<b>Total Wages:</b>	\$0.00	<b>Total Fringe:</b>	\$0.00	<b>Total:</b> \$0.00

- You can click the **Add To Be Determined Personnel** button within the Budget Details tab to put a placeholder role on the budget, without naming a user.
- A new window will open. From here you can choose to add a role to the budget. The available roles are listed at the top portion of the page. To add a role to the budget, click the  icon next to the name.

Project Short Title: R01  
 Proposal Number: P0002226  
 PI: Investigator, Susan M.

**R01 - Project Budget Add To Be Determined Personnel**

Personnel - To Be Determined	Project Roles
	 Co-Principal Investigator
	 Faculty Advisor/Mentor
	 Clinical Research Associate
	 Biostatistician
	 Data Manager
	 Technician
	 Research Assistant
	 Contact
	 Add'l Principal Investigator

- You can then specify the Personnel Category. Click the **Save** button to add the role to the budget.

**Project Role Details:**

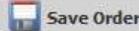
Please input details for the selected Personnel to be added to the budget.

\*Role on Project: Co-Principal Investigator

\*Personnel Category: Senior/Key Personnel



- When you save the Personnel Category, the Role will populate in the appropriate category at the bottom of the page. From here you can remove a role from a category, edit the record to move the user to a new category or change the order the user should display in the list.
- Note: The only role not available to add in To Be Determined Personnel is the Principal Investigator role. This user must be listed on the Project in section 2.0 of the Project Application.

List of Selected To Be Determined Personnel to be added to the Budget 

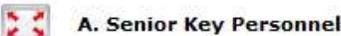
**Senior/Key Personnel**

Delete	Edit	Order	Name	Role
		1	To Be Determined	Co-Principal Investigator

**Non-Key Personnel**

Delete	Edit	Order	Name	Role
No Other Personnel have been added to the budget				

- When you return to Budget Details, the role added will populate in the appropriate category (either Senior Key Personnel or Other Personnel)



	Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate
	Susan Investigator Role: Principal Investigator	\$120,000.00	\$ 120,000.00	0.00 %	0.00	--none-- 0.00 %
	To Be Determined Role: Co-Principal Investigator	\$0.00	\$ 0.00	0.00 %	0.00	--none-- 0.00 %

- Once you have added users or to be determined users, information related to their salary will populate in the A. Senior Key Personnel or B. Other Personnel table.
- You can delete personnel directly from the section by clicking on the icon.
- Other columns in the Senior Key Personnel and Other Personnel sections are as follows:
  - **Name/Role** - The name and/or role of the personnel selected will display here.
  - **Original Salary** - Once the feed between Banner and VERAS is complete later in the implementation process the salary information associated to the user's account will pull in automatically; in the interim this may be added directly. If you added To Be Determined Personnel or a user with no salary information, this field will display \$0.00.
  - **Base Salary** - The base salary of the project personnel is entered in this field.
  - **Percent Effort** - The effort percentage the user will be committing to the Project can be entered here.
  - **Cal Mon** - The calculated total of calendar months.
  - **Month App. Esc (Escalation) Rate** - You can apply escalation rates to personnel salary in these columns. First, choose a month from the drop down list to indicate to the system when the escalation rate will take effect within the budget period. Then enter the Escalation Rate. If you need to capture more than one escalation per budget period, you can set the date of the new rate in the second **Month App. Esc Rate** column, as shown in the screenshot below. The information in the second column will remain grayed out and un-editable until information is entered in to the first column.

	Name/Role	Apply Maximum	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App. Esc Rate1	Month App. Esc Rate2	Req Salary	Frin
	Susan Investigator Role: Principal Investigator	<input checked="" type="checkbox"/>	\$0.00	\$ 175,000.00	100.00 %	12.00	--none-- 0.00 %	--none-- 0.00 %	\$121,951.00	Acc 23.0

- **Req Salary** - This area will populate with the personnel's total salary based on the Base Salary, Percent Effort, and Escalation Rate.

- **Fringe** - Use the drop down list to choose how to calculate the Fringe Rate. The items in this list will vary depending on the configurations in your system. When you select an item, the percentage field below it will populate with the associated Fringe Percentage.
  - **Fringe Amount** - This field will display the total fringe amount for the user based on the percentage selected in the previous column.
  - **Totals** - This is the total amount of expenses that will be used towards the budget totals. Fields that are included: salary, escalation, and fringe benefits.
- Enter information for all personnel in both sections. When all necessary amounts/totals have been entered, click the **Calculate and Save Changes** button.
  - The bottom of the Senior Key Personnel table will total all cost sharing information in a table (*note: we are not currently using the cost share function in the detailed budget section, this information will be collected later in the application, after the budget is attached*). Below that will be a summary of the totals for all personnel in the table.

Project Short Title: R01  
 Proposal Number: P0002226  
 PI: Investigator, Susan M.

**R01 - Project Budget** Back

C&G Budget Help Download Refresh Salary Indirect Cost Details Clear Budget Period Data Calculate and Save Changes

Budget Setup		Budget Details						
BP1	BP2	BP3	Summary					
Start Date: 04/07/2014		All Periods		Total Direct Costs: \$312,801.00		Total Indirect: \$181,185.00	Total: \$493,986.00	
End Date: 04/06/2015		Period 1		Total Direct Costs: \$312,801.00		Total Indirect: \$181,185.00	Total: \$493,986.00	

**A. Senior Key Personnel** Add Institutional Personnel Add To Be Determined Personnel

Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App-Esc Rate	Req Salary	Fringe	Fringe Amt	Totals		
Susan Investigator Role: Principal Investigator	\$120,000.00	\$ 120,000.00	45.00 %	5.40	Feb 3.00 %	\$54,284.00	Academic Personnel 35.25%	\$19,135.00	\$73,419.00		
To Be Determined Role: Co-Principal Investigator	\$0.00	\$ 85,000.00	15.00 %	1.80	--none-- 0.00 %	\$12,750.00	Academic Personnel 35.25%	\$4,494.00	\$17,244.00		
<b>A. Senior Key Personnel</b>						<b>Total Wages:</b>	\$67,034.00	<b>Total Fringe:</b>	\$23,629.00	<b>Total:</b>	\$90,663.00

- Other Personnel will also update with the totals. Below the Other Personnel totals, All Personnel Totals will display, as shown in the screenshot below:

**B. Other Personnel**

Name/Role	Original Salary	Base Salary	Percent Effort	Cal Mon.	Month App-Esc Rate	Req Salary	Fringe	Fringe Amt	Totals		
Mary Coordinator Role: Clinical Research Associate	\$55,000.00	\$ 55,000.00	50.00 %	6.00	Jun 3.00 %	\$28,201.00	Staff Personnel - Career 43.92%	\$12,386.00	\$40,587.00		
John Assistant Role: Research Assistant	\$98,600.00	\$ 98,600.00	80.00 %	9.60	May 3.00 %	\$81,091.00	Staff Personnel - Career 43.92%	\$35,615.00	\$116,706.00		
Jan Administrator Role: Primary Research Administrator	\$98,600.00	\$ 98,600.00	45.00 %	5.40	Oct 3.00 %	\$45,056.00	Staff Personnel - Career 43.92%	\$19,789.00	\$64,845.00		
<b>B. Other Personnel</b>						<b>Total Wages:</b>	\$154,348.00	<b>Total Fringe:</b>	\$67,790.00	<b>Total:</b>	\$222,138.00
<b>All Personnel Totals</b>						<b>Total Wages:</b>	\$221,382.00	<b>Total Fringe:</b>	\$91,419.00	<b>Total:</b>	\$312,801.00

### C. Equipment

Note: please limit to capital equipment items  $\geq$  \$5,000 as this section is excluded from the indirect cost base calculation when using modified total direct costs; equipment  $<$  \$5,000 in per unit cost should be listed under Materials and Supplies

- Equipment costs can be added to the budget in this section by selecting the **Add Equipment** button.

C. Equipment					+ Add Equipment
Equipment Description	Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Totals
C. Equipment					Total: \$0.00

- A record will be inserted in the category. Enter the detail for the equipment item, the escalation rate and month applicable if any, then the unit price and unit quantity.
- Add additional Equipment records as needed.
- When all necessary amounts/totals have been entered, click the **Calculate and Save Changes** button to add the Equipment Totals to the budget.

C. Equipment					+ Add Equipment	
Equipment Description	Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Cost Sharing Totals	Totals
Equipment #1		--none--	\$ 6,000.00	1.00		\$6,000.00
C. Equipment					Total: \$6,000.00	

#### D. Travel

- Travel costs and expense codes associated with a project can be added to the budget within this section.
- To add travel, click the **Add Travel** button.
- A record will be inserted in the category. Select the Travel Type (Domestic or Foreign travel costs) from the Travel Category drop down list and enter the Travel Description. You can also enter in the escalation rate and month applicable if any, then the unit price and unit quantity.
- Additional Travel records may be added as needed.
- When all necessary amounts/totals have been entered, click the **Calculate and Save Changes** button and the Travel Totals will be added to the budget.

D. Travel					+ Add Travel
Travel Category	Travel Description	Month App. Esc Rate	Unit Price	Unit Quantity	Totals
Domestic Travel Costs	On Site Training	--none--	\$ 1,500.00	6.00	\$9,000.00
Foreign Travel Costs	International Training Seminar	--none--	\$ 6,000.00	2.00	\$12,000.00

#### E. Participant Trainee Support Costs

Note: do not include Assistantship tuition and fees in this area - those will be included in the 'Other' section of the budget

- Participant Trainee Support Costs allows a user to associate any trainee costs to a project budget.
- To add trainee support costs, click the **Add Trainee Support Cost** button.
- A list of training items will populate in the table. You can enter the escalation rate and month applicable if any, then the unit price and unit quantity for each item. If you are not going to use a Trainee Category in your budget, you can click on the  to remove the category. When you do this, a button will populate at the top of the table called '**Add Trainee Support Cost** allowing you to add the category back to the budget, if necessary.

