

Proposals must be completed and routed seven (7) business days before the deadline for OSP to submit the proposal.

## Creating a Detailed Budget

The GeauxGrants Budget tab replaces the need to separately complete an excel spreadsheet for your proposal. The budget will automatically calculate salary, fringe benefits, tuition remission and indirect costs. You can also export the budget to excel or to the Grants.gov budget PDF.

These instructions must be followed unless the sponsor has a required budget template that must be used. When sponsor has a required budget template follow instructions for [Creating a Simplified Budget](#).

## Budget Tips

- The Budget tab will open in a new window. Clicking Done will close just the budget screen and return user to Proposal Development record.
- It is recommended that you enter budget as a whole instead of by each budget period.
- The Budget Summary will summarize the total costs of the entire institution budget.
- Other sections on the screen include Personnel Costs, Non-Personnel Costs, Subawards, and Subprojects, which is equivalent to SPS Tasks.
- Only upload a separate budget when the sponsor has a required budget template.
- If the budget period is not a full twelve month period or does not start on the first of the month, we recommend following the steps in our [removing appointments guide](#) for Named personnel. Failure to remove the Salary appointment can cause incorrect calculations due to the system calculating at a daily rate instead of the normal monthly.

## Budget – Named Personnel

- **Step 1:** The PI of the proposal will automatically appear under the Personnel section. To enter other Personnel, begin typing last name, first name and then choose from list. Select Type & Role from dropdown options and click Add Person.

PERSONNEL [Hide]			PERIOD 1	PERIOD 2	DIRECT COSTS
Detail	Tiger, (L14) Mike	PD/PI	\$ 28,800	\$ 29,376	\$ 58,176
Subtotal Personnel:			\$ 28,800	\$ 29,376	\$ 58,176

Louisiana State Univer | Add New Profile | Begin typing to select Personnel Name... | -- Select Type -- | -- Select Role -- | Add Person

- **Step 2:** Click Detail button by person's name to make edits to their salary and effort. All LSU appointments will be loaded from Workday. This Mike the Tiger has a Calendar appointment; therefore, GeauxGrants will only allow Calendar months to be entered.
- **Step 3:** On the Detail popup, enter the requested person months.
  - **Step 3a:** Click Save and fringe benefits will automatically be calculated based on personnel type. If you are adding a named Graduate Assistant, see separate user guide for [Budgeting for Graduate Assistants – Named](#)
  - **Step 3b:** Choose Effort from dropdown list if sponsor requests salaries in percent effort instead of person months.

Budget Detail for: Tiger, (L17) Mike

Detail Appointments Justifications Cost Sharing Effort Periods Save and Close Save Close

Costs by Budget Period Effort Show Calculation Details

PERIOD	ROLE	BASE SALARY	EFFORT	SALARY		FRINGE BENEFITS	TOTAL	MANUAL*
1	PD/PI	75,000	16.667	12,500	Employee	5,125	\$ 17,625	<input type="checkbox"/>
2	PD/PI	75,000	16.667	12,500	Employee	5,125	17,625	<input type="checkbox"/>
Total				\$ 25,000		\$ 10,250	\$ 35,250	

\*\*Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.  
\*Increments marked manual will ignore defined appointments for purposes of calculations.

- **Step 4:** Click Appointments tab, to select a percent to calculate inflation in the out years. GeauxGrants will automatically calculate this inflation on the Detail tab. Enter inflation and click Save. *Note: Appointments dates are for calculation purposes only. Workday is the official system for all employee appointment dates.*

Budget Detail for: Tiger, (L17) Mike

Detail Appointments Justifications Cost Sharing Effort Periods Save and Close Save Close

Salary/Payroll Information Refresh From Profile Add Appointment

APPOINTMENT	APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS	NET SALARY	DELETE
Type: Calendar Months: 12 Continue <input checked="" type="radio"/> Recycle <input type="radio"/> Annual Inflation 2% <input type="checkbox"/> Apply inflation on the Primary Appointment Anniversary Date	S: 01-Jan-2019 E: 31-Dec-2019	75,000 Per Appt	Employee Amount: 33,000	108,000	X
Total:				108,000	

Budget Detail for: Tiger, (L17) Mike

Detail Appointments Justifications Cost Sharing Effort Periods Save and Close Save Close

Costs by Budget Period Person Months Show Calculation Details

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY		FRINGE BENEFITS	TOTAL	MANUAL*
1	PD/PI	75,000	2.00	0.00	0.00	12,500	Employee	5,125	\$ 17,625	<input type="checkbox"/>
2	PD/PI	76,500	2.00	0.00	0.00	12,750	Employee	5,228	17,978	<input type="checkbox"/>
Total						\$ 25,250		\$ 10,353	\$ 35,603	

\*\*Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.  
\*Increments marked manual will ignore defined appointments for purposes of calculations.

