

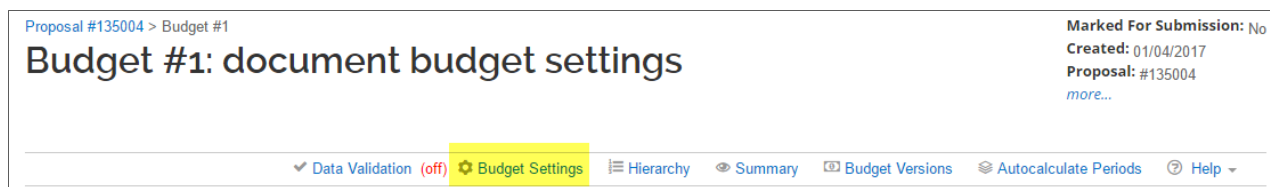
Overview:

Budget settings need to be changed to indicate when a budget is 'off campus', when the F&A rate type is other than MTDC, and to toggle complete/incomplete status. Can also be used to add comments for review purposes.

NOTE: A user needs full budget edit access to change settings and rates.

Procedure:

In an open Budget version, use the link in the top horizontal menu to open the **Budget Settings** lightbox:



Budget Settings

Project Start Date: 07/01/2017

Project End Date: 06/30/2020

Total Direct Cost Limit: 0.00

Budget Status: Incomplete

On/Off Campus: Default

Residual Funds: 0.00

Total Cost Limit: 0.00

Unrecovered F & A Rate Type: MTDC

F&A Rate Type: MTDC

Comments:

Modular Budget:

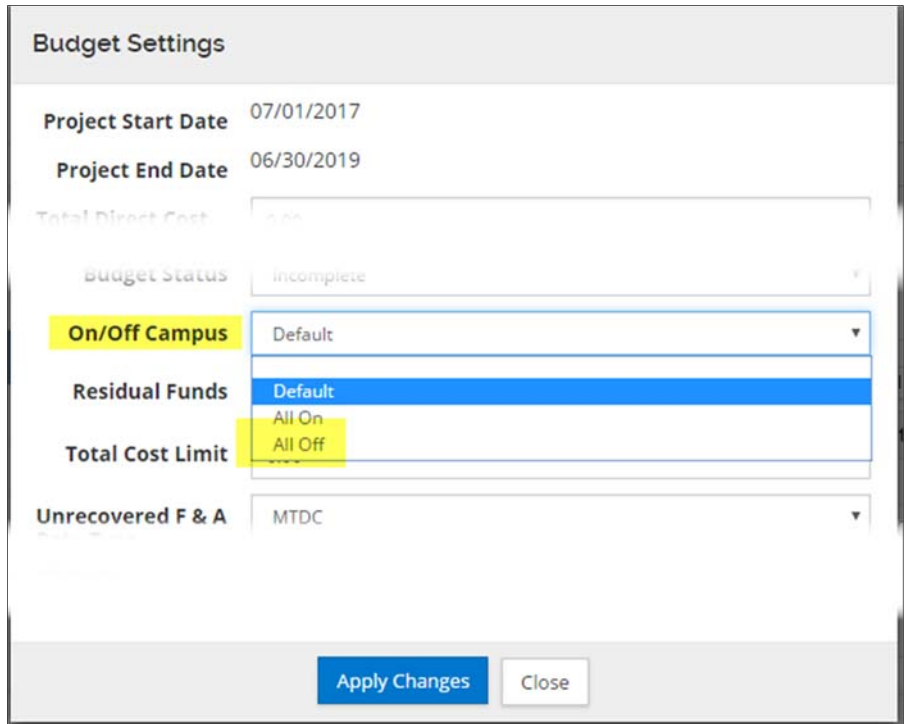
Submit Cost Sharing:

Apply Changes

| Setting | Description |
|---------------------------|---|
| Total Direct Cost Limit | Applies to the budget's DIRECT COSTS total. System generates a warning when exceeded. |
| Budget Status | Incomplete status allows editing. Complete should be used for the budget version to be reviewed/included in submission. No editing is allowed when a budget status is Complete. |
| On/Off Campus | Default is the same as on campus. Change to off-campus per University policy when applicable. |
| Residual Funds | Not being used at this time |
| Total Cost Limit | Applies to the entire budget total. System generates a warning when exceeded. |
| Unrecovered F&A Rate Type | Used for the system to calculate unrecovered indirect (when not using CSU's negotiated rates). |
| F&A Rate Type | Use to change the type applicable to the current budget: MTDC, TDC, S&W, or No Indirect Costs |
| Comments | Use to add helpful information for other viewers and reviewers. |
| Modular Budget | For NIH s2s proposal submissions, to indicate which budget form to be used. |
| Submit Cost Sharing | For s2s proposal submissions, when the budget form to be used requires cost-share information. Leaving it checked does not affect non-s2s submissions. |

On/Off Campus:

For an off-campus budget, use the **On/Off Campus** drop-down to select **All Off**. If the F&A Rate Type should still be MTDC, no other changes are needed.



