University of Pittsburgh

PERIS
PITT ELECTRONIC RESEARCH INFORMATION SOLUTION
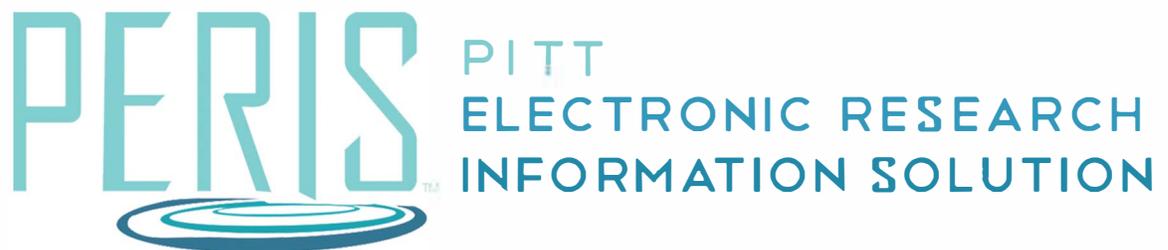
Quick Reference

Creating a Detailed Budget

Working Budgets

ID	Name
BU00000673	National Institutes of Health

Edit Budget

* Budget title: ❓

National Institutes of Health

* Principal Investigator for this budget:

Test Study Staff ▼

* Is this a Subaccount budget?

O Yes ● No   Clear

* Is this work On or Off Campus?

If you change the rate from On-Campus, it will be nec

● On Campus
O Off Campus - Adjacent
O Off Campus - Remote

* Does this budget use the standard indirect cost base and rates?

● Yes O No   Clear

Cost Base Type	Period
MTDC ▼	Start: 10/1/2018 End: 9/30/2019 Rate: ___ ▶

Organizations that will be participating in the grant subcontract: ❓

➕ Add

* Will this budget have cost sharing?

● Yes O No   Clear

  a. Cost Share Type:
    ☐ Mandatory
    ☐ Voluntary Committed
    ☐ Salary Cap

* Do you intend to complete a detailed budget?

O Yes O No   Clear

Include in proposal budget?

● Yes O No   Clear

Where to start?

1. Click on your budget link to access the Budget Workspace.

2. Click *Edit Budget*.

How do I complete the budget SmartForm?

3. The Budget title and Principal Investigator will default to entries made in the Funding Proposal.

4. If this is a Subaccount indicate Yes. *See Subaccount guide for instructions.

5. Indicate if the work is On or Off Campus. If you change the rate from On-Campus click Save for the correct rates to appear.

6. Determine if the budget uses the standard indirect cost base and rates. If not select *No*. A table will appear where you can provide the Base Type and rates being used. You will also need to indicate why standard rates are not being used.

7. If a subaward is being issued, click *+Add*. *See Subaward guide.

8. Indicate if there is cost share. If Yes, choose the Type.

9. Answer Yes that a detailed budget is being completed.

10. Multiple budgets can be created in MyFunding. Use this question to indicated that this is the budget that is to be included in the application.

Creating a Detailed Budget

Salary Cap: **11** $ 187000.00

Inflation Rate: 3 %

Add **12** 1 ▼ row: **Add**

Person: **13** Test Study Staff ▼

Appt: 12 months ▼

Role: PD/PI ▼

Key: ☑

Apply Inflation Rate: ☐

Base Salary: $ 100000.00

Effort: **14** 0 %

SalReq: 0 %   **15** ▶

FB Rate: **16** 0 %   **17** Continue »

Inflation Rate: **18** 3 %   Add **19** 3 ▼ rows: **Add**

*Cost Type: **20** Travel: Domestic ▼

Desc:

Cost: $ 5000.00

Apply Inflation: ☐

Apply Indirects: ☑

How do I complete the Personnel Costs SmartForm?

11. Review pre-populated Salary Cap and Inflation Rate entries. Edit if necessary.

12. Choose the number of individuals that you are adding to the budget and click *Add*.

13. Select the Person, their Appointment, and Role. Choose if inflation should be applied to the salary and enter the base salary.

14. Enter the Percent of Effort and percent of Salary Requested.

15. Use the > function if you would like to push figures across all rows.

16. The Fringe Benefit Rate will pre-populate. If editing is necessary, click on the FB Rate field and provide the new rate.

17. When Personnel Costs are complete click *Continue*.

How do I complete the General Costs SmartForm?

18. Review the pre-populated Inflation Rate. Edit if necessary.

19. Choose the number of general cost categories that are budgeted and click *Add*.

20. Choose a Cost Type. Indirect Costs will be included or excluded based on the Cost that is selected. If adding Equipment a Description is required. Enter the Cost. Apply Inflation if necessary.

Creating a Detailed Budget

Apply Inflation: **21** ☐

Cost: **21** **22**
$ 5000   Continue »

23
1. Attachments:
   24
   ✚ Add   Finish

21. To edit a cost uncheck Apply Inflation. Click in the field that you would like to edit and provide the new figure.

22. Click *Continue* when General Costs are complete.

How do I finish my budget?

23. Attach any budget related forms that are required for internal purposes. This may include a budget justification.

24. Click *Finish*.