- **Step 5:** Click Save and Close once information has been entered.



**Note:** Personnel direct costs on Budget Detail includes both requested salary and fringe benefits.

Personnel [Hide]		Amount includes both requested salary and Fringe Benefits			
	NAME		PERIOD 1	PERIOD 2	DIRECT COSTS
Detail	Tiger, (L17) Mike PD/PI		\$ 17,625	\$ 17,978	\$ 35,603
Subtotal Personnel:			\$ 17,625	\$ 17,978	\$ 35,603

### Budget – Unnamed Personnel

To add an unnamed position or To Be Hired (TBH), follow these steps:

- **Step 1:** Click Add New Profile
- **Step 2:** In pop-up window, make sure Temporary Profile is marked
- **Step 3:** Type position description as Last Name & (i.e. Graduate Assistant)
- **Step 4:** Enter Department
- **Step 5:** Click Save
- **Step 6:** Click Close
- **Step 7:** On Personnel tab, select Type (Key or Non-Key)
- **Step 8:** Select Role.
- **Step 9:** Click Add Person

Personnel [Hide]

Detail Tiger, (L17) Mike PD/PI

Louisiana State Univer Add New Profile Graduate Student, - LSUAM | Sch of VETM | Pat Non-Key Graduate Student Add Person

New Profile Save Close

Genius Profile  Temporary Profile  **2**

Salutation

First Name

Middle Initial

\* Last Name  **3**

Suffix

Degrees

Title

Phone

Fax

Email

Address

City

State

Zip

Country  **4**

\* Department [LSUAM](#) | [Sch of VETM](#) | [Pathobiological Sciences](#) | [CC00293](#)  
Employee ID [Set](#)

- **Step 10:** The Budget Detail window will appear for the unnamed personnel/TBH you just entered. Enter number of personnel, effort months & salary requested. Calculate the salary based on the total number of personnel for each role. For example: If there are 2 graduate assistants on the project, enter 2 in the Number of Personnel column and the total salary for both graduate assistants in the Salary column.
- **Step 11:** Click the white arrow on the Fringe Benefits Column and choose the appropriate type from the dropdown list.
  - Faculty and Staff = Employee
  - Graduate Assistants = Health Insurance will populate under Fringe and Tuition remission will populate under Non-Personnel.
    - GA Calendar Health/Tuition
    - GA Academic Health/Tuition
    - GA Summer Health/Tuition
  - 2-Year Postdoctoral Researcher, 2-Year Postdoctoral Researcher (AP), 2-Year Intern-Athletic, and 2-Year Intern-Non-Medical job codes = 2-Year Postdoc/Intern
  - Transient, Continent Workers, WAEs = Transient
- **Step 12:** Enter inflation for out years if desired.
- **Step 13:** If sponsor requests salaries in percent effort instead of person months, select Effort from the Person Months dropdown.
- **Step 14:** Click Save and Close to calculate.

Budget Detail for: Graduate Student,

Detail Appointments Justifications Cost Sharing Effort Periods Save and Close Save Close

Costs by Budget Period

Person Months Show Calculation Details

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Graduate Student	2	6.00	0.00	0.00	40,000	GA Calendar H... 1,081	\$ 41,081
2	Graduate Student	2	6.00	0.00	0.00	40,000	GA Calendar H... 1,081	41,081
Total						\$ 80,000	\$ 2,162	\$ 82,162

## Budget – Non-Personnel

There are 2 ways to add non-personnel cost: 1) Choose categories from dropdown list or 2) Click Add Bulk Entry to add up to 5 categories at a time.