E. Participant Trainee Support Costs						
	Trainee Category Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Totals	
	Tuition/Fees	--none--	\$ 2,500.00	1.00	\$2,500.00	
		0.00 %				
	Health Insurance	--none--	\$ 3,000.00	12.00	\$36,000.00	
		0.00 %				
	Stipends	--none--	\$ 50.00	25.00	\$1,250.00	
		0.00 %				
	Travel	--none--	\$ 500.00	3.00	\$1,500.00	
		0.00 %				
	Subsistence	--none--	\$ 0.00	0.00	\$0.00	
		0.00 %				
	Other Enter Description:	--none--	\$ 0.00	0.00	\$0.00	
		0.00 %				
	Number of Participants/Trainees:		25			
<b>E. Participant Trainee Support Costs</b>					<b>Total:</b>	<b>\$41,250.00</b>

- At the bottom of the list of categories, you will be able to input the estimated number of trainees. When all necessary amounts/totals have been entered, click the **Calculate and Save Changes** button and the Participant Trainee Support Costs will be added to the budget.

#### F. Other Direct Costs

- Other Direct Costs can be entered in the appropriate categories listed in this portion of the budget. Each category has its own table where you can add the Description of the item, the Escalation Rate and Month Applicable, Unit Price, and Unit Quantity.
- The categories available in Other Direct Costs are Materials and Supplies (shown in the screenshot below), Publication Costs, Consultant Services, ADP/Computer Services, Subawards / Consortium / Contractual Costs, Equipment or Facility Rental / User Fees, Alterations and Renovations and Other Direct Costs. To add a direct cost to any of the categories, click the **Add Direct Cost** button above the appropriate table. Note that equipment with an individual item cost of <\$5000 should be included under Materials and Supplies.

F. Other Direct Costs						
1. Materials & Supplies <span style="float: right;">+ Add Materials &amp; Supplies</span>						
	Description Notes	Month App. Esc Rate	Unit Price	Unit Quantity	Totals	
	Office supplies	--none--	\$ 10.00	50.00	\$500.00	
		0.00 %				
<b>1. Materials &amp; Supplies</b>					<b>Total:</b>	<b>\$500.00</b>

#### ADP/Computer Services

- When you are adding records to the ADP/Computer Services section, you can specify the description of the record you are adding by selecting "Data Network Fee" or "Other" from the drop down list, as shown in the screenshot below. If you select "Other", you can type in the description.
- The remaining information can be entered similarly to the other sections in the budget.

4. ADP / Computer Services						+ Add ADP / Computer Services
Description	Month App. Esc Rate	Unit Price	Unit Quantity	Months	Totals	
Notes		Conglomerated Effort	Fee			
Other Enter Description: <input type="text"/>	--none-- 0.00 %	\$ 0.00	1.00		\$0.00	
4. ADP / Computer Services					Total: \$0.00	

### Subawards / Consortium / Contractual Costs

- If you indicated within the project application that you have subrecipients, you can enter in any subaward information in this section. When you add a record you will be able to select any subrecipient on the project from the drop down list.
- You can also specify both Direct and Indirect Costs in the columns provided.

5. Subawards / Consortium/Contractual Costs						+ Add Subawards / Consortium/Contractual Costs
Description	Direct Costs	Indirect Costs	Amt Allocated to IDC Base	Totals		
Notes						
American Red Cross -Northern Region Sister Campus? <input type="checkbox"/>	\$ 25,000.00	\$ 10,000.00	\$25,000.00	\$35,000.00		
5. Subawards / Consortium/Contractual Costs					Total: \$35,000.00	
Total Direct: \$25,000.00		Total Indirect: \$10,000.00		Total Alloc to IDC Base: \$25,000.00	Total: \$35,000.00	

### Equipment or Facility Rental/User Fees

- When you are adding records to the Equipment or Facility Rental/User Fees section, you can specify the description of the record you are adding by selecting "Equipment Rental", "Facility Rental/User Fees" or "Off Campus Rent" from the drop down list, as shown in the screenshot below. The remaining information can be entered similarly to the other sections in the budget

6. Equipment or Facility Rental/User Fees						+ Add Equipment or Facility Rental/User Fees
Description	Month App. Esc Rate	Unit Price	Unit Quantity	Totals		
Notes						
Equipment Rental	--none-- 0.00 %	\$ 500.00	1.00	\$500.00		
6. Equipment or Facility Rental/User Fees					Total: \$500.00	

### Other Direct Costs

- The University of Idaho will only use 'Tuition/Fee Remission' or 'Other' from the drop down list.

8. Other Direct Costs					
Description	Month App. Esc Rate	Unit Price	Unit Quantity	Other Multiplier/ Months	Totals
Notes					
--none-- --none-- Inpatient Care Costs Outpatient Care Costs Tuition/Fee Remission Other	--none-- 0.00 %	\$ 0.00	1.00	1	\$0.00
8. Other Direct Costs					Total: \$0.00

UI will only use this option here

### Tuition Fee Remission/Other

- Once you choose one of the items from the drop down list, the section will be renamed to your selection. In the example below, Tuition/Fee Remission was selected and the section was renamed from 'Other Direct Costs' to 'Tuition/Fee Remission'.
- The remaining information can be entered similarly to the other sections in the budget.

8. Tuition/Fee Remission						+ Add Tuition/Fee Remission
Description	Month App. Esc Rate	Unit Price	Unit Quantity	Other Multiplier/ Months	Totals	
Tuition/Fee Remission	--none--	\$ 0.00	1.00	1	\$0.00	
	0.00%					
<b>8. Tuition/Fee Remission</b>					<b>Total:</b>	<b>\$0.00</b>

- When all necessary amounts/totals have been entered into the Direct Cost categories, click the **Calculate and Save Changes** button and the Direct Cost items will be added to the budget.

### G. Direct Costs Total

- Underneath Section F are the section totals, as shown in the screenshot below. Also shown here are the total Direct Costs in Section G. This displays the totals for all the previous sections (A-F).

Budget Setup		Budget Details				
BP1	BP2	BP3	Summary			
Start Date: 04/07/2014		All Periods		Total Direct Costs: \$476,490.00	Total Indirect: \$260,789.00	Total: \$737,279.00
End Date: 04/06/2015		Period 1		Total Direct Costs: \$476,490.00	Total Indirect: \$260,789.00	Total: \$737,279.00
10. Tuition/Fee Remission				Total:		\$750.00
<b>F. Section Total</b>				Total:		<b>\$50,300.00</b>
<b>G. Direct Costs</b>				Total Direct Costs ( A thru F )		<b>\$476,490.00</b>

### H. Indirect Costs

- This section shows the associated indirect costs with a project budget. You may add a description in the note area, but any changes needed to the Indirect Costs Category must be made in the Budget Setup area of the budget.

H. Indirect Costs						
Indirect Cost Category	Description	Start Date	End Date	Indirect Cost Rate	Indirect Cost Base	Totals
	A - Modified Total Direct Cost (MTDC)	04/07/2014	07/01/2014	57.00 %	\$106,081.82	\$60,467.00

- Click the **Calculate and Save Changes** button after adding Description and Notes if needed.
- The Totals displayed in this section are based on items added in the Other Categories. You can obtain detail about what is being calculated in the Totals for Indirect Costs by clicking the **Indirect Cost Details** button at the top of the Budget page.



- This will open a window displaying what is included in indirect cost calculations. Depending on which selected in Budget Setup, you may or may not be able to modify what is included in the Indirect Cost calculation.

Selected Items to be used for period BP1 with the F&A base code: A - Modified Total Direct Cost (MTDC) Close

A&B Personnel					
Include Salary	Include Fringe		Salary Totals	Fringe Totals	Totals
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Personnel from A& B	\$257,689.00	\$103,992.00	\$361,681.00

D. Travel			
Include	Travel Category	Travel Description	Totals
<input checked="" type="checkbox"/>	Domestic Travel Costs	On Site Training	\$9,000.00
<input checked="" type="checkbox"/>	Foreign Travel Costs	International Training Seminar	\$12,000.00

E. Participant Trainee Support Costs		
Include	Trainee Category	Totals
<input checked="" type="checkbox"/>	Health Insurance	\$36,000.00

- Indirect cost items are added to the budget based on the F&A Base Code and F&A Rate selected in the Budget Setup tab. The items selected here calculate the Indirect Costs for the budget.

7)	Use actual fringe rates or projected fringe rates?	<input checked="" type="radio"/> Actual Fringe Rates <input type="radio"/> Projected Fringe Rates
8)	Select the F&A base code:	A - Modified Total Direct Cost (MTDC)
9)	Select the F&A rate/fixed amount:	[On Campus] - Sponsored Research
	Starting F&A rate:	57.00%
10)	Round totals to whole dollar?	<input checked="" type="radio"/> Yes <input type="radio"/> No

- If you choose an F&A Rate from the drop down list, it may have adjusted rates, depending on the University's negotiated F&A rate agreement. If that is the case, there will be more than one line item in this section in the budget effective when the F&A rate is scheduled to change.

H. Indirect Costs

Indirect Cost Category	Description	Start Date	End Date	Indirect Cost Rate	Indirect Cost Base	Totals
	A - Modified Total Direct Cost (MTDC)	04/07/2014	07/01/2014	57.00 %	\$106,081.82	\$60,467.00
	A - Modified Total Direct Cost (MTDC)	07/01/2014	04/06/2015	58.00 %	\$345,382.68	\$200,322.00
<b>Total Indirect Costs:</b>						<b>\$260,789.00</b>

### I. Total Direct and Indirect Costs

- This area of the budget will display the calculated total for both Direct Costs and Indirect Costs. If you have not saved the budget, this number may not be accurate.

