GUIDE
Budget Overview

Contents

Budget Basics

➢ If you are submitting via Grants.gov, you will need to build out a <u>Full Detail Budget</u> using Streamlyne.

➢ Good news! If you are creating your budget via Research.gov or another sponsor portal/website, you do not need to recreate your budget in Streamlyne. You should enter only a <u>Quick Budget</u> comprising the budget terms, periods and totals. You will also need to upload a copy of your budget worksheet, budget justification, and/or any budget related items (e.g, subawards, cost share documentation) in the **Internal Attachments** section of Streamlyne.

The budget format (e.g., Quick Budget vs. Full Detail Budget) is determined by the proposal template that is selected during proposal creation.

> **SEE ALSO: HOW TO <u>CHANGE THE PROPOSAL TEMPLATE</u>**

    S2S (Grants.gov) → Full Detail Budget
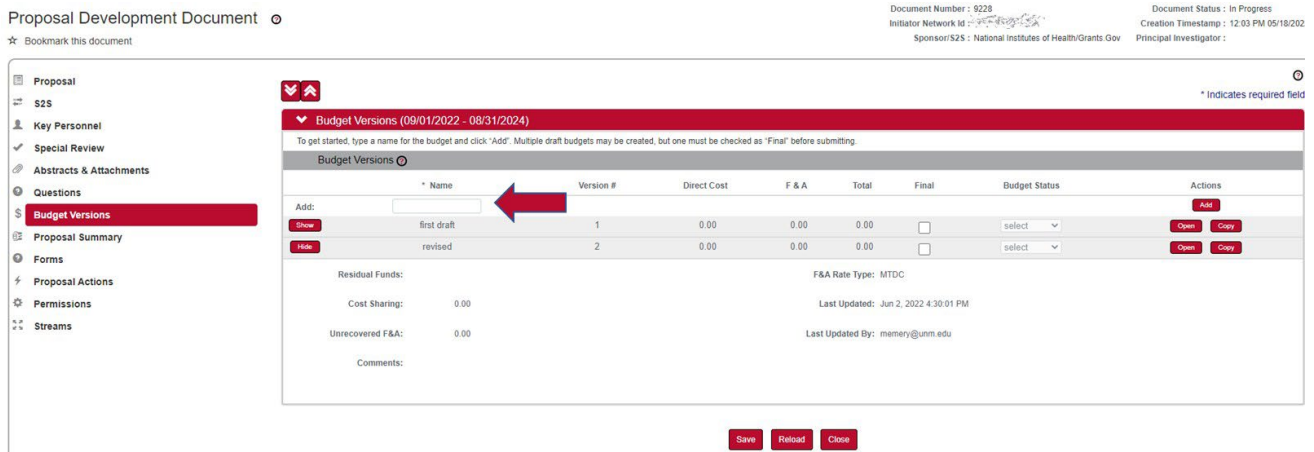
    All other submissions → Quick Budget

Understanding Budget Versions

Budget creation is found by choosing the **Budget Versions** section from the Proposal Development Quick Menu on the left side of your screen.

Streamlyne allows users to create multiple draft versions of a project budget, but only one may be selected as the **Final** budget.

CREATING A BUDGET VERSION

To create a new draft budget, find the section at the top of the **Budget Versions** pane that begins with **Add:** and provide a **Name** for the budget. This name is for internal use only and will not be transmitted to the sponsor. Click the red **Add** button to save the new budget.

You should now see a section appear below with the title of the new budget. Any previously-created budget versions will also be shown.