Non-Personnel [hide] Step 2 Add Bulk Entry

DETAIL	CATEGORY	PERIOD 1	PERIOD 2	DIRECT COSTS
Detail	Tuition Remission	\$ 14,400	\$ 14,400	\$ 28,800
Subtotal Non-Personnel:		\$ 14,400	\$ 14,400	\$ 28,800

Select Budget Category Add Item

- **Step 1:** Choose from dropdown list.
  - **Step 1a:** Select cost category from dropdown list or type name and then select.
  - **Step 1b:** Click Add Item
  - **Step 1c:** On the popup, enter amount requested on the Detail tab. Year 1 amount will populate into out years. Enter inflation rate for the out years, if desired. You can also manually adjust out years.
  - Note: Tuition Remission is automatically added for Graduate Assistants from the Personnel section.

Non-Personnel Costs


Detail Justifications Cost Sharing Show Calculations Save and Close Save Close

Costs by "Budget Period" Annual Inflation Manual Entry Description Travel-Domestic

PERIOD	START DATE	END DATE	TOTAL
1	01-Jan-2020	31-Dec-2020	5,000
2	01-Jan-2021	31-Dec-2021	5,000
Total			\$ 10,000

- **Step 2:** Click Add Bulk Entry
  - **Step 2a:** Click Add Bulk Entry
  - **Step 2b:** Select cost categories from dropdown list or type name and then select.
  - **Step 2c:** Enter requested amounts and inflation, if desired. You can also manually adjust out years.
  - **Step 2d:** Click Add and click Close when done. Cost categories will populate under Non-Personnel. You can enter five (5) line items at a time.

**Non-Personnel Costs**

**Bulk Entry**  Add Close

	INFLATION		AMOUNT
Select Budget Category	Period 1	%	\$ 0
Description:	Period 2	%	\$ 0
Inflation: Manual Entry			
Select Budget Category	Period 1	%	\$ 0
Description:	Period 2	%	\$ 0
Inflation: Manual Entry			
Select Budget Category	Period 1	%	\$ 0
Description:	Period 2	%	\$ 0
Inflation: Manual Entry			
Select Budget Category	Period 1	%	\$ 0
Description:	Period 2	%	\$ 0
Inflation: Manual Entry			

### Budget – Subawards

See separate user guide for including [Subawards](#) in your proposal and budget.

### Budget – Subprojects

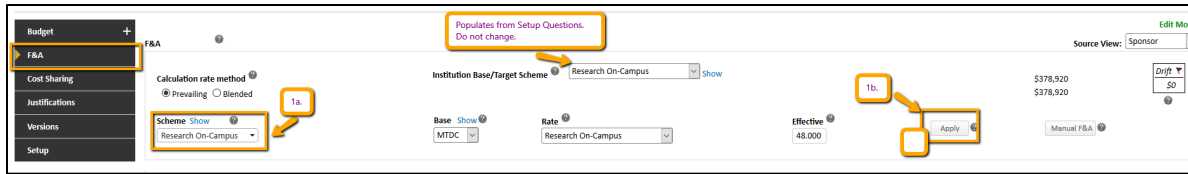
Contact OSP for assistance.

### F&A Tab

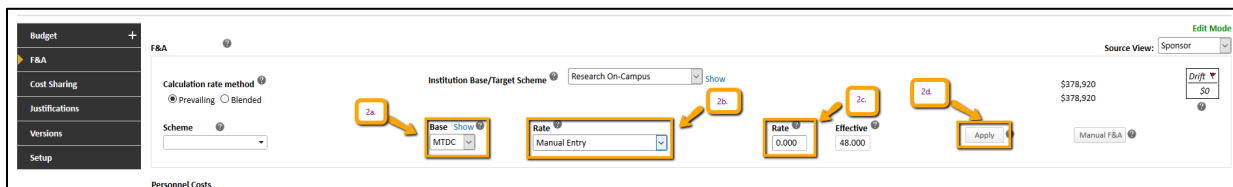
- F&A is automatically calculated based on the federally negotiated rate for Program Type and Location (on-campus vs. off-campus) of the project. See the bottom of the Budget Detail page.

	PERIOD 1	PERIOD 2	PERIOD 3	PERIOD 4	PERIOD 5	TOTAL COSTS
Total Sponsor Direct Costs:	\$ 194,380	\$ 162,410	\$ 165,530	\$ 168,744	\$ 172,055	\$ 863,119
Sponsor F&A:	73,003	74,353	75,742	77,174	78,648	378,920
Total Sponsor Costs:	\$ 267,383	\$ 236,763	\$ 241,272	\$ 245,918	\$ 250,703	\$ 1,242,039

- To adjust F&A, you will need to click on the F&A Tab. Institution Base/Target Scheme is equal to federal rate for Project Function and On/Off Campus location. Do not change.
- Step 1:** Projects funded by Louisiana state or local government (not federal flow-through)
  - Step1a:** Change Scheme to Project Function or Off-campus for State (e.g. Research State On-Campus.)
  - Step 1b:** Click Apply to calculate.