### I. Total Direct and Indirect Costs

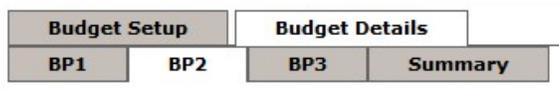
Total Direct and Indirect Institutional Costs (G + H) \$737,279.00

### J. Fees

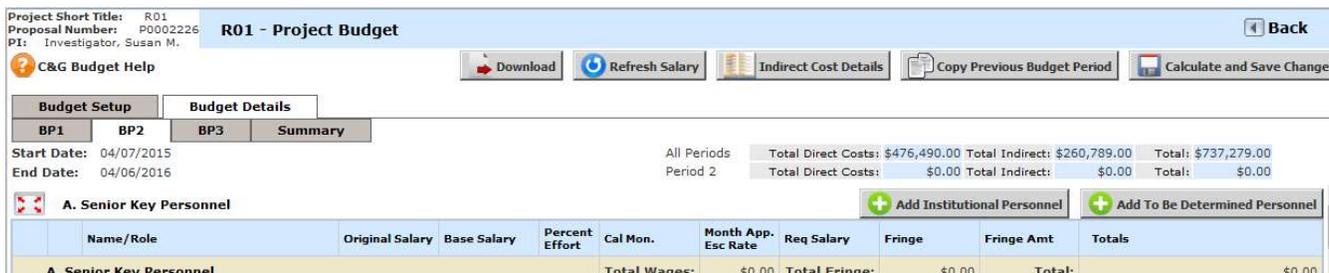
DO NOT USE

### Budget Periods

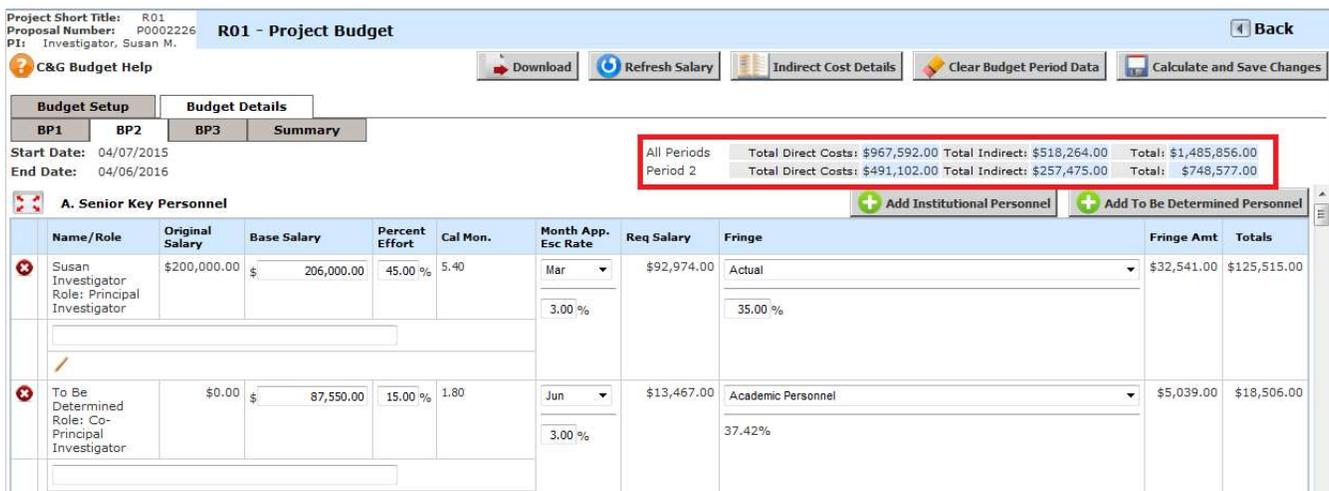
- After all the necessary fields for the 1<sup>st</sup> budget period (**BP1**) have been entered and your budget has multiple periods, move on to the remainder of the budget periods. To do so, click on the tab that corresponds with the budget period to be setup. If the selected Budget Action was Renewal the budget period data will copy from the prior budget period, allowing you modifications as necessary.



- Follow the above process for each budget period or, if the totals in each section will be similar to the previous budget period, copy the data to the next period.
- At the top of the page, a **Copy Previous Budget Period** button will display in all budget periods that are not Budget Period 1.



- When you choose to copy from the previous budget period, the system will copy over the information you added in Budget Period 1 and apply it to the next budget period.
- Note: If you copy data in a budget period, it only looks at the previous budget period. For example, if you copy data in Budget Period 3, data from Budget Period 2 will copy over, not Budget Period 1.
- The screenshot below shows an example of Budget Period 2 after data has been copied. Note that the **Copy Previous Budget Period** is no longer displayed.
- The totals for each section have copied over, including any Escalation applied to the sections. For example, in section 1. Senior Key Personnel, the Principal Investigator had a 3% rate increase so the Base Salary is recorded as \$206,000, where in Budget Period 1 it was recorded as \$200,000.
- You will see the totals for the current budget period and all periods combined at the top of the page.



- After copying data from the previous budget period, you may make any necessary changes then click the **Calculate and Save Changes** button and proceed to any other budget period, following the same method.

### Summary

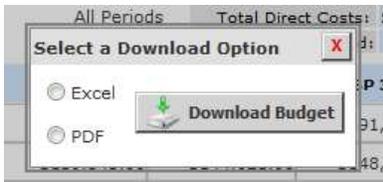
- The Summary tab will display the totals for each category for each budget period.

Budget Setup		Budget Details			Summary		Select the Summary View: Detailed Summary	
BP1	BP2	BP3						
Start Date: 04/07/2014		All Periods		Total Direct Costs: \$1,473,864.00	Total Indirect: \$929,971.00	Total: \$2,403,835.00		
End Date: 04/06/2017		Cost Sharing		Voluntary Committed: \$0.00	Mandatory: \$0.00	Total: \$0.00		
Funds Requested		BP 1	BP 2	BP 3	SubTotal	Total		
<b>A. &amp; B. Personnel</b>		\$361,681.00	\$376,259.00	\$391,395.00		\$1,129,335.00		
A. Senior Key Personnel		\$139,543.00	\$144,021.00	\$148,642.00	\$432,206.00			
B. Other Personnel		\$222,138.00	\$232,238.00	\$242,753.00	\$697,129.00			
Total Number of Other Personnel: 9								
<b>C. Equipment</b>		\$2,259.00	\$2,293.00	\$2,327.00		\$6,879.00		
<b>D. Travel</b>		\$21,000.00	\$21,000.00	\$21,000.00		\$63,000.00		
Domestic Travel Costs		\$9,000.00	\$9,000.00	\$9,000.00	\$27,000.00			
Foreign Travel Costs		\$12,000.00	\$12,000.00	\$12,000.00	\$36,000.00			
<b>E. Participant Trainee Support Costs</b>		\$41,250.00	\$41,250.00	\$41,250.00		\$123,750.00		
Tuition and Fees		\$2,500.00	\$2,500.00	\$2,500.00	\$7,500.00			

- You can switch the view of the summary tab between Detailed Summary and PHS 938 Modular Budget by selecting the view in the drop down list at the top of the page.
- When you switch to the PHS 398 Modular Budget view, the system will alert you if any of your budget period Direct Costs exceeds the NIH allowance of \$250,000 per period.

Summary		Select the Summary View: PHS 398 Modular Budget			All Periods		Total Direct Costs: \$671,533.00		Total Indirect: \$256,648.00		Total: \$928,181.00	
<b>WARNING: One or more budget periods has exceeded the maximum allowable of \$250,000 per period. To be eligible to submit a PHS 398 Modular Budget to NIH, you will need to reduce direct costs.</b>												
		BP 1	BP 2	BP 3			Cumulative					
Start Date:		04/21/2014	04/21/2015	04/21/2016			04/21/2014					
End Date:		04/20/2015	04/20/2016	04/20/2017			04/20/2017					
<b>A. Direct Costs</b>												
Direct Costs less Consortium F&A		\$369,324.00	\$150,000.00	\$150,000.00			\$669,324.00					
Consortium F&A		\$0.00	\$0.00	\$0.00			\$0.00					
Total Direct Costs		\$369,324.00	\$150,000.00	\$150,000.00			\$669,324.00					

- You can also download the budget to an Excel spreadsheet or PDF by clicking the **Download** button. This will cause a small popup within the browser asking which format to download the file. Make your selection and click the **Download Budget** button.



- You may be prompted by your Internet browser to Open or Save the file, depending on your Internet settings.

### Basic Budget

- When you choose the Budget Format "Basic Budget" you must answer the same questions in the Budget Setup as described in the [Add a New Budget](#) section above. Once you populate the information in this tab and click the **Save Changes to Budget Setup** button, a new tab will populate called **Basic Budget**.

Project Short Title: R01  
 Proposal Number: P0002241  
 PI: Investigator, Susan M.

**R01 - Project Budget** Back

Save Changes To Budget Setup

Budget Setup **Basic Budget**

**BUDGET STATUS: Draft**  
Version: 0.0

1) Descriptive title for this Budget version:	Basic Budget
2) Select the budget format:	Basic Budget
3) What is the budget action?	New

- The Basic Budget tab contains all the budget periods in a series of columns, with the last column on the page containing the Summary of all periods combined. Each row in the Basic Budget is described below.

C&G Budget Help Download Budget Calculate and Save Changes

Budget Setup **Basic Budget**

	BP1	BP2	BP3	Summary
Start Date	04/18/2014	04/18/2015	04/18/2016	04/18/2014
End Date	04/17/2015	04/17/2016	04/17/2017	04/17/2017
PI Effort Committed (%)	0.00%	0.00%	0.00%	0.00%
PI Salary Request (%)	0.00%	0.00%	0.00%	0.00%
Direct	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Indirect	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total</b>	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

- Start Date** – The budget period starting date will populate in this column. This information comes from the Budget Setup tab.
- End Date** – The budget period ending date will populate in this column. This information comes from the Budget Setup tab.
- PI Effort Committed (%)** – Enter the PI Effort for each budget period. As you enter information into each budget period, the table will update the total in the Summary column, as shown in the screenshot below.
- PI Salary Request (%)** – Enter the PI Salary Request for each budget period. As you enter information into each budget period, the table will update the total in the Summary column, as shown in the screenshot below.

