

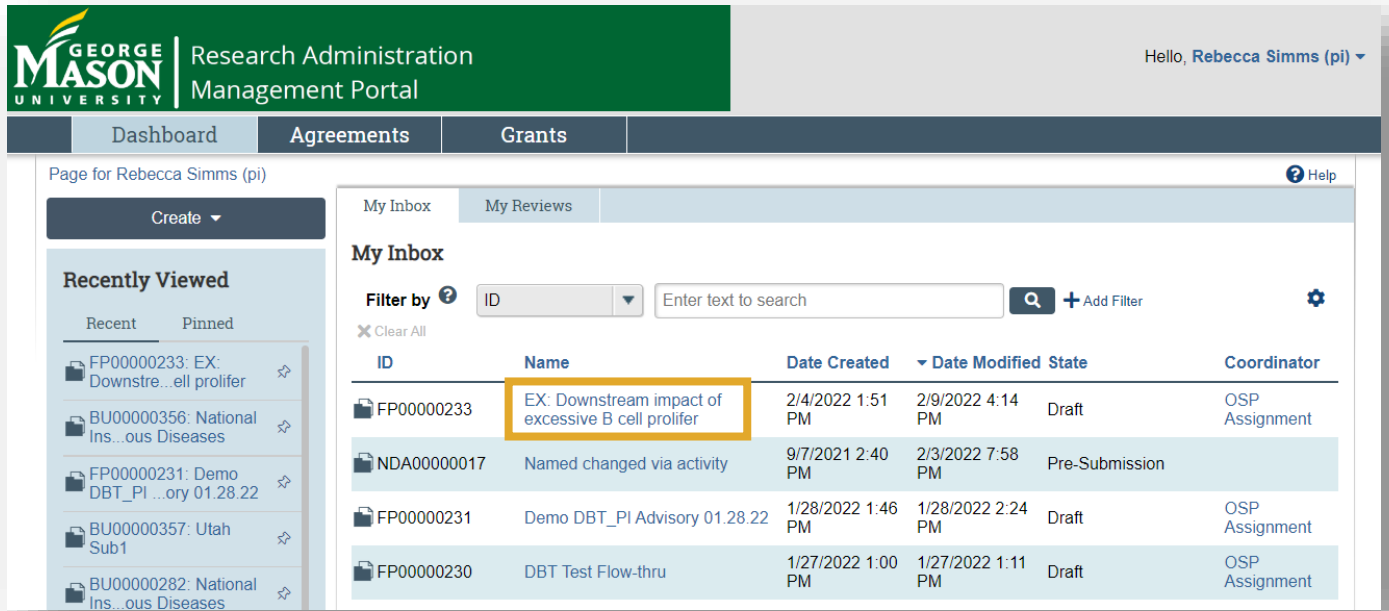
Create a Proposal Budget

Once you have completed the Funding Proposal (FP) SmartForms, you will need to enter your project budget prior to routing for review. Follow the steps below to assist you in the entry. For budgets that exceed 1.5M in any single budget year, contact OSP for additional procedures for approvals to submit to the sponsor.

Please refer to the excel [budget tool](#) for internal drafting.

STEP 1: Locate Budget within Proposal Record

- Access your record. You can do this from your Dashboard, by selecting the proposal title link.



Research Administration Management Portal

Dashboard | Agreements | Grants

Page for Rebecca Simms (pi)