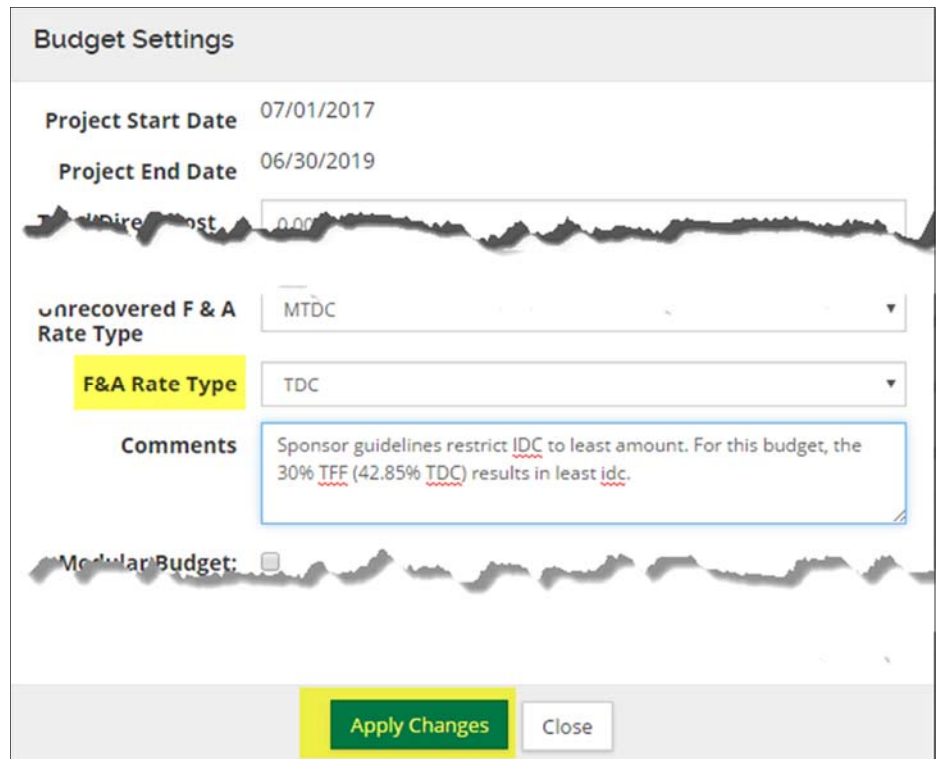
Budget Settings

Project Start Date: 07/01/2017
 Project End Date: 06/30/2019
 Total Direct Cost: 0.00
 Budget Status: Incomplete
On/Off Campus: Default
 Residual Funds: Default
 Total Cost Limit: All Off
 Unrecovered F & A: MTDC

Non-MTDC budget:

For a non-MTDC budget, in the **F&A Rate Type** dropdown menu (**not** the *Unrecovered Rate Type*), choose the appropriate rate type:

- TDC = Total Direct Costs (all direct cost expense items have F&A calculated on them)
- S&W = Only salaries & wages (Personnel line items) have indirect calculated
- No Indirect Cost = Sponsor restriction on indirect costs (*do not use* if a waiver of all indirect costs has been requested)



Budget Settings

Project Start Date: 07/01/2017
 Project End Date: 06/30/2019
 Total Direct Cost: 0.00
 Unrecovered F & A Rate Type: MTDC
F&A Rate Type: TDC
 Comments: Sponsor guidelines restrict IDC to least amount. For this budget, the 30% TFF (42.85% TDC) results in least idc.
 Modular Budget:

NOTE: A waiver of indirect costs should not be requested if a sponsor has *published* restrictions on indirect costs (either in a specific RFA/funding announcement, or in a policy guide that applies to all funding awarded by the sponsor).

If a waiver of all indirect costs has been approved, leave the F&A Rate Type field at either MTDC or TDC (based on the rate type the sponsor would allow), and edit the **Applicable Rate** (in the **Rates** section) to -0- (for MTDC), or leave at -0- (for TDC).

Complete/Incomplete:

For the budget review process, which should happen prior to routing, the PI or department/college research administrator should mark the budget version that is intended for submission as 'Complete'. This can be done with the Complete Budget button, the Actions dropdown menu for Budget in the Proposal section, or in the Budget Settings lightbox.

Marking a budget **Complete** is not a permanent action, but the only way to change a budget back to Incomplete is in the Budget Settings lightbox.

Use **Budget Settings** dropdown to change status:

Budget Settings

Project Start Date 07/01/2017

Project End Date 06/30/2019

Total Direct Cost Limit

Budget Status Incomplete ▾

Complete
Incomplete