Budget Setup **Basic Budget**

	BP1	BP2	BP3	Summary
Start Date	04/18/2014	04/18/2015	04/18/2016	04/18/2014
End Date	04/17/2015	04/17/2016	04/17/2017	04/17/2017
PI Effort Committed (%)	45.00%	55.00%	60.00%	53.33%
PI Salary Request (%)	100.00%	100.00%	100.00%	100.00%

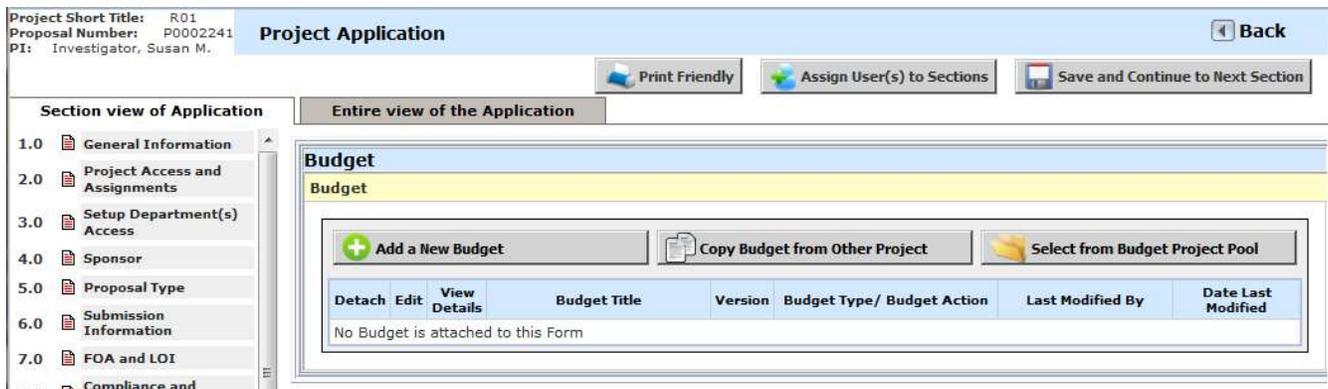
- Direct** – Enter the total Direct Cost for each budget period. As you enter information into each budget period, the table will update the total in the Summary column, as shown in the screenshot below
- Indirect** – Enter the total Indirect Cost for each budget period. As you enter information into each budget period, the table will update the total in the Summary column, as shown in the screenshot below

- **Total** – Information in this column for each budget period will update with a total of the Direct Cost plus Indirect Cost. The Summary column will total each amount from all budget periods.

Direct	\$	250,000.00	\$	255,000.00	\$	260,000.00	\$	765,000.00
Indirect	\$	25,000.00	\$	27,500.00	\$	30,000.00	\$	82,500.00
<b>Total</b>	\$	275,000.00	\$	282,500.00	\$	290,000.00	\$	847,500.00

### Submitting a Budget

- A Budget may be associated to a Project Submission form and submitted to the Office of Sponsored Programs for review. Within the form, a Project Budget data value will allow the association of an existing budget to the form. In this example, the Project Application is being used. Shown below is a section within the Application that will allow the budget to be attached.
- If a budget has not been created for the project, the **Select from Budget Project Pool** button will not display.



- Clicking the **Add a New Budget** button will navigate you to the Budget Setup page where you can create a new budget following the same steps provided above in the [Add a New Budget](#) section.
- When clicked, the **Select from Budget Project Pool** button causes a window to appear listing all budgets that currently exist within the Project. Budgets that are not currently attached to a submission form will display the **Attach** and **Delete** buttons and will display a “Draft” status. When a budget is associated to a Project form, the Attach and Delete buttons will no longer be available for that budget and the **Status** will update to “Attached”.

Attach	Delete	View Details	Open/Edit	Budget Title	Version	Budget Type / Budget Action	Status	Last Modified By	Date Last Modified	Create Revision
				R01 Budget	1.0	Detailed Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:15:10 AM PDT	
				New Budget	2.0	Detailed Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:15:10 AM PDT	
				Detailed Modular	3.0	Detailed Modular Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:20:34 AM PDT	
				Basic Budget	4.0	Basic Budget / New	Draft	Investigator, Susan M.	04/21/2014 4:10:53 PM PDT	

- Additional budget information can be expanded by clicking the **View Details** icon. This will display a summary of the totals for the specific budget.

**Select Budget:**

Attach	Delete	View Details	Open/Edit	Budget Title	Version	Budget Type / Budget Action	Status	Last Modified By	Date Last Modified	Create Revision
				R01 Budget	1.0	Detailed Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:15:10 AM PDT	
				New Budget	2.0	Detailed Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:15:10 AM PDT	
				Detailed Modular	3.0	Detailed Modular Budget / New	Draft	Investigator, Susan M.	04/18/2014 11:20:34 AM PDT	

<b>Start Date:</b>	04/21/2014
<b>End Date:</b>	04/20/2017
<b>Categories</b>	<b>SubTotal</b> <b>Total</b>
<b>A. &amp; B. Personnel</b>	
	\$366,551.00
A. Senior Key Personnel	\$289,364.00
B. Other Personnel	\$77,187.00
Total Number of Other Personnel: 3	
<b>C. Equipment</b>	\$304,982.00
<b>D. Travel</b>	\$0.00
<b>E. Participant Trainee Support Costs</b>	\$0.00
Number of Participants/Trainees: 0	

- Click the icon in the **Attach** column next to the appropriate budget to attach it to the form.
- If Personnel associated to the budget are not included in the Project form, you will receive that information when you associate the budget to the form. You can choose to add the user to the form by selecting the checkbox next to the Forms option in the Include **In** column, however it is not required. Before you can continue, you must click the **Save Personnel to Project** button at the bottom of the window.

**Add Personnel from Budget to Project Research Personnel:**

Name	Role	Personnel Category	Include In	Attachments
Mary Coordinator	Clinical Research Associate	Non-Key Personnel	<input checked="" type="checkbox"/> Budget <input type="checkbox"/> Forms	

- The budget will display in the table below the Budget data value. You can detach the budget by clicking on the icon in the **Detach** column. This will remove the budget from the form, allowing you to add another budget in its place.

**Budget**

Budget

Add a New Budget     
 Copy Budget from Other Project     
 Select from Budget Project Pool

Detach	Edit	View Details	Budget Title	Version	Budget Type/ Budget Action	Last Modified By	Date Last Modified
			Detailed Modular	3.0	Detailed Modular Budget / New	Investigator, Susan M.	04/18/2014 11:20:34 AM PDT

- If you specified to add any personnel from the budget to the form, the Project Personnel data value will update with that information, as shown in the screenshot below.

[Print Friendly](#)    [Assign User\(s\) to Sections](#)    [Save and Continue to Next Section](#)

**Section view of Application**

- 1.0 General Information
- 2.0 Project Access and Assignments
- 3.0 Setup Department(s) Access
- 4.0 Sponsor
- 5.0 Proposal Type
- 6.0 Submission Information
- 7.0 FOA and LOI
- 8.0 Compliance and Questions
- 9.0 CHR Studies
- 10.0 On Campus Performance Site
- 11.0 Performance Site(s)
- 12.0 Subrecipients
- 13.0 Budget
- 14.0 Standalone forms and project personnel

**Entire view of the Application**

Budget Attached: Version 3.0, Detailed Modular 
[Save](#)    [Edit Personnel Details](#)    [Add Personnel](#)

**Senior/Key Personnel**

Remove	Order	Name	Role	Personnel Type/ Organization	Include In	Attachments
	1	Susan Investigator	Principal Investigator	Internal Institution Affiliation I	Budget Forms	Biosketch: Support:
✖	2	Additional Investigator	Co-Principal Investigator	Internal	Forms	Biosketch: Support:

**Non-Key Personnel**

Remove	Order	Name	Role	Personnel Type/ Organization	Include In	Attachments
✖	1	Jan Administrator	Primary Research Administrator	Internal Institution Affiliation I	Forms	
✖	2	Mary Coordinator	Clinical Research Associate	Internal	Budget Forms	

- When the Project Application form is submitted, the budget information will display within the Signoff Page, as shown in the screenshot below.

[Back](#)

[Save Signoff](#)

**Project Title:** Copy of Clinical Trials to Test the Effectiveness of Treatment, Preventive, and Services Interventions (R01)

**Submission Reference Number:** 002271

---

**Proposal Information**

<b>P#:</b> P0002241	<b>Mentor:</b>
<b>PI/Fellow Name:</b> Susan M. Investigator	
<b>Type of Agreement:</b> Grant	
<b>Purpose:</b> Research	
<b>Administering Department(s):</b> null - Cardiology	<b>Department(s) providing space/resources:</b> null - Cardiology
<b>Performance Site:</b> 123, , Redlands - grants1001/Test, CA: California, 92374, USA: UNITED STATES	

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**Institutional Review Due Date:** 03/28/2014

**Budget Information for the Entire Project Period**

<b>Start Date:</b>	04/21/2014
<b>End Date:</b>	04/20/2017
<b>Direct Cost:</b>	\$669,324.00
<b>Indirect Cost:</b>	\$256,648.00
<b>TOTAL:</b>	\$925,972.00
<b>PI Effort Committed:</b>	45.00%
<b>PI Salary Requested:</b>	45.00%
<b>Mandatory Cost Sharing:</b>	\$0.00
<b>Voluntary Cost Sharing:</b>	\$0.00

- The budget will display as an attachment to the form, as shown in the Submission Components view in the screenshot below.

Item(s)

**Print**   **Submission Component Name - Version**

**Sponsor Form(s)**  
 G.g AT07 and NIH Ext-UAT Test FOA (T32) - PA-B1-T32 - (Version 1.0)

**Internal Form(s)**  
 **Proposal Form - (Version 1.0)** (Parent of the submission package)

**Internal Form Attachments**  
**Category : Funding Opportunity Announcement**  
 **Pending Opportunity Letter - (Version 1.0)**

**Internal Budget(s)**  
 **Detailed Modular - New - (Version 3.0)**

### Cost Share

- Complete the cost share question and table, and attach any required documentation
- *Note: Voluntary cost share is not generally allowed. Additional guidance is provided in the application form section*

Print Friendly   Save Section   Save and Continue to Next Section

Entire view of the Application

**9.5 Cost Share**

Are you planning to offer cost share with this proposal submission?

No  
 Yes - Only as required by sponsor  
 Yes - As required plus voluntary committed cost share  
 Yes - Voluntary committed cost share only

What is the minimum dollar amount of cost share required by the sponsor?  
*Note: Keep in mind that any expense item used as cost share must be an allowable expense under the terms of the sponsor guidelines and occur within the project period.*  
 19200

**Cost Share by category:**  
 In the comments boxes please include enough detail for the departmental approver to ensure availability and allowability of the use of these expenses as cost share.

Category	Amount	Details	Departmental Approver
Salary/Temp Help	15000	Summer salary	Heather Nelson
Fringe	4200		Heather Nelson
Travel			
Other Expense			
Equipment			
Indirect Cost (F&A)			
Waived Overhead			
Tuition			
3rd Party		If more than one third party is providing cost share, enter the combined amount in the total column and provide details and amounts for each third party below:	
<b>Total Cost Share:</b>	<b>19200.00</b>		

If Third Party was included above, please upload a letter of support for each entity involved

Detach	Version	Title	Category	Last Modified	Last Modified By	Checked Out By	View File
No Document(s) have been attached to this form.							