EDITING A BUDGET VERSION

After one or more draft budgets have been created, they will appear in the **Budget Versions** panel. You may **Show** or **Hide** details of these versions, such as when they were last updated, by selecting the corresponding red button to the left of the budget name.
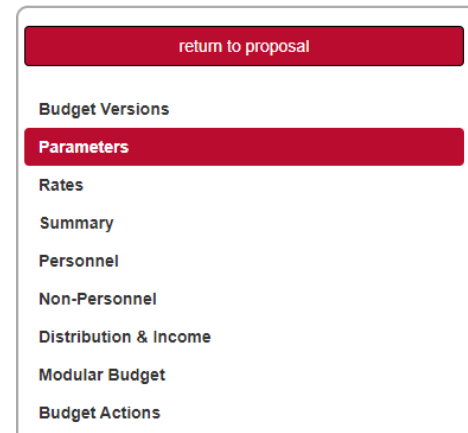

To work on a budget or view the budget details, select the **Open** button to the right of the project name.

The **Copy** button to the right of the project name behaves like a "Save As…" function if you want to work on a new copy of your draft budget without replacing the original version.

Once you have opened the budget, you will see the Budget Quick menu at the left side of the screen. Click **return to proposal** to access the other proposal development sections.

QUICK BUDGET (NON-S2S SUBMISSIONS)

The Quick Budget template only applies to non-S2S submissions, i.e., when the proposal will be transmitted to the Sponsor outside of the Streamlyne System. For Grants.gov S2S submissions, refer to the guide for the **Full Detail Budget**.

The **Quick Budget** template is designed to avoid the burden of entering budgets in multiple places. However, UNM OSP must have all budget information to process any proposal.

(a) The PI must provide a budget worksheet and budget justification in the **Attachments & Notes** section of Streamlyne.

(b) The PI is responsible for providing the approved budget to the Sponsor in the format required by the Sponsor (e.g., in Research.gov).

1. Refer to the Office of Sponsored Projects website (https://osp.unm.edu/forms/index.html) to access the Budget Template and Budget Justification Template. These tools will help ensure that your proposal budget is calculated correctly.

2. Once one or more budget versions have been created (see above), click the **Open** button next to a version to enter the budget **Parameters**.

return to proposal
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3. The **Budget Overview** panel collects important information which will be used to determine the project budget requirements.

Budget Overview

Select applicable rates and indicate the use of a modular budget (NIH only) or cost sharing. If cost sharing or reduced F&A rate is selected, documentation must be included as an Internal Attachment in the Abstracts & Attachments section.

Budget Overview ⓘ

* Project Start Date : 01/01/2023
* Project End Date : 12/31/2024
Total Direct Cost Limit : 0.00
Final? ☐
Budget Status : Incomplete
On/Off Campus : On Campus
Comments :

Modular Budget? ☐
Residual Funds :
Total Cost Limit : 0.00
* F&A Rate Type : MTDC
Submit Cost Sharing? ☐

a. Ensure that the **Project Start Date** and **Project End Date** are correct. If not, return to the **Proposal** section and edit the dates under **Required Fields for Saving Document**.

b. Indicate whether the project effort will be **On/Off Campus**. This field will be used to determine the applicable F&A Rate.

> *On-Campus is selected by default. Off-Campus Rates require prior approval. Please consult the "On-Off Campus Rate Determination" memo and attach a signed F&A Reduction Request Form in the **Attachments & Notes** section of Streamlyne.*

c. Enter the applicable **F&A Rate Type** (cost basis).

> MTDC: modified total direct costs (default). Should apply to most projects.
> MTDC-DoD: for Department of Defense projects.
> TDC: total direct costs. Applicable only if specified in sponsor solicitation.

d. Other fields are optional. Please indicate whether **Cost Limits** or **Cost Sharing** apply to the proposal. Use **Comments** to indicate anything else OSP will need to know about your budget (e.g., use of non-standard F&A rate).

4. Enter the summary budget information in the **Budget Periods & Totals** panel.
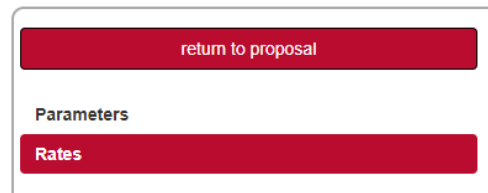   a. Verify or edit the **Period Start Date** and **Period End Date** for each budget period. Use **Add** and **Delete** as necessary to adjust the number of budget periods. Click **Default Periods** to create 12mo periods based on project start date.