- **Step 2:** Projects with Sponsored Limited rates
  - **Step 2a:** Select sponsor published base. Options are Manual, Modified Total Direct Costs (MTDC), Salaries, Wages and Fringe Benefits (SWF), and Total Direct Costs (TDC). If a sponsored limited base is not specified select TDC. If sponsor has a different base type, select Manual.
  - **Step 2b:** Choose Rate of Manual Entry for limited rate. Choose rate of No IDC when sponsor does not allow F&A.
  - **Step 2c:** For Manual Entry, a Rate box appears. Enter the sponsor limited rate.
  - **Step 2d:** Click Apply to calculate.



- Summary of F&A, which includes rate used, is at the bottom.

F&A Breakdown							
PERIOD	START DATE	END DATE	INDIRECT COST TYPE	RATE	BASE	AMOUNT	
1 Detail	01-Jan-2020	31-Dec-2020	MTDC	10.000	73,800	7,380	
2 Detail	01-Jan-2021	31-Dec-2021	MTDC	10.000	74,376	7,438	
Total					\$ 148,176	\$ 14,818	

- The Manual F&A button is used to enter the Sponsor F&A Base and Requested F&A amounts directly into the field versus an automatic calculation.

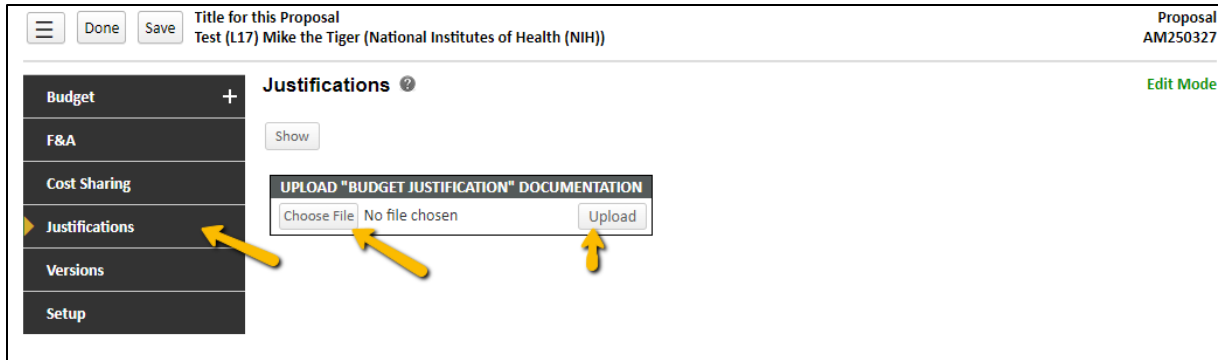
## Cost Sharing

See separate user guide for including [Cost Sharing](#) in your budget.

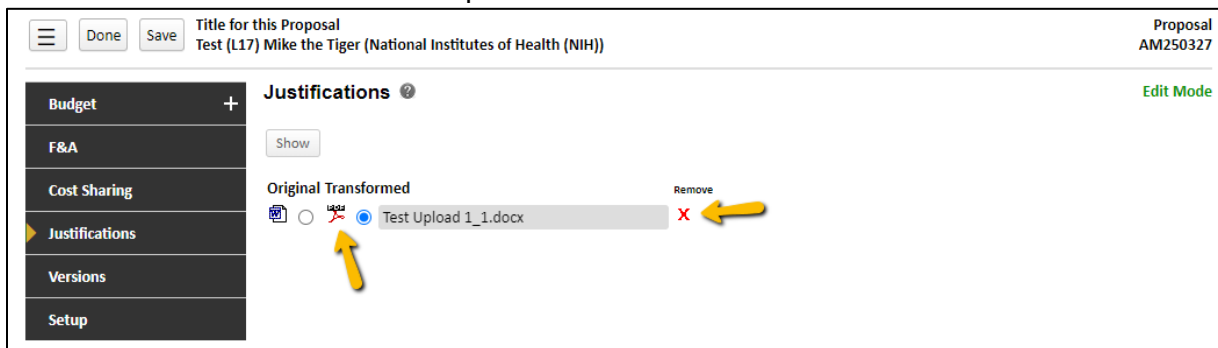
## Justifications

If required by the sponsor, upload your budget justification on this tab.