### Cost Accounting Standards (CAS) Exemption

- Indicate whether or not you will request a Cost Accounting Standards (CAS) exemption for project costs that would normally be included as a part of F&A.
- If you will request a CAS exemption, complete the remaining questions, provide the cost details and supporting documentation, and provide the justification of special circumstances to directly charge the expenses to your project.
- The OSP Cost Accounting unit will review the request and make a determination of allowability.

### Program Income

- Indicate the amount of program income that will be generated from project activities, if any. This amount will flow into the SF424 if your proposal is a grants.gov submission.

### Multiple Indexes

- If you have multiple investigators and want each investigator/department to have distinct budgets, provide the preferred index title, which PI/co-PI will be responsible for the index, and the responsible unit.

9.8 \* Will your funding need to be split into multiple indexes (i.e. separate funding 'pots' by PI or department) if awarded?

Yes  No

For each additional index needed, provide the preferred title, PI/co-PI who will have authority for spending, and responsible unit below:  
*A list of department codes is provided in the help link to the right. We plan to incorporate this into a dropdown list in a future enhancement.*

Entry 1
Entry 2

Click here to add another entry
 Click here to Delete this entry

Select this to request additional indexes.

Complete this panel for each index requested. Each index request will have a separate tab

Preferred index title	<input type="text"/>
PI/co-PI with spending authority	<input type="text"/>
Responsible unit (3 digit department code)	<input type="text"/>

### Grants.gov Submissions - Select or download opportunity packet

This question will only appear if you selected 'Grants.gov' as the OSP submission method question in section 5.0, [Proposal Guidelines & Basic Submission Information](#).

- This is where you will select or download and attach a grants.gov opportunity packet to your proposal.

10.0 Grants.gov Submissions - Select or download opportunity packet

10.1 Click on the button below to search for or select a Grants.gov opportunity.

Click here to attach a grant opportunity.

No grant opportunity has been associated.

Attach Application Package

+ Add a New Grant Opportunity

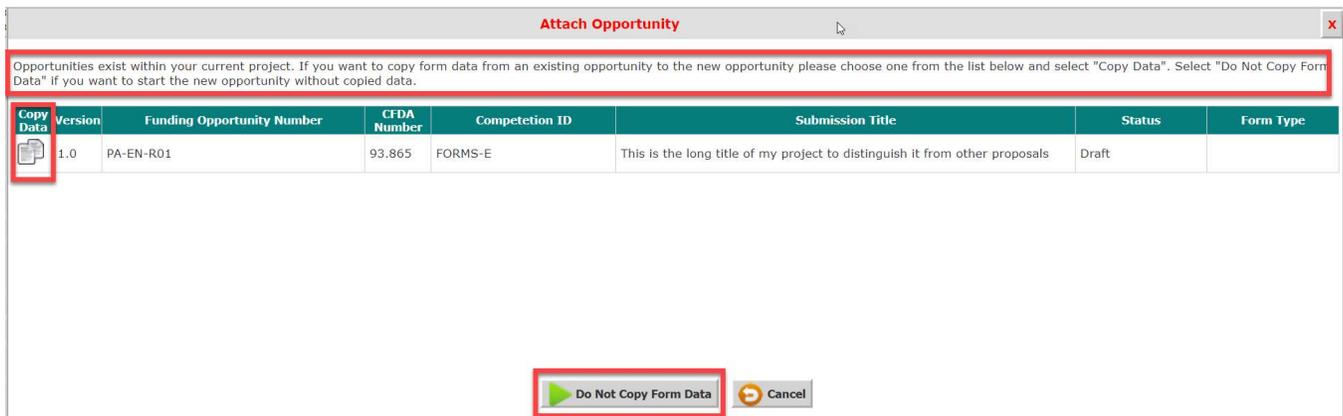
Attach	Delete	View Details	Change to FOA	Edit/View	Version	Opportunity Title	Opportunity Number	Package ID	CFDA	Competition ID	Opening Date	Closing Date	Sponsor Due Date	Tracking Number	Agency Tracking Number	Instructions
					1.0	G.g. Training and NIH Ext-UAT FOA (R01-Clinical Trial Not Allowed)	PA-EN-R01	PKG00037257	93.865	FORMS-E	08/16/2017	08/16/2020				

If your application package appears here, select from this list, otherwise select **Add a New Grant Opportunity**

- To Add a New Grant Opportunity:

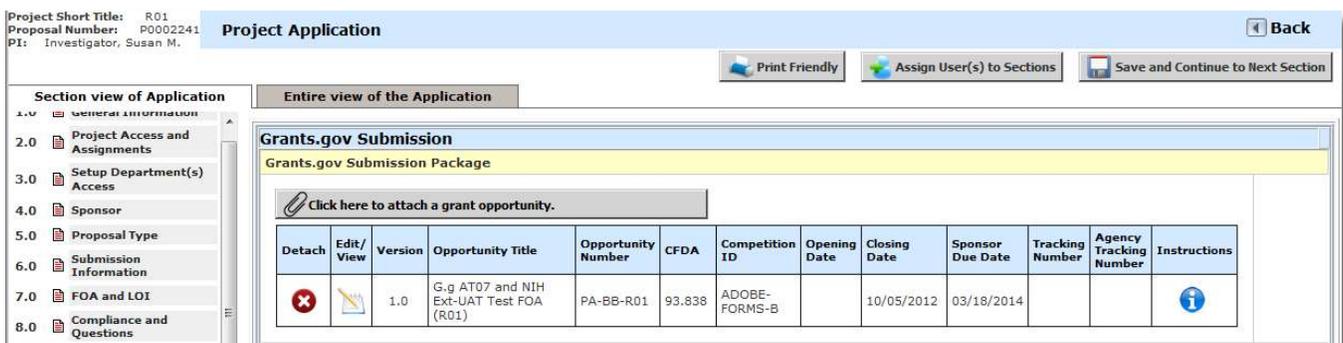


- After the selection of the opportunity, attach it to your proposal:



### Merging the Budget to Sponsor Forms and Grants.gov Opportunities

- The Detailed Budget and the Detailed Modular budgets created in VERAS will merge data into the following Grants.gov forms:
  - RR\_Budget (V1.1 , V1.3)
  - RR\_Budget10 (V1.1, V1.3, V2.0)
  - RR\_FedNonFedBudget V1.1
  - RR\_`FedNonFedBudget10 V1.1
- Other Budget Forms associated to Grant Opportunities will not merge data, but will allow you to enter data before submitting to the sponsor.
- The screenshot below displays an opportunity associated to a Project Application. Clicking on the icon in the **Edit/View** column will open the contents of the package, including any budget attachments, if available.



- When you open the opportunity, the contents will be listed in a new page. Some opportunities will contain a budget attachment, as shown in the screenshot below. If you have already completed the

proposal budget and associated it to the proposal application, and the budget form used on the opportunity is one of the RR forms listed above, information from the budget can merge into this attachment. Click the icon in the **Open/Add** column.

Project Short Title: R01  
 Proposal Number: P0002241  
 PI: Investigator, Susan M.

**Sponsor Forms** Back

Opportunity Number : PA-BB-R01  
 NIH Activity Code : NIH funding opportunity information currently unavailable. Until restored, eProposal is unable to trigger Activity Code specific Errors/Warnings.

Refresh Package Print Package

Application Filing Name / Submission Title :

[Subscribe to Grants.gov notices based on funding opportunity num](#)  
 Validation Type: NIH

Open/Add	Delete	Form Name	Required/Optional	Errors / Warnings	Complete?
		PHS 398 Checklist V1.3	Required		
		PHS 398 Cover Page Supplement V1.4	Required		
		PHS 398 Research Plan V1.3	Required		
		Project/Performance Site Location(s) V1.3	Required		
		Research And Related Senior/Key Person Profile (Expanded) V1.2	Required		
		Research And Related Other Project Information V1.2	Required		
		Application For Federal Assistance SF 424 (R&R) V1.2	Required		
		PHS 398 Modular Budget V1.1	Optional		
		PHS Cover Letter V1.2	Optional		

- Information entered into the proposal budget will populate into the budget attachment form, as shown in the screenshot below, from all entered budget periods, with a summary tab included.
- You can switch between the budget periods by selecting the corresponding tab at the top of the page.

Project Short Title: R01  
 Proposal Number: P2544  
 PI: Investigator, Susan M.

Grants.gov Application Package

PHS 398 Modular Budget V1.1

Budget Period 1 | Budget Period 2 | Budget Period 3 | **Summary**

Reload Form Data | Save Form | Delete Period | Add Period

**PHS 398 Modular Budget**  
**Budget Period : 1**

Start Date: 05/29/2014 | End Date: 05/28/2015

**A. Direct Costs**

	Funds Requested (\$)
* Direct Cost less Consortium F&A	150,000
Consortium F&A	0.00
<b>* Total Direct Costs</b>	<b>150000.00</b>

**B. Indirect Costs**

Indirect Cost Type	Indirect Cost Rate (%)	Indirect Cost Base (\$)	* Funds Requested (\$)
1. Modified Total Direct Cost (MTDC)	57.00	13696.04	7807.00
2. Modified Total Direct Cost (MTDC)	58.00	133737.79	77568.00
3.			
4.			

Cognizant Agency (Agency Name, POC Name and Phone Number): DHHS, Joe Smith, 909-798-9100

Indirect Cost Rate Agreement Date: 03/25/2012 | Total Indirect Costs: 85375.00

**C. Total Direct and Indirect Costs (A + B)** | Funds Requested (\$): 235375.00

### Modifying the Budget

- You can add, edit, and remove data from these budget forms, however any changes you make to this budget form will not reflect in the budget you created within the proposal. It is recommended that you make changes to the budget within the proposal, and then update this budget form by clicking the **Reload Form Data** at the top of the page. This will ensure both budgets have the current information.

### Errors/Warnings

- If a tab within the budget form has errors, it will be highlighted in yellow, as the summary tab does in the screenshot above. When you navigate to the tab containing errors, at the top of the budget form, a list of those errors will display.
- Any errors within the form will populate at the top of the tab currently open. You can expand the errors by clicking on the icon next to the warning text. This will expand a list of warnings/errors. You can click the link for any warning to be taken directly to the field within the budget form to correct the issue. When you are finished, be sure to click the **Save Form** button at the top of the page.

