

Budget

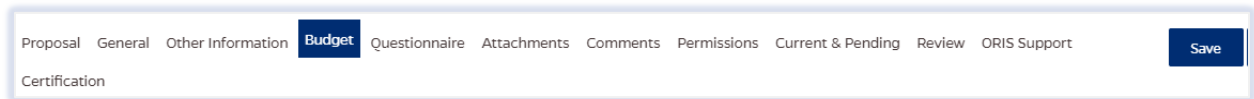
How Do I Create a Budget?



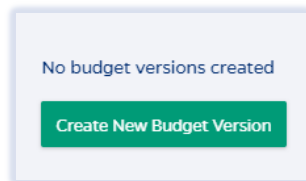
Detailed budget information is not required in Fibi since the uploaded Budget attachment contains all details.


Follow the directions below to input the Budget Summary information:

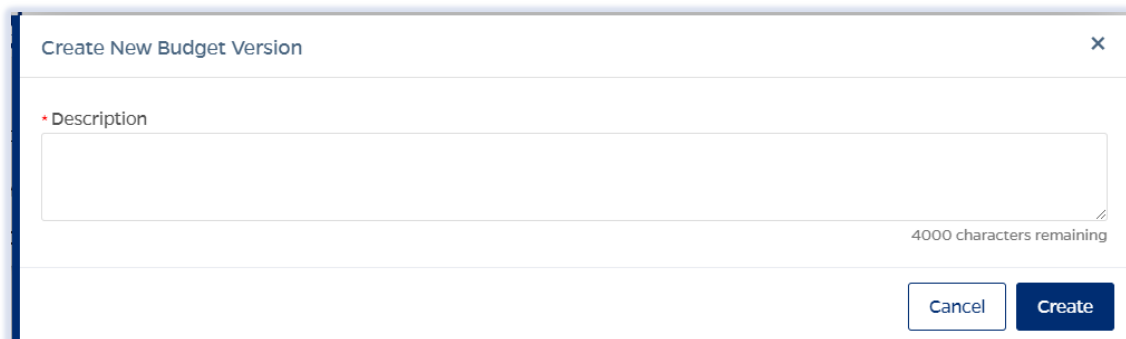
- Click on the **Budget** tab.



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



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



The budget page will open.

Proposal General Other Information **Budget** Questionnaire Attachments Comments Permissions Save Validate Submit ? : ↶

Current & Pending Review ORIS Support Certification

Budget Summary Last Updated By Gasior, Angela on 05/18/2022 11:19:15 AM ↕

Over Head Rate Type **Budget Status**

MTDC Complete

Direct Cost **Indirect Cost** **Total Cost**

\$0.00 \$0.00 \$0.00

Cost Sharing **On-Campus Rate** **Off-Campus Rate**

--Select-- Enter On-Campus Rate Enter Off-Campus Rate

Description

Version 2 3991 characters remaining

Budget Summary + Add Period

Budget Summary

Period#	Start Date	End Date	Direct Cost	Indirect Cost	Total Cost	Actions
1	05/17/2023	05/16/2024	\$0.00	\$0.00	\$0.00	🗑️
2	05/17/2024	05/16/2025	\$0.00	\$0.00	\$0.00	🗑️
3	05/17/2022	05/16/2023	\$0.00	\$0.00	\$0.00	🗑️
Total			\$0.00	\$0.00	\$0.00	

Calculate & Save

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

Over Head Rate Type

MTDC

MTDC

None

S&W

TDC

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**.

Budget Status

Complete

In Progress

Complete

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 not save the **Budget Summary** table.

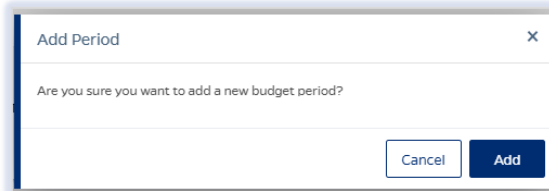
- ❑ Enter dollar amounts for the **Direct Costs** and the **Indirect Costs** for each Budget Period. Fibi will calculate the total cost once the information is saved. Click on the **Calculate & Save** button in the bottom right hand corner. The **Calculate & Save** button will only save changes to the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

Period#	Start Date	End Date	Direct Cost	Indirect Cost	Total Cost	Actions
1	08/23/2022	08/22/2023	\$0.00	\$0.00	\$0.00	
Total			\$0.00	\$0.00	\$0.00	

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. 
- ❑ Click on the **Add** button.



A dialog box titled "Add Period" with a close button (X) in the top right corner. The text inside asks, "Are you sure you want to add a new budget period?". At the bottom, there are two buttons: "Cancel" and "Add".

To delete a budget period:

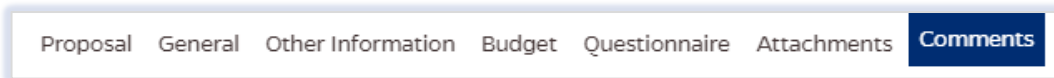
- ❑ Click on the **Delete** icon next to the chosen budget period. 

NOTE: The budget dates must match the start and end dates entered on the **General** tab.

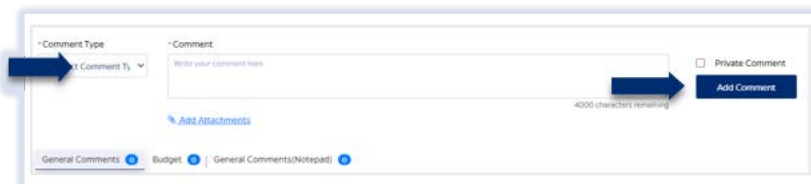
- ❑ Click on the **Calculate & Save** button  in the bottom right corner.

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.




- ❑ 13. Choose **Budget** from the **Comment Type** dropdown list. Click on **Add** when satisfied with the comments entered.



A comment form with a "Comment Type" dropdown menu set to "Budget". The "Add Comment" button is highlighted with a blue arrow. The form also includes a "Private Comment" checkbox, an "Add Attachments" link, and a character count "4000 characters remaining". At the bottom, there are three tabs: "General Comments", "Budget", and "General Comments(Notepad)".

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.