AURA Budget Creation

Contents
Budget Workspace Breakdown ...................................................................................................................................................................................... 2
Budget Workspace Breakdown ...................................................................................................................................................................................... 3
F&A Workspace Breakdown .......................................................................................................................................................................................... 4
F&A Workspace Breakdown .......................................................................................................................................................................................... 5
1.0 Budget Information .................................................................................................................................................................................................. 6
Workspace Grid Layout Breakdown .............................................................................................................................................................................. 7
  2.9 Modular Budget .......................................................................................................................................................................................... 8
  3.0 Personnel Budget ....................................................................................................................................................................................... 9
  3.1 Patient Care Budget ................................................................................................................................................................................ 10
  3.2 Travel Budget ........................................................................................................................................................................................ 11
  3.3 Animal Budget ........................................................................................................................................................................................ 12
  3.4 Animal Budget ........................................................................................................................................................................................ 13
  3.5 Trainee Costs .......................................................................................................................................................................................... 14
  3.6 Subaward Costs ...................................................................................................................................................................................... 15
  3.7 General Item Budget ............................................................................................................................................................................. 16
5.0 Budget Attachments ................................................................................................................................................................................. 17
Cumulative Budget Workspace .................................................................................................................................................................................... 18
Creating an Alternate Budget ...................................................................................................................................................................................... 19
Budget Workspace Breakdown

- Go to your AURA Workspace
  - Click into your Budget Workspace
  - Follow your link to your created Working Budget link

Open your Budget Workspace and move into your Working Budget
Budget Workspace Breakdown

- Go to your Budget Workspace
  - Click Grid: Inflation and F&A Rates

Open the F&A Grid to check your rate defaults.
F&A Workspace Breakdown

- Go to your F&A Workspace
  - Check your F&A Rate Type and Rate Percent
  - **Apply** changes and move on to **Edit Budget** on the following page

---

**Check your Rate Name, Rate Type and your Rate %.** Check the FOA and University policy for more information about F&A rates.

**You can add multiple rates if needed (next slide)**

---

**Apply your changes after you check your information**
F&A Workspace Breakdown

- Enter any F&A rates you need for your Budget
  - Enter a Rate Name
  - Select your Rate Type
  - Enter the Rate % that you are adding for your F&A Rate

Select your Rate Type
- TDC – Total Direct Cost
- MTDC – Modified Total Direct Cost
- S&W – Salary and Wages
- Educational Services
- Other – Example: Off-campus F&A

Check if there are any required F&A Rates in the FOA or within the UofC policy - questions check with your URA Manager

The Rate Name you enter shows up in Budget Grid dropdowns.
1.0 Budget Information

- Create your general budget information
  - Add a Budget Title
  - Add Choose options for Cost Sharing, F&A Waiver, Program Income, and if this will this be a Modular Budget

### General Budget Information

<table>
<thead>
<tr>
<th>Section</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td><em>Budget Title</em>: 80 characters &amp; spaces max. for NIH: TT - Testing SS</td>
</tr>
<tr>
<td>2.0</td>
<td>Principal Investigator for this budget: Pedro Peru</td>
</tr>
<tr>
<td>3.0</td>
<td>Alternate or Working Budget? Working Budget</td>
</tr>
</tbody>
</table>

#### Choose your Cost Sharing option. Please note guidelines on Cost Sharing.
- If YES – you will enter your cost share budget in your FP workspace (see image below)

#### Modular Budgets are only for NIH proposals

---

Add a Budget Title

Choose your Cost Sharing option. Please note guidelines on Cost Sharing.

If YES – you will enter your cost share budget in your FP workspace (see image below)
Workspace Grid Layout Breakdown

- **Breadcrumb line** – use to return to FP workspace
- **Inflation Rate** is a simple calculation
- **Click Add** to insert a cost
- **F&A Types** can be changed depending on the cost. Choose which F&A rate you would like to use for each cost. (Add costs on the F&A grid)
- **Use the Save** to update the #’s of the budget grid you are working on
- **Use Continue** to save your information and move on to the next grid
- **Dropdown** will help you navigate around the budget grids and menus
- **Use this button** to Remove any cost in the workspace
- **Use the blue arrows** to copy a consistent # to the following periods
2.9 Modular Budget