Project Short Title: R01  
 Proposal Number: P2544  
 PI: Investigator, Susan M.

Grants.gov Application Package

PHS 398 Modular Budget V1.1

Budget Period 1 | Budget Period 2 | Budget Period 3 | **Summary**

Mark Complete | Reload Form Data | Save Form

**1 Warnings**

**1. Warning - [NIH] PersonnelJustification** : In most cases, a Personnel Justification attachment should be included if a Modular Budget is being submitted.

### Document Attachments

- Also within the budget form you can upload any necessary attachments. The attachment fields will look similar to the ones shown in the screenshot below.
- You can upload a document by clicking on the **Add Attachment** button next to the appropriate field.

Project Short Title: R01  
 Proposal Number: P2544  
 PI: Investigator, Susan M.

**Grants.gov Application Package**

PHS 398 Modular Budget V1.1

Mark Complete | Reload Form Data | Save Form

Budget Period 1 | Budget Period 2 | Budget Period 3 | Summary

1 Warnings

### Cumulative Budget Information

1. Total Costs, Entire Project Period

* Section A, Total Direct Cost less Consortium F&A for Entire Project Period	\$ 400000.00
Section A, Total Consortium F&A for Entire Project Period	\$
* Section A, Total Direct Costs for Entire Project Period	\$ 400000.00
* Section B, Total Indirect Costs for Entire Project Period	\$ 267189.00
* Section C, Total Direct and Indirect Costs (A+B) for Entire Project Period	\$ 667189.00

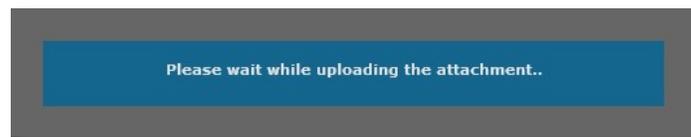
2. Budget Justifications

Personnel Justification	<input type="text"/>	Add Attachment	View Attachment	Delete Attachment
Consortium Justification	<input type="text"/>	Add Attachment	View Attachment	Delete Attachment
Additional Narrative Justification	<input type="text"/>	Add Attachment	View Attachment	Delete Attachment

- A small popup window will open, allowing you to **Choose File** from your local file directory. Once you locate your file, you will return to this window. Click the **Save Selected File** button to continue uploading the file or you choose **Cancel** to return to the budget form.



- Your file may take several moments to upload to the system, depending on the file size. The budget form screen will grey out while the upload is taking place and you will see the following message on your screen.



- Once the upload is complete, the page will return to normal and the attachment field will list the uploaded file. If the file you uploaded was a Word document or an .rtf, the system will convert the attachment to a .PDF, as required by Grants.gov submissions.
- You may review your uploaded document by clicking on the **View Attachment** button. This will open the document in a separate window.
- You can remove your attachment from the budget form by clicking on the **Delete Attachment** button.

2. Budget Justifications

Personnel Justification	personal_justification.pdf	Add Attachment	View Attachment	Delete Attachment
Consortium Justification	<input type="text"/>	Add Attachment	View Attachment	Delete Attachment
Additional Narrative Justification	<input type="text"/>	Add Attachment	View Attachment	Delete Attachment

## Summary Tab / Mark Complete

- After any changes to the budget have been completed, click the **Mark Complete** button at the top of the page so that the system will flag this form as ready to be submitted with the rest of the package to the sponsor. You are still able to make modifications to the budget form, if necessary. You will need to mark the budget form as complete again after making any changes.

Project Short Title: R01  
 Proposal Number: P2544  
 PI: Investigator, Susan M.

**Grants.gov Application Package** Back

**PHS 398 Modular Budget V1.1** Mark Complete Reload Form Data Save Form

Budget Period 1 | Budget Period 2 | Budget Period 3 | **Summary**

### Cumulative Budget Information

1. Total Costs, Entire Project Period

* Section A, Total Direct Cost less Consortium F&A for Entire Project Period	\$ 400000.00
Section A, Total Consortium F&A for Entire Project Period	\$
* Section A, Total Direct Costs for Entire Project Period	\$ 400000.00
* Section B, Total Indirect Costs for Entire Project Period	\$ 267189.00
* Section C, Total Direct and Indirect Costs (A+B) for Entire Project Period	\$ 667189.00

2. Budget Justifications

Personnel Justification	personal_justification.pdf	Add Attachment	View Attachment	Delete Attachment
Consortium Justification		Add Attachment	View Attachment	Delete Attachment
Additional Narrative Justification		Add Attachment	View Attachment	Delete Attachment

- When you return to the list of items within the Grant Opportunity, the budget form will be flagged as complete, as shown in the image below.

Open/Add	Delete	Form Name	Required/Optional	Errors / Warnings	Complete?
+		PHS 398 Cover Page Supplement V1.4	Required		
+		PHS 398 Checklist V1.3	Required		
+		Research And Related Senior/Key Person Profile (Expanded) V1.2	Required		
+		Project/Performance Site Location(s) V1.4	Required		
+		PHS 398 Research Plan V1.3	Required		
+		Research & Related Budget V1.1	Optional		
+		R&R Subaward Budget Attachment(s) Form V1.2 <span>Attach Budget</span>	Optional		
+		PHS Cover Letter V1.2	Optional		
	✖	PHS 398 Modular Budget V1.1	Optional	✔	✔

- After you have completed each required and desired optional forms, select the back button twice to return to your application, or click on **application** in the file path at the top of your screen:

University of Idaho Account: Jennifer K Meekhof  
 Path: Home > proposal mgmt. > **application** > proposal budget setup > grant app

My Workspaces Proposal Assistant **Grants.gov Application** Help My Profile Log out

Application For Federal Assistance SF424 (R&R) V2.0 Reload Form Data Save Form

Return to your application by selecting application from the file path or the Back button several times

Back

## Non Grants.gov Proposal Documents

This question will only appear if you selected 'No' to the Grants.gov opportunity/submission question in section 5.0, Proposal Guidelines & Basic Submission Information.

- Upload all required proposal documents for submission to sponsor:
  - Project narrative
  - Scope of work
  - Other forms as required by the solicitation

**10.0 Non Grants.gov Proposal Documents**

**10.1 Upload all required proposal documents (e.g., project narrative, scope of work, other sponsor forms) here:**

Attach as many additional documents as needed.

Select or Revise Existing    + Add a New Document    ++ Add Multiple Documents

Detach	Version	Title	Category	Last Modified	Last Modified By	Checked Out By	View File
No Document(s) have been attached to this form.							

**Research Compliance**

- If you will be working with human subjects, animals, biohazards, or radioactive materials, you will be prompted to provide compliance protocol information and associate any relevant submitted protocol(s) in VERAS.
  - If you will work with human subjects, your work may fall under the oversight of the Institutional Review Board (IRB). Contact [irb@uidaho.edu](mailto:irb@uidaho.edu) with questions.
  - If you will work with vertebrate animals, your work may fall under the oversight of the Institutional Animal Care and Use Committee (IACUC). Contact [iacuc@uidaho.edu](mailto:iacuc@uidaho.edu) with questions.
  - If you will work with biohazards (recombinant or synthetic nucleic acid molecules, potentially infectious or known infectious agents, select agents or toxins, animal tissues or cells, and bodily remains or embryonic stem cells of an aborted or unborn infant), your work will need to be reviewed by the Institutional Biosafety Committee (IBC). Contact [ored-ora@uidaho.edu](mailto:ored-ora@uidaho.edu) with questions.
  - If you will work with radiation or radioactive materials, your work will need to be reviewed by Environmental Health and Safety’s Radiation Safety program. Contact [safety@uidaho.edu](mailto:safety@uidaho.edu) with questions.

**Find A Study: Search Options**

IRB Number:     Principal Investigator: Meekhof, Jennifer K

Study Status: All    Study Keywords:

Expiration Start Date: --none--    Expiration End Date: --none--

1703 result(s) found...    1 - 10

To Search: add filters then select Find Studies.

Add Study	Study Status	IRB Number	Study Alias Study Title	Principal Investigator	Expiration Date
+	Draft		Physics Lab Refinement	Jacob Richard Turner	
+	Draft		Copy of Physics Lab Refinement		
+	Draft		Effect of Total Motion Release ...	Hyung-Pil Jun	
+	Pending	IACUC-2017-30	Copy of Effect of Total Motion Release Exercise on Internal Rotation of Shoulder and Trunk Rotation Overhead Throwing Athletes	Richard J. Norell	
+	Draft		Measuring electrical resistance of dairy cattle		
+	Draft		Felons in Moscow	Kristin Haltinner	

Find your protocol in the search results, then select Add Study

**Other**

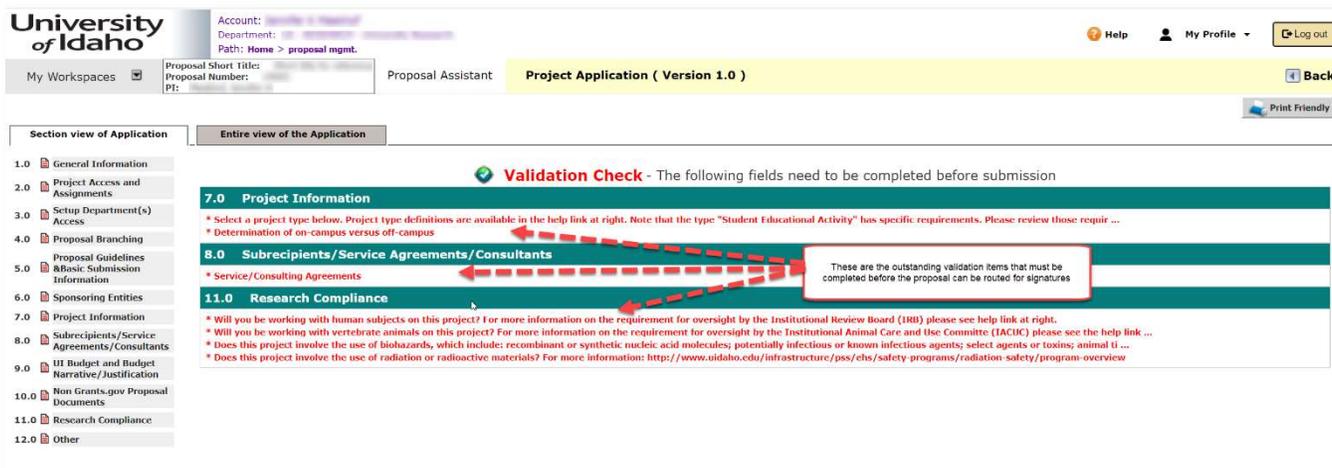
- This section addresses other potential requirements related to intellectual property, publication restrictions, ownership of new inventions, export controls, unmanned aerial systems, capital equipment purchase, or space renovation/construction.
- Based upon the answers you provide in this section, you will be prompted to provide additional information or will be given additional instruction. Please be sure to contact the appropriate department(s) as indicated:
  - The Office of Technology Transfer: <https://www.uidaho.edu/research/faculty/license-your-technology>
  - Export Controls: [export-ored@uidaho.edu](mailto:export-ored@uidaho.edu)
  - U of I Purchasing Services: [purchasing@uidaho.edu](mailto:purchasing@uidaho.edu)
  - U of I Facilities: [facilities@uidaho.edu](mailto:facilities@uidaho.edu)
  - Office of Research and Faculty Development: [rfdteam@uidaho.edu](mailto:rfdteam@uidaho.edu)