- **Step 1:** Click Choose File to attach budget justification and click Upload. You can upload Word or PDF documents. GeauxGrants will convert Word documents to a PDF.

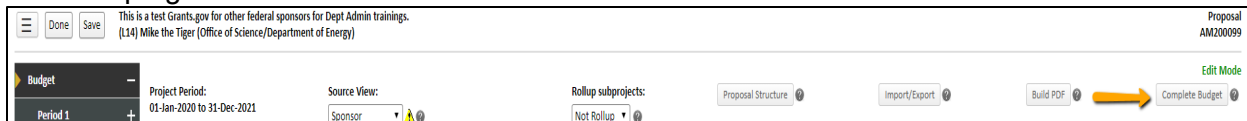


- **Step 2:** To open the uploaded file, click the PDF logo. Remove option is also available if new version needs to be uploaded.

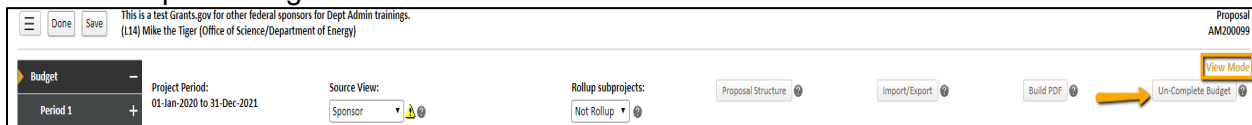


## Budget – Complete

- Once you have completed your budget, go to Budget tab and click Complete Button on top right corner.

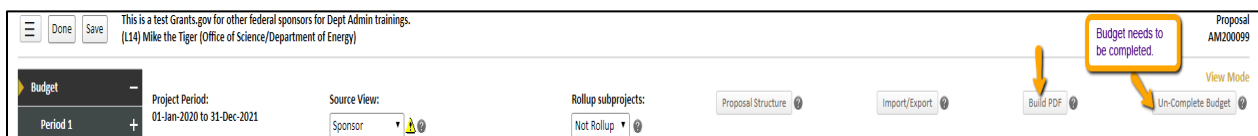


- Once Budget is complete, Budget will be in View Mode, and you will need to click on Un-Complete Budget to make edits.



## Budget – Build PDF (Grants.gov)

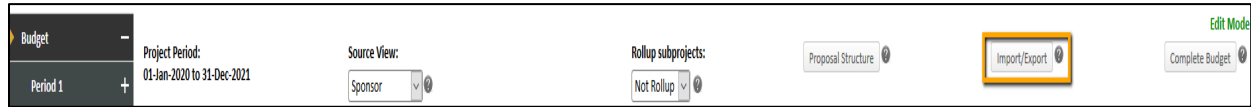
To see your budget in the Grants.gov budget format, click Build PDF after budget has been Completed.





## Budget – Export to Excel

- To export your budget to Excel to send to a sponsor, click Import/Export and then click Export Budget to Excel.



- The Excel spreadsheet will consist of several tabs:
  - Summary Tab** – breakdown of requested budget in each budget period and total amount. Personnel Salaries include both requested salary & fringe benefits. If sending this to sponsor, rename “Personnel Salaries” to “Personnel Salaries and Fringe Benefits.”

1	Budget for: This is a test manual proposal for Dept Adm				Tuesday, October 29, 2019		
2	Proposal:	AM200151					
3	Sponsor:	Alfred P. Sloan Foundation					
4	Investigator:	(L14) Mike the Tiger					
5	Project Period:	1/1/2020-12/31/2021					
6	<b>Category</b>	<b>Item</b>	<b>Period 1</b>	<b>Period 2</b>	<b>Total</b>		
7	Personnel Salaries	(L14) Mike the Tiger	28,800	28,800	57,600		
8		TBH	40,000	40,000	80,000		
9		<b>Subtotal Personnel:</b>	<b>68,800</b>	<b>68,800</b>	<b>137,600</b>		
10							
11	Materials and Supplies	Materials and Supplies	7,500	7,500	15,000		
12	Operating Services	Operating Services	25,000	25,000	50,000		
13	Travel-Domestic	Travel-Domestic	5,000	5,000	10,000		
14	Tuition Remission	Tuition Remission	14,400	14,400	28,800		
15		<b>Subtotal Non-Personnel:</b>	<b>51,900</b>	<b>51,900</b>	<b>103,800</b>		
16							
17		<b>Total Project Direct Costs:</b>	<b>120,700</b>	<b>120,700</b>	<b>241,400</b>		
18		<b>Project F&amp;A:</b>	<b>10,630</b>	<b>10,630</b>	<b>21,260</b>		
19		<b>Total Project Costs:</b>	<b>131,330</b>	<b>131,330</b>	<b>262,660</b>		
20							
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36							

