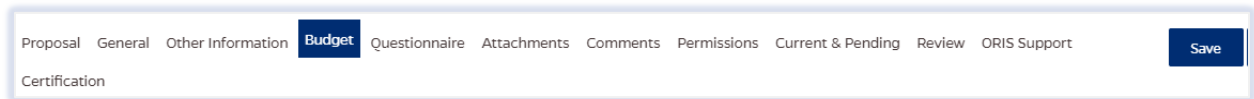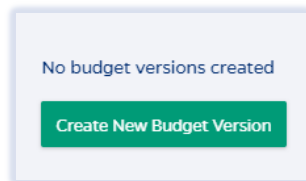# Budget

How Do I Create a Budget?

Detailed budget information is not required in Fibi since the uploaded Budget attachment contains all details.

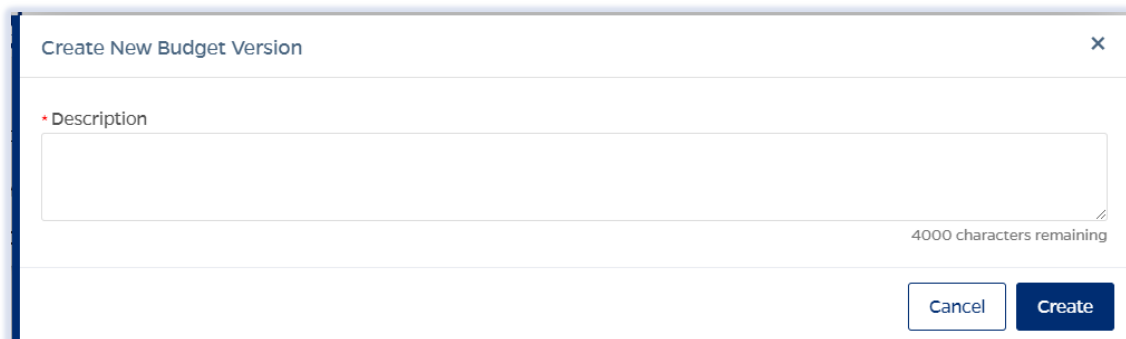Follow the directions below to input the Budget Summary information:

☐ Click on the **Budget** tab.

Proposal General Other Information Budget Questionnaire Attachments Comments Permissions Current & Pending Review ORIS Support Save
Certification

☐ Click on the **Create New Budget Version** button.

No budget versions created

Create New Budget Version

☐ Enter a description for the budget and click on the **Create** button.

Create New Budget Version ✕

• Description

4000 characters remaining

Cancel   Create

The budget page will open.

- ☐ Choose the appropriate selection from the dropdown list for the **Over Head Rate Type**.

Rate Type Abbreviation	Rate Type
MTDC	Modified Total Direct Costs
None	None
S&W	Salary and Wages
TDC	Total Direct Costs

- ☐ Choose the appropriate selection from the dropdown list for the **Budget Status.**

The budget must be marked **Complete** before the Proposal can be submitted for approval.

☐ Choose the appropriate selection from the dropdown list for **Cost Sharing.** One of these options must be selected.

Cost Sharing Type	Description
None	No cost sharing
Prohibited	The sponsor does not permit cost sharing.
Required by Sponsor	The Sponsor requires cost sharing and an attachment from the sponsor explaining the cost sharing details is required.
Voluntary	The PI has decided to cost share and has Department Business Office approval. An approval attachment must be uploaded on the **Attachment** tab.

☐ Enter text for the **Rate** in the appropriate field based on the location of the research. Both boxes may be used if appropriate.

☐ Click on the **Save** button in the upper right corner.

NOTE: This **Save** button only saves changes made to fields described above and will <u>not</u> save the **Budget Summary** table.
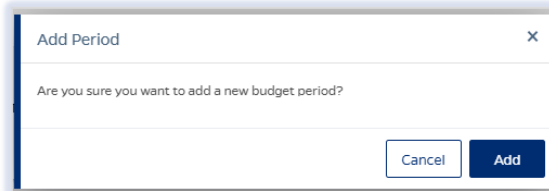

☐ Enter dollar amounts for the **Direct Costs** and the **Indirect Costs** for each Budget Period. Fibi will calculate the total cost once the information is saved. Click on the **Calculate & Save** button in the bottom right hand corner. The **Calculate & Save** button will only save changes to the budget periods table.

Changes can be made to the Start and End Dates for each line. Budget Periods can be added and deleted as well.

To add a budget period:
- ☐ Click on **Add Period** on the right side of the screen. + Add Period
- ☐ Click on the **Add** button**.**

Add Period   ×

Are you sure you want to add a new budget period?

Cancel   Add

To delete a budget period:
- ☐ Click on the **Delete** icon next to the chosen budget period. 🗑

NOTE: The budget dates must match the start and end dates entered on the **General** tab.
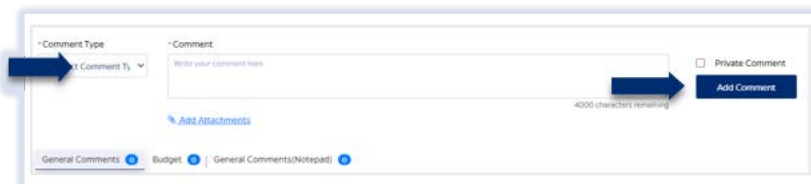
- ☐ Click on the **Calculate & Save** button Calculate & Save in the bottom right corner.

NOTE: The **Calculate & Save** button only saves changes made to the **Budget Summary table**, not the budget information at the top of the screen.

- ☐ 12. If comments are needed regarding the budget, click on the **Comments** tab in the menu bar.

Proposal   General   Other Information   Budget   Questionnaire   Attachments   **Comments**
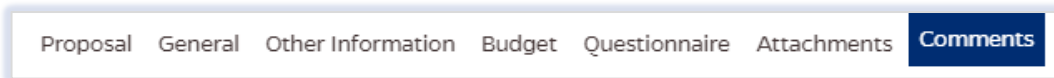
- ☐ 13. Choose **Budget** from the **Comment Type** dropdown list. Click on **Add** when satisfied with the comments entered.

To Print the Budget Summary:

1. Click on the **More Actions** icon ⋮ in the upper right corner.
2. Choose **Print Budget** for the dropdown list. The **Print Budget** option will not be available until the budget information has been entered.