**Note: if you are not ready to begin the validation check and signature routing process, please select [Save Section](#) in order to save the section and continue working in your application without the need to provide answers to all required questions at this time.**

### Validation Check

When you have completed your application and are ready for OSP to complete their review, the validation process will begin.

- All incomplete required questions will display in red text:



- To correct the errors, click on each element listed in red to complete, then select [Validation Check/Save Form](#)

### Signoff and Submission

Once the application is complete and OSP has authorized the proposal to move forward for signoff and approvals you will receive a 'task' email from veras.imedris.net instructing you in this regard. Please make this email address a 'trusted sender' to ensure that you receive these notices.

When you click on the task link in the email or open your home screen in VERAS you will see this signing task in the tasks menu, which will take you to the approval screen.

- A summary of the proposal, budget, and agency information is now displayed (see screenshot on next page).
  - This is also where submission forms may be combined into a single pdf document.
    - Check the **Include in PDF** Packet boxes to combine documents into a single pdf.
    - To create the single pdf, select the **Printable Version** icon and rearrange the documents in the order you would like them to appear.
  - At the bottom of this section is where you will approve your application by clicking on the **Save Signoff** button
    - Once you have done this your proposal will be sent to OSP for final review and routing.
    - The status of your application will now show 'Pending – Proposal Submitted to OSP'.

My Workspaces Proposal Assistant **Submission Routing Signoff** Back Save Signoff

Proposal Title: Test - emulation of Michele's account for budget section issues  
Submission Reference Number: D03640

**Proposal Information**

PI/Fellow Name: Jennifer K Meekhof  
Type of Agreement: Grant  
Purpose: Research - Development  
Administering Department(s): 676 - University Research  
Performance Site: 875 Perimeter Dr., Moscow, ID: Idaho, 83844, USA: UNITED STATES

**Budget Information for the Entire Project Period**

Start Date: 07/01/2019  
End Date: 06/30/2020  
Direct Cost: \$500,000.00  
Indirect Cost: \$251,500.00  
TOTAL: \$751,500.00  
PI Effort Committed: 5.00%  
PI Salary Requested: 5.00%  
Mandatory Cost Sharing: \$0.00  
Voluntary Cost Sharing: \$0.00

**Agency Information**

Sponsor (Agency): Avista Corporation  
Grants.gov Opportunity #:   
Grants.gov Opportunity Title:

**Submission Form(s)**

Internal Form(s):  
 Proposal Form - (Version 1.0)  
Internal Budget(s):  
 Michele's basic budget - New - (Version 1.0)  
Internal Form Attachments:  
 Test Scope of Work - (Version 1.0)  
 RFP\_test\_document - (Version 1.0)

Include in PDF Packet: Submission Component Name - Version

Jennifer K Meekhof as Principal Investigator do you Approve or Deny this submission?  
 Approve  Deny

Comments:

View Other Comments:

Erik Robert Coats	Co-Investigator	Comments:
Louise-Marie Dandurand	Co-Investigator	Comments:
Alistair Smith	Co-Principal Investigator	Comments:
Paul Rowley	Co-Principal Investigator	Comments:

**Annotations:**

- Red dashed arrow: Create a PDF copy of your proposal packet by selecting the documents to include, then select Printable Version. (Points to 'Printable Version' button)
- Red dashed arrow: Review the summary information above for accuracy, then Approve by marking the radio button, add any comments, and select Save Signoff. (Points to 'Approve' radio button, 'Comments' field, and 'Save Signoff' button)

## View My Proposals

All proposals for which you are listed as a PI or senior personnel are displayed in this menu box (also accessed by scrolling to the bottom of this workspace).

- There are three tabs available along the top of this section: All, Draft, and Pre-award. Each tab will provide a summary of your proposals that are in that particular status.



- From this table you can open a proposal for editing, view the proposal history, hide the proposal from this table, copy the proposal, or delete a proposal that is in draft status.
  - Once a proposal is in 'Submitted to Sponsor' status it will be locked and no further editing is allowed.
- There are currently no 'Forms' available. Look for this function in a future enhancement.

**All Proposals** Recently Used Project Status Search for Proposal/Award Number, Title Search Settings

5 result(s) found... 1 - 5

Click to open	Proposal Status	Review Board	Proposal Number Award Number	Sponsor Due Grant Office Due	Proposal Title Short Title	Principal Investigator	Actions
	Draft	Pre-award	19063 <Not Assigned>	03/29/2019 <Not Assigned>	Test - emulation of Michele's account for budget section issues Michele's greyed out budget	Meekhof, Jennifer K	<input type="button" value="History"/> <input type="button" value="Forms"/> <input type="button" value="Hide"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>
	Draft	<Not Assigned>	19074	04/01/2019	Last draft of proposal application before Go-Live!		<input type="button" value="History"/> <input type="button" value="Forms"/> <input type="button" value="Hide"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>

**Tip:** To open History click on the small '+' symbol (Points to the '+' icon in the History button)

- Select the gear icon in the upper right corner of this panel to close the panel, show previously hidden proposals, or change the number of results displayed per page.



## Start a Proposal Submission Form

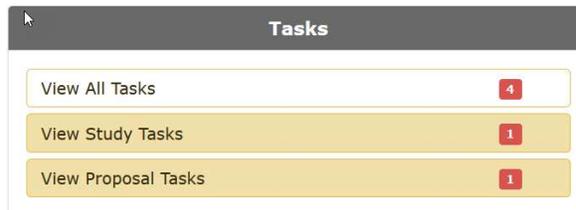
There are currently no 'Forms' available. Look for this function in a future enhancement

## Incomplete Forms

This is a summary of all forms you have started and have not yet submitted

## Tasks

This menu box shows the number outstanding tasks assigned to you by type. Selecting one of these options will move you to the task panel below the 'Proposal Assistant' panel where a summary of tasks assigned to you for completion is displayed. (You can also use the scroll bar to get to the task panel.)



Within the 'All Tasks' panel bar are two options:

- 'Outstanding' will filter and show only your uncompleted tasks
- 'Completed' will filter and show all tasks previously completed by you.

To close the entire panel or change the number of results in this table, select the gear icon and choose the desired option from the drop-down list.

An additional filter is available below the gear icon that allows you to filter results by task type.



The tabs below the 'All Tasks' bar provide further options to view your tasks by type. The task panel will be renamed to the current selection (see the screenshots below).

## All Tasks

This provides a summary of *all* VERAS tasks assigned to you, including tasks from the IRB, IACUC, and Conflict of Interest modules.

Open each task to view and complete.

Click to open	Task Type	Received	Description
	Annual Conflict of Interest Renewal Notice	02/06/2019 03:30:12 AM PST	Annual Disclosure of Significant Financial Interest Needed - 10 day notice for Karla Bradley Eitel with the renewal date of 02/16/2019
	Annual Conflict of Interest Renewal Notice	01/17/2019 03:30:16 AM PST	Annual Disclosure of Significant Financial Interest Needed - 30 day notice for Karla Bradley Eitel with the renewal date of 02/16/2019
	Project Waiting Submission	01/16/2019 01:38:06 PM PST	Proposal Form is waiting to be submitted
	Continuing Review Due	10/01/2018 03:30:02 AM PDT	Pending Expiration Notice for 15-849 60-day Notice of Continuing Review with the expiration date of 11/30/2018

## Study Tasks

This provides a summary of all compliance related tasks assigned to you. More details are provided in this view compared to 'All Tasks.'

Open each task to view and complete.

Click to open	Task Type	Received	Study Status	Study Title	Principal Investigator	Review Board	RB Number	RB Expiration
	Continuing Review Due	10/01/2018 03:30:02 AM PDT	Expired	ITEST: Building STEM Identity in Native American Students with UAV Technology	Eitel, Karla Bradley	IRB	15-849	11/30/2018

## Project Tasks

This provides a summary of all project (proposal) related tasks assigned to you. More details are provided in this view compared to 'All Tasks.'

Open each task to view and complete.

Click to open	Task Type	Received	Proposal Status	Proposal Number	Sponsor Due	Proposal Title	Principal Investigator	Form Type	Primary Research Administrator	Sponsor
	Project Waiting Submission	01/16/2019 01:38:06 PM PST	Draft	19039 <Not Assigned>	01/17/2019 <Not Assigned>	Test proposal	Bradley, Karla Eitel	Proposal Form		National Science Foundation

## Proposal Assistant

This panel provides widgets that allow you to search for items within the module. Click on the gear icon to organize your widgets or close this panel.

The Grant Opportunities widget allows you to search for Grants.gov opportunities. (See screenshot below.)