- Personnel Tab** – breakdown of just personnel with fringe benefits and effort for each budget period. If sponsor does not require effort, then you can delete these columns.

	A	B	C	D	E	F	G	H	I	J
1				<b>Period 1</b>						
2				<b>Person Months</b>						
3	<b>Personnel</b>	<b>Personnel Type</b>	<b>Role</b>	<b>Cal</b>	<b>Acad</b>	<b>Sum</b>	<b>%Effort</b>	<b>Salary</b>	<b>Fringe</b>	<b>Total</b>
4	(L14) Mike the Tiger	Key	PD/PI	0.00	2.00	0.00	22.222%	20,000	8,800	28,800
5	TBH	Non-Key	Graduate	6.00	0.00	0.00	50.000%	40,000	0	40,000
6				<b>Totals</b>				<b>60,000</b>	<b>8,800</b>	<b>68,800</b>
7										
8				<b>Period 2</b>						
9				<b>Person Months</b>						
10	<b>Personnel</b>	<b>Personnel Type</b>	<b>Role</b>	<b>Cal</b>	<b>Acad</b>	<b>Sum</b>	<b>%Effort</b>	<b>Salary</b>	<b>Fringe</b>	<b>Total</b>
11	(L14) Mike the Tiger	Key	PD/PI	0.00	2.00	0.00	22.222%	20,000	8,800	28,800
12	TBH	Non-Key	Graduate	6.00	0.00	0.00	50.000%	40,000	0	40,000
13				<b>Totals</b>				<b>60,000</b>	<b>8,800</b>	<b>68,800</b>

- F&A tab** – Will not use.
- Cost Sharing tab** – breakdown of sponsor requested and cost sharing among the different sources in each budget period and total amounts. Personnel amounts

include both requested salary and fringe benefits. If sending this to sponsor, rename “Personnel Salaries” to “Personnel Salaries and Fringe Benefits.”

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Category	Item	Period 1				Period 2				Totals				Total Project Costs
2			Sponsor	Institution e	Corporation	Unallowables	Sponsor	Institution e	Corporation	Unallowables	Sponsor	Institution e	Corporation	Unallowables	
3	Personnel Salaries	(L14) Mike the Tiger	14,400	7,200	0	7,200	14,400	7,200	0	7,200	28,800	14,400	0	14,400	57,600
4		TBH	40,000	0	0	0	40,000	0	0	0	80,000	0	0	0	80,000
5		Sub-Total Personnel:	54,400	7,200	0	7,200	54,400	7,200	0	7,200	108,800	14,400	0	14,400	137,600
6															
7	Materials and Supplies	Materials and Supplies	25,000	0	25,000	0	25,000	0	25,000	0	50,000	0	50,000	0	100,000
8	Operating Services	Operating Services	25,000	0	0	0	25,000	0	0	0	50,000	0	0	0	50,000
9	Travel-Domestic	Travel-Domestic	5,000	0	0	0	5,000	0	0	0	10,000	0	0	0	10,000
10	Tuition Remission	Tuition Remission	14,400	0	0	0	14,400	0	0	0	28,800	0	0	0	28,800
11		Sub-Total Non-Personnel:	69,400	0	25,000	0	69,400	0	25,000	0	138,800	0	50,000	0	188,800
12															
13		Total Direct Costs:	123,800	7,200	25,000	7,200	123,800	7,200	25,000	7,200	247,600	14,400	50,000	14,400	325,400
14		F&A:	10,940	720	2,500	720	10,940	720	2,500	720	21,880	1,440	5,000	1,440	29,760
15		Total Project Costs:	134,740	7,920	27,500	7,920	134,740	7,920	27,500	7,920	269,480	15,840	55,000	15,840	356,160

- Fully Loaded Budget tab – We will not use.