Budget Periods & Totals

Designate start and end dates for each budget period. Click "Default Periods" to create 12mo periods based on project start date. S2S submissions: Verify calculated costs based on budget line items. "Calculate All Periods" updates totals from budget line items. "Generate All Periods" copies budgeted items from period 1 to all periods, applying escalations. Non-S2S submissions: Manually enter total direct and F&A costs for each budget period. Include budget spreadsheet as an Internal Attachment in the Abstracts & Attachment section. See Rates tab for current F&A rates.

Actions	#	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
Add					0.00	0.00	0.00	0.00	0.00	0.00	0.00
Delete	1	09/01/2022	08/31/2023	12.0	152,500.00	100,000.00	52,500.00	0.00	0.00	0.00	0.00
Delete	2	09/01/2023	08/31/2024	12.0	152,500.00	100,000.00	52,500.00	0.00	0.00	0.00	0.00
Delete	3	09/01/2024	08/31/2025	12.0	152,500.00	100,000.00	52,500.00	0.00	0.00	0.00	0.00
Totals		09/01/2022	08/31/2025	36.0	$ 457,500.00	$ 300,000.00	$ 157,500.00	$ 0.00	$ 0.00		

Generate All Periods Calculate All Periods Default Periods Save Reload Close

b. Enter the summary budget information for each budget period, as below:
   Total Sponsor Cost = Total Budget = Total PROJECT plus all F&A
   Direct Cost = Total Direct Cost (not including consortium F&A)
   F&A Cost = Facilities & Administrative costs
   Cost Sharing = total cost share, as applicable and approved

*The **Rates** tab provides current F&A and Fringe Benefits rates and may be used as a reference in calculating your budget.*

return to proposal
Parameters
Rates

c. You must provide Office of Sponsored Projects with your detailed budget calculations. Upload the UNM budget template (https://osp.unm.edu/forms/index.html) or sponsor-specific budget worksheet as an Internal Attachment in the **Attachments & Notes** tab.

VIEWING YOUR BUDGET

Once you have constructed your budget, the totals will appear next to the respective budget name in the **Budget Versions** panel.

❯ Budget Versions (01/01/2023 - 12/31/2023)							
To get started, type a name for the budget and click "Add". Multiple draft budgets may be created, but one must be checked as "Final" before submitting.							
Budget Versions ⓘ							
* Name	Version #	Direct Cost	F & A	Total	Final	Budget Status	Actions
Add:							Add
Hide	draft budget	1	204,843.26	107,542.72	312,385.98	☐	Incomplete ⌄	Open Copy

- To view the totals *by project period*, open the corresponding budget and scroll down to the **Budget Periods & Totals** panel. If you do not see this, select **Parameters** from the Quick Menu.

- <u>For Full Detail Budgets</u>: to view the totals *by budget category*, select **Summary** from the Budget Quick Menu. You can select **Show** or **Hide** to expand or collapse the major budget categories in order to view the component line items.

- Finally, you may *download and print* out different views of your budget by selecting the **Budget Actions** item from the Budget Quick Menu. Under **Print Forms**, you will see various report options, such as a salary report and costshare summary. Check the report(s) and click the corresponding red button labeled **Print**.
  - Under the **Print Budget** Header, printing the **RR_Budget** allows you to preview the budget in the R&R format standard for submissions to federal funding agencies.

Final Budget Steps

SELECTING A BUDGET FOR SUBMISSION

In order to validate your budget and submit the proposal package for routing, you must confirm that the final budget is complete.

1. Select **Budget Versions** from the Proposal Quick Menu or the Budget Quick Menu to view all available budgets.

2. Find the correct budget version and select the box marked **Final**. Only one budget can be identified as the final budget.

   Hint: You can still edit a budget marked as Final. This selection is only used to identify which budget is the correct one for submission.

