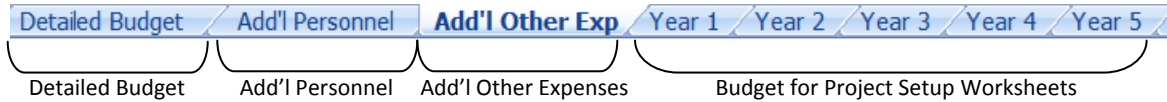


DIRECTIONS FOR THE DETAILED BUDGET TEMPLATE

The detailed budget template is a tool for UTHHealth investigators and departments to use in order to create an internal budget for proposals. This budget template will automatically feed into the Budget for Project Setup worksheet.

To use this form enter data only in the highlighted fields.

Components of the Workbook



There are 8 worksheets within this budget template. The main detailed budget template, worksheet to include additional personnel, additional other expenses, and the budget for project setup worksheets (Year 1 – Year 5)

Completing the Detailed Budget Worksheet

- 1) Enter the project information in the highlighted fields.

Principal Investigator: _____
 School/Department: _____

Sponsor: _____
 Project Period: _____

- 2) If applicable to the project, enter the annual inflation rate, indirect costs rate, and salary cap.

Annual inflation/Cost of Living Increase: 2%
 Indirect Cost Rate: 52%
 Salary Cap: 199,700

- 3) Enter personnel expenses for the project in categories: A. SENIOR/KEY PERSON and B. OTHER PERSONNEL. Section A has two subcategories: Faculty salaries and A&P salaries.
 - a. Enter the name, title, base salary, fringe benefit rate for each person. In year 1 specify the percent effort the person will contribute to the project. Years 2-5 will automatically populate.
 - b. To change the percent effort in subsequent years, enter the percent effort for that year in the highlighted field. Repeat this step for each person.

				Year 1
A. SENIOR/KEY PERSON				
Name	Title			
Faculty Salary		Percent Effort		0%
<i>Dr. Jane Doe</i>	PI	Base Salary	\$ -	-
		Requested Salary		-
		Fringe Rate	28%	-
		Total	\$	-

- 4) To add additional personnel to the project. Use the [Add'l Personnel](#) worksheet. Personnel entered on this worksheet will be factored in the overall budget on the main detailed budget worksheet, listed as *Senior/Key Person Total from Add'l Personnel*
- 5) Category C. EQUIPMENT is the first highlighted exemption. All exempt items are highlighted in red and are excluded from indirect costs (IDC). Examples of these items are tuition and fees, rental space, and utilities. To view all exclusions, please refer to UTHealth's current [F&A Rate Agreement](#) or [Institutional Data Sheet](#). Include the total amount for each equipment item in the highlighted fields for each applicable year.

C. EQUIPMENT (permanent unit items \$5,000 or more)	
#1	
#2	
TOTAL	\$ -

- 6) Complete the highlighted cells for sections D-F accordingly. Years 2-5 will automatically populate per your entry for year 1. Section F. OTHER DIRECT COSTS will include exceptions for patient care costs, tuition, and other exempt expenses. Include the total amount for each exempt expense item. The spreadsheet will automatically adjust your modified total direct costs (MTDC).
- 7) In the subcategory "Subcontracts", enter the total costs (direct and indirect costs) for each subcontract for each applicable year.

Subcontracts (Direct & Indirect Costs)		
Rice	100,000	100,000
MDACC	20,000	20,000
Subcontract #3 total costs		
Subcontract #4 total costs		
Subcontract #5 total costs		
Subtotal	\$ 120,000	\$ 120,000

- a. Enter the amount of the subcontract costs that should be excluded from UTHealth's IDC in the highlighted field with red font:

Rice	- Amount exempt from IDC	75,000	100,000
MDACC	- Amount exempt from IDC	0	15,000
Subcontract #3	- Amount exempt from IDC		
Subcontract #4	- Amount exempt from IDC		
Subtotal		\$ 75,000	\$ 115,000

UTHealth may collect IDC on the first \$25,000 in subcontract awards per subcontracted institution. The budgets for subcontracts in excess to \$25,000 are excluded from IDC.

- 8) To add additional supplies, equipment, subcontracts, etc. to the project use the [Add'l Other Exp.](#) worksheet. Expenses entered on this worksheet will be factored in the overall budget on the main detailed budget worksheet.

The worksheet will automatically calculate the totals for the project. If no exemptions are entered, the totals for the "Direct Costs", "Indirect Costs", and "Total Direct and Indirect Institutional Costs" for the project will be calculated. If exemptions are entered the total for the "Indirect Costs Base/Modified Total Direct Costs (MTDC)" will be calculated.