- Create your Module Cost Outline (if applicable)
  - Report anticipated modules needed
  - All detailed costs roll into the “Other” Budget category for simplicity
  - Only shows an option if 7.0 is YES in General Budget Information

**Modular Costs**

<table>
<thead>
<tr>
<th>Period</th>
<th>Personnel</th>
<th>Subawards</th>
<th>Other</th>
<th>Total DC Budget</th>
<th>Total F&amp;A</th>
<th>Total Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$24,700</td>
<td>$2,000</td>
<td>$4,953</td>
<td>$100,000</td>
<td>$110,204</td>
<td>$310,354</td>
</tr>
<tr>
<td>2</td>
<td>$25,441</td>
<td>$2,000</td>
<td>$1,433</td>
<td>$100,000</td>
<td>$110,204</td>
<td>$310,354</td>
</tr>
<tr>
<td>Total</td>
<td>$50,141</td>
<td>$4,000</td>
<td>$6,786</td>
<td>$200,000</td>
<td>$220,408</td>
<td>$620,708</td>
</tr>
</tbody>
</table>

**Total DC Budget** matches your Modular Costs listed below

The **Modular Offset** is the amount of non-descript (not detailed out by categories above) spending for your NIH budget

**Enter the Modular Costs budget per period.**
3.0 Personnel Budget

- **Update your Personnel Cost**
  - Add your persons by clicking the add button
    - Person ‘TBD’ to be used when you have not yet identified this person (chose Academic or Calendar year)
  - Roles should map over from FP view 8. Changes with roles, key and appointment type should be changed in master data
  - Add a description if needed and enter their base salary
  - Enter the effort and salary requirement for every person and double check the FB Rate

*Save after you add each person*

Salary Cap is defaulted by NIH Grants. Any salary over cap will be a cost share

These amounts are important for the current and pending support of Key People. This will be compared to current AURA and TRACS converted proposals

Enter the amount of Effort and Salary Requirement - usually the same amount. Any variance over effort % will be considered cost sharing.

FB Rate defaults from the sponsor and/or the Person Profile

Add a Person, Appointment, Role (maps to SF424), and Base Salary. Key will preset with your selection on FP view 8, and should not be changed in this view.
### 3.1 Patient Care Budget

- **Update your Patient Care Costs (if applicable)**
  - Add your patient care by clicking the add button
  - Type the Procedure and description
  - Choose the purpose and status of the procedure
  - Under the specific year enter the Unit cost of each procedure, number of procedures

---

This grid data maps to the SF424 for Patient Care - Clinical Trial costs are entered on 3.7 General Costs

Enter the amount of Procedures per Patient and # of Patients

Add a Procedure, Description, Purpose, Status and Cost

---

<table>
<thead>
<tr>
<th>Patient Care Costs</th>
<th>Period Start</th>
<th>Period End</th>
<th>Total Patient Care</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1/01/2011</td>
<td>7/01/2012</td>
<td>$1,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Procedure:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purpose:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unit Cost:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F&amp;A Type:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apply Inflation:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apply F&amp;A:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Patient Care:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3.2 Travel Budget

- **Update your Travel Costs (if applicable)**
  - Add your travel costs by clicking the add button
  - Add a description of your travel plans, tic if it is a foreign and the base cost
  - Under the specific year of travel mark the trip cost, number of trips and amount of people on the trip

---

**Enter Trip Cost, # of Trips and # of People**

**Enter Trip Description, Foreign (if nes), and Base Cost**
3.3 Animal Budget

- Update your Animal Ordering Costs (if applicable)
  - Add your animal ordering by clicking the add button
  - Choose the animal, enter the cost and shipping of each animal
  - Under the specific year enter the # of animals

Choose your Animal, Cost and Shipping Fee. Note: Costs are defaulted to most current rates – but can be overridden.

Enter the # Animals
3.4 Animal Budget

- Update your Animal Maintenance Costs (if applicable)
  - Add your animal by clicking the add button
  - Enter the cage cost, days in cage and # of animals in the cage
  - Under the specific year enter the # of animals.

