

## Directions for Project Setup Budget Form

### Budget for Project Setup (Single)

- 1) Complete the PI Name, FMS Project Number, and FMS Department ID with the appropriate information.
- 2) List all Key Personnel included in the Notice of Grant Award (NGA). If the NGA does not specifically list Key Personnel then only list the PI. Please include the agency approved effort for each of the key personnel.
- 3) Complete the budget for each applicable expense pool. Enter the IDC rate awarded in the green box next to 61015.
  - a. The rows highlighted in yellow are excluded from IDC

The first highlighted exemptions are items included in M&O. These items fall under account pool 61006 and are excluded from IDC. Examples of these items are *tuition and fees, rental space, and utilities*. The **total amount of M&O costs** (supplies, other, consultants) **should be included in the line for 61006. The 61006 total should include the IDC exempt total.** Enter total exempt from IDC in the **exempt (a)** box. This amount will be **excluded** from the **Modified Total Direct Cost (MTDC)**. Outline each item excluded from IDC in #3 under the Directions. If you need additional space please include the information in the Additional comments section.

M&O (supplies/other/consultants) 61006		-
(Tuition & Fees, Utilities, Rent) exempt (a)		-

The next items excluded from IDC are Equipment and Patient Care costs. The budget amount in these categories should match the approved detailed budget and the NGA.

Equipment	61009		-
Patient Care	61012		-

The final line excluded from IDC is subcontract budgets in excess of the first \$25,000. We earn 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. Enter the subcontract total that will earn IDC in the box **earning (1)**, and then enter the total excluded from IDC in the box **exempt (2)**. The total of the two lines will automatically show in the line for 61014. This is a protected cell, so you cannot change the total amount. List each subcontractor and total funded in #4 under Directions.

Subcontracts Total (line 1 and 2) 61014		-
(Subs earn IDC on 1st \$25,000 per institution) earning (1)		-
(S amt of subs in excess of \$25,000) exempt (2)		-

The lines for **Total DC, MTDC, IDC (61015)**, and **Total Award** are all protected cells. The cells are pre-loaded with formulas that will calculate each field according to the information provided in the previous lines.

**Total DC:** Total direct cost is a sum of the above outline cells.

**MTDC:** Modified total direct cost shows the total direct cost that will earn IDC. The items excluded are the boxes highlighted in yellow.

**IDC 61015:** This field will automatically calculate IDC by taking the percent entered in the green box and multiplying it by the MTDC.

**Total Award:** The sum of Total DC and IDC (61015).

- 4) The total award amount should match the total shown in the NGA.
- 5) Outline any additional comments for PAF or OSP in the lines provided. Do not add rows or columns to the worksheet as this will affect the established calculations.

#### **Budget for Project Setup (Multiple)**

- 1) Complete the PI Name, FMS Project Number, and FMS Department ID with the appropriate information.
- 2) List all Key Personnel included in the Notice of Grant Award (NGA). If the NGA does not specifically list Key Personnel then only list the PI. Please include the agency approved percent of effort for each of the key personnel.
- 3) For existing awards, please provide the FMS project number above each column. For new awards please provide the project description. (ex. Admin Core, Project 1, Project 2)
- 4) Complete the budget for each applicable expense pool. Enter the IDC rate awarded in the green box next to 61015. Follow the directions in the single project setup for IDC excluded items.
- 5) As mentioned above the **Total DC**, **MTDC**, **IDC 61015**, and **Total Award** boxes are protected formulas that will calculate based on the information provided in the previous boxes.
- 6) The cumulative total column will automatically calculate the sum of the project columns. The cells in the cumulative total are protected, so you cannot change the calculations.
- 7) The total award amount in the cumulative total should match the NGA.

#### **Budget for Project Setup (Differing IDC Rates)**

- 1) Complete the PI Name, FMS Project Number, and FMS Department ID with the appropriate information.
- 2) List all Key Personnel included in the Notice of Grant Award (NGA). If the NGA does not specifically list Key Personnel then only list the PI. Please include the agency approved percent of effort for each of the key personnel.
- 3) For existing awards, please provide the FMS project number above each column. For new awards please provide the project description. (ex. on campus/off campus)
- 4) Complete the budget for each applicable expense pool. Enter the IDC rate awarded in the green box next to each project. Follow the directions in the single project setup for IDC excluded items.
- 5) As mentioned above the **Total DC**, **MTDC**, **IDC 61015**, and **Total Award** boxes are protected formulas that will calculate based on the information provided in the previous boxes.
- 6) The cumulative total column will automatically sum the budget for projects. The cells in the cumulative total are protected, so you cannot change the calculations. The IDC amount will be the sum of the project totals.
- 7) The total award amount in the cumulative total should match the NGA.