3. Find the correct budget version and change the **Budget Status** field from *Incomplete* to *Complete*. Once you have done so, the budget will be locked for editing unless there are errors to correct. You can change the status back to *Incomplete* at any time prior to routing to continue editing.

❯ Budget Versions (09/01/2022 - 08/31/2024)

To get started, type a name for the budget and click "Add". Multiple draft budgets may be created, but one must be checked as "Final" before submitting.

Budget Versions ⦿

	* Name	Version #	Direct Cost	F & A	Total	Final	Budget Status	Actions
Add:								Add
Show	updated	2	100,000.00	39,000.00	139,000.00	☑	Complete ⌄	Open Copy
Show	a	1	100,000.00	0.00	100,000.00	☐	Incomplete ⌄	Open Copy

4. If this is a Grants.gov submission, ensure that a budget form and a subaward attachment (if applicable) have been selected in the **S2S Forms** menu.

CHECKING YOUR FINAL BUDGET FOR ERRORS

Streamlyne includes a data validation tool which checks the budget for errors.
Common errors include:

- No budget is selected as **Final**, or the budget has not been identified as *Complete*
- Required fields are blank
- Start and end dates are illogical
- Cost sharing is indicated but costs are not allocated to an index

Validation is performed automatically before a proposal is routed. Data validation can be accessed on demand in two places. To check only the budget, select **Budget Actions** from the Quick Menu within the budget tool. To check the full proposal including the budget, select **Proposal Actions** from the Proposal Development Quick Menu.

1. Expand the **Data Validation** pane and click the red button to **Turn On Validation**.

2. When error checking is complete, a list of **Errors** and **Warnings** will appear in this section. Errors must be fixed prior to submitting the proposal for routing. Warnings usually require attention, but the proposal may still be routed for approval.

3. To fix an error, select the red **Show** button next to the error. This will provide more information and reveal a red **Fix** button that will link you to the area where the error occurred.

   Hint: Data validation only checks for 'structural' errors in your budget/proposal. It cannot determine if you have miscalculated while entering budget line items.

   Hint: Leaving Data Validation turned on will cause significant lag times as you navigate your proposal document. We recommend turning it on only as needed to check for errors. Turn it off again as you resume editing.

Overview of the Budget Quick Menu

You may not see the full menu shown here. The appearance of the budget quick menu will change depending on the proposal template being used.

Return to Proposal: Used to exit the budget tool and return to the main Proposal Development module.

Budget Versions: Create new draft budgets. View existing budget versions and select one for editing. Select the final budget for submission.

Parameters: This screen opens first when a budget version is selected for editing. Edit the basic parameters that apply to the entire project budget, including indirect cost (F&A) rate types, sponsor cost limits, and the use of cost sharing or a modular budget. Define start/end of budget periods and view active tally of cost totals budgeted to date.

Rates: Defines the applicable F&A, fringe benefit, and salary inflation rates to be applied in budget calculations. Federally-negotiated rates are automatically applied to Grants.gov S2S budgets. Custom rates may be used, but this should not be changed without sponsor requirement or UNM administrative approval.

Summary: Overview of the budget by category and period.

Personnel (S2S Only**)**: Itemize the personnel portion of the budget. Add named and "to-be-named" individuals, designate periods of work and sponsored effort. Refer to the manual for Full Detail Budgets.

Non-Personnel (S2S Only)**:** Itemize non-personnel direct costs for the project, including equipment and rents, travel, participant support, materials and supplies, and other direct costs. Refer to the manual for Full Detail Budgets.

Distribution & Income: Allocate cost-sharing and project income, where applicable.

Modular Budget (S2S Only)**:** Access the simplified tool for creating modular budgets. This format is allowable only for particular proposals to PHS agencies (refer to the program solicitation and to https://grants.nih.gov/grants/how-to-apply-application-guide/format-and-write/develop-your-budget.htm#modular)

Budget Actions: Download/print R&R budget forms and other budget summary reports. Upload subaward budgets for S2S proposals. Perform data validation to check budget for errors.