### Animal Maintenance Costs

<table>
<thead>
<tr>
<th>Animal Maintenance Costs</th>
<th>Period 1</th>
<th>Period 2</th>
<th>Total Project Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Direct</td>
<td>$54,917</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total F&amp;A</td>
<td>$29,557</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Project</td>
<td>$84,494</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Detailed Budget Grid Data

- **Personalized:**
  - $24,700
  - $25,441
  - $50,141

- **Subcontracts:**
  - $0
  - $0
  - $0

- **Other:**
  - $3,553
  - $1,443
  - $4,976

- **Total Direct Cost (incl. F&A):**
  - $29,553
  - $26,984
  - $56,937

- **Total F&A Budget:**
  - $15,139
  - $14,439
  - $29,577

- **Total Budget:**
  - $44,746
  - $41,514
  - $86,260

<table>
<thead>
<tr>
<th>Animal Maintenance Costs</th>
<th>Period 1</th>
<th>Period 2</th>
<th>Total Project Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td># Animals:</td>
<td>5</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>Cage Cost per Day:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days per Animal:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td># Animals per Cage:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F&amp;A Type:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Choose your Animal, Cage Cost, Days per Animal and # per Cage**

- If unsure about # of Animals in a cage, the calculation is **1 Animal x # of cages** to find your total cost.
3.5 Trainee Costs

- **Update your Trainee Costs (if applicable – only Fellowships and Training Grants)**
  - Add your Trainee by clicking the add button
  - Enter roles and costs for each type of trainee - break them down by role, not individual person
  - Enter the # of trainees under each period
  - If you have trainees with different roles, add a new trainee role with the Add button

---

**Trainee Costs**

<table>
<thead>
<tr>
<th>Role</th>
<th>Period 1</th>
<th>Period 2</th>
<th>Period 3</th>
<th>Period 4</th>
<th>Period 5</th>
<th>Total Project Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition/Fees/Exp.</td>
<td>$200,000</td>
<td>$280,400</td>
<td>$287,052</td>
<td>$305,956</td>
<td>$315,144</td>
<td>$1,496,680</td>
</tr>
<tr>
<td>Stipends</td>
<td>$20,000</td>
<td>$20,600</td>
<td>$21,200</td>
<td>$21,856</td>
<td>$22,512</td>
<td>$106,181</td>
</tr>
<tr>
<td>Training Related Exp.</td>
<td>$5,000</td>
<td>$6,180</td>
<td>$6,566</td>
<td>$6,752</td>
<td>$6,912</td>
<td>$31,662</td>
</tr>
<tr>
<td>Travel</td>
<td>$12,000</td>
<td>$12,360</td>
<td>$12,732</td>
<td>$13,112</td>
<td>$13,508</td>
<td>$63,712</td>
</tr>
<tr>
<td>Total</td>
<td>$26,000</td>
<td>$28,580</td>
<td>$29,420</td>
<td>$30,141</td>
<td>$31,520</td>
<td>$1,541,010</td>
</tr>
</tbody>
</table>

Enter the # Trainees

Choose the Role and enter Tuition/Fees, Stipends, Training Expenses, Travel and Other for each role

This page does not map to the SF424. See internal budget sample for help with calculations.
3.6 Subaward Costs

- **Add Institution(s) / (if applicable)**
  - Enter the direct and F&A costs associated with the Subaward.

You will upload detailed Subaward budget in SF424 (in SF424 applications)

Enter your Direct Cost and F&A Cost for your subaward

Chose an Institution for the Subaward. You have entered these in view 11.0 in the Funding Proposal

If you select MTDC as your F&A, you only list an institution under one listing (Even if more than 1 separate amount)
3.7 General Item Budget

- Update your General Costs (if applicable)
  - Add your cost items by clicking the add button
  - Selecting the Cost Type is important, please make sure you select the more appropriate item
  - Add a description (if needed), the unit cost and mark if this cost should be applied to the F&A
  - Under the specific year enter the # of units

All fields can be manually entered and overridden to get your desired general cost

Enter the # of Units

Choose an item to add a Cost Type, Description and Unit Cost
5.0 Budget Attachments

- Add your Budget Attachments
  - Attach any justifications that are required. Please see the FOA for guidelines for requirements.

Attach any additional attachments that are required for URA review. This page is geared to map to a Federal SF424.
Cumulative Budget Workspace

- Quick links to edit/view your budget in either your Funding Proposal or Budget workspace
  - No action is needed on your workspace. If you would like to access a portion of your budget, use the blue quick links.

Use blue links for quick budget section access
Creating an Alternate Budget