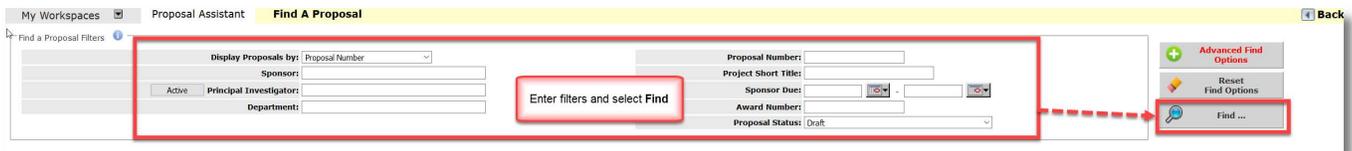
- This is the same process as previously described in the [Grants.gov Submissions - Select or download opportunity packet](#), 'Add a New Grant Opportunity,' section this manual.



The Find a Proposal widget is available to users with a specific role (e.g., DGAs and Department Administrators) and allows access to all proposals for the departments associated with the user's profile.



Enter filters to narrow down your search and select the **Find** button. Results are displayed in the table, 10 results per page, and may be sorted by column.



Sort by any one of the results columns. This example is sorted by PI

Open	View Details	Proposal Status	Proposal Number Award Number	Sponsor Due Grant Office Use	Proposal Title	Project Short Title	Principal Investigator	Sponsor
		Draft	19066 <Not Assigned>		Bergeron Test 999	Bergeron Test 999	Bergeron, Kelly	
		Assigned			Biotic and abiotic factors influencing population dynamics of Yellowstone Cutthroat Trout and Utah Chubs in Henrys Lake		Conway, Courtney J. J	US Geological Survey
		Unari	<Not Assigned>	01/17/2019	Test proposal	Test proposal	Eitel, Karla Bradley	National Science Foundation

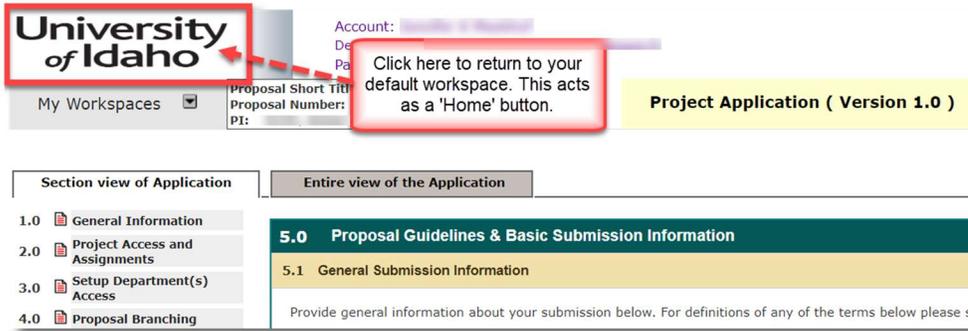
The Post Award Monthly Tasks is not currently in use. Please look for this in a future enhancement.



# Pro Tips and Tricks

## Home button

To return to your default workspace, click on the University of Idaho logo. This acts as a home button.



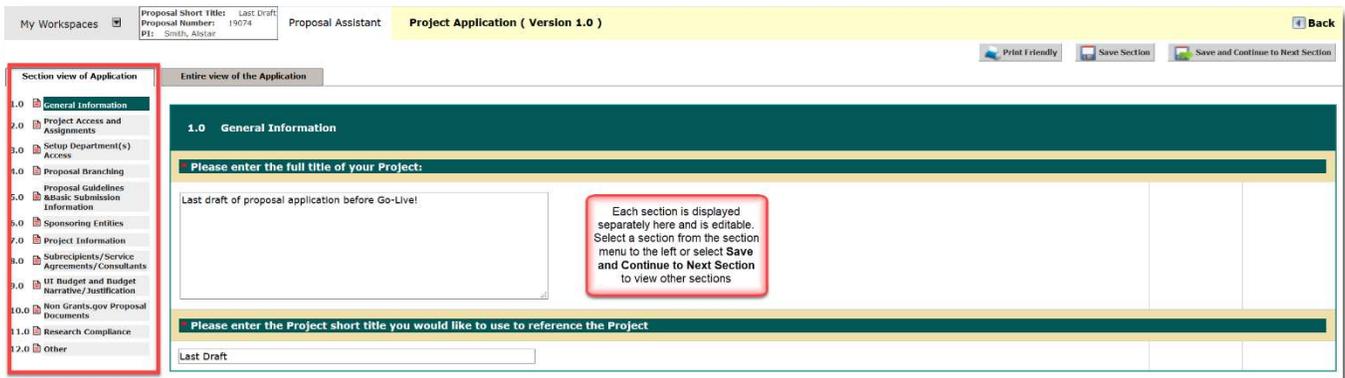
## Proposal Application: Section view/Entire view

There are two ways to view a proposal application:

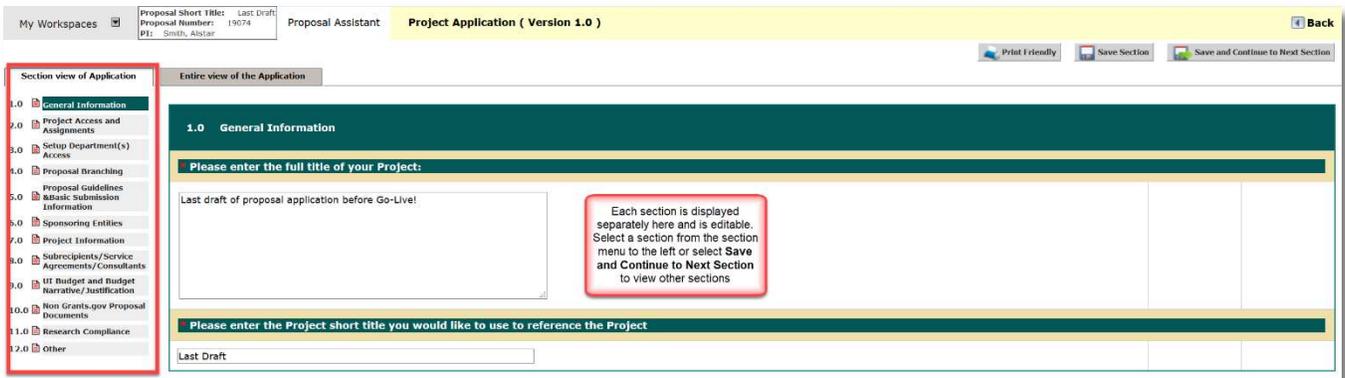
1. Section view: displays each section separately, new sections become available when the



button is selected.

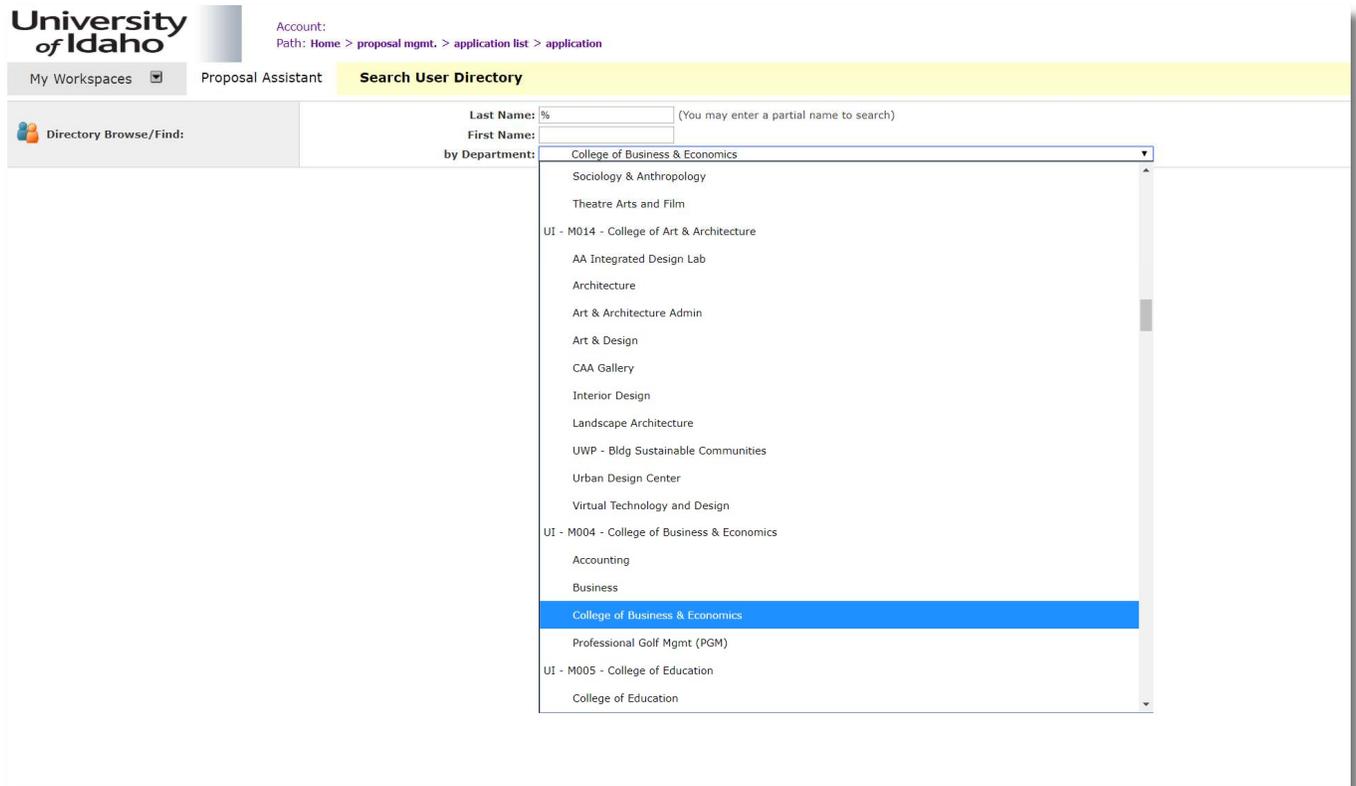


2. Entire view of the Application: displays all *completed* sections of the application in a read-only format with the ability to scroll through the completed sections. This may be a helpful view for department editors or other reviewers. You may also use the Print Friendly button to create a separate window for viewing the application while still working elsewhere in the system



## Search User Directory

When searching for personnel to add to a project, type a wildcard “%” into the last name, select the Department drop down list box and type the first few letters of the department you would like to find, then select . Note: the departments in the screenshot will be updated to the Banner 9 departments.



## Return to Application from the Budget

To return to your application form from within the budget section, select the back button a few times or select ‘application’ from the Path information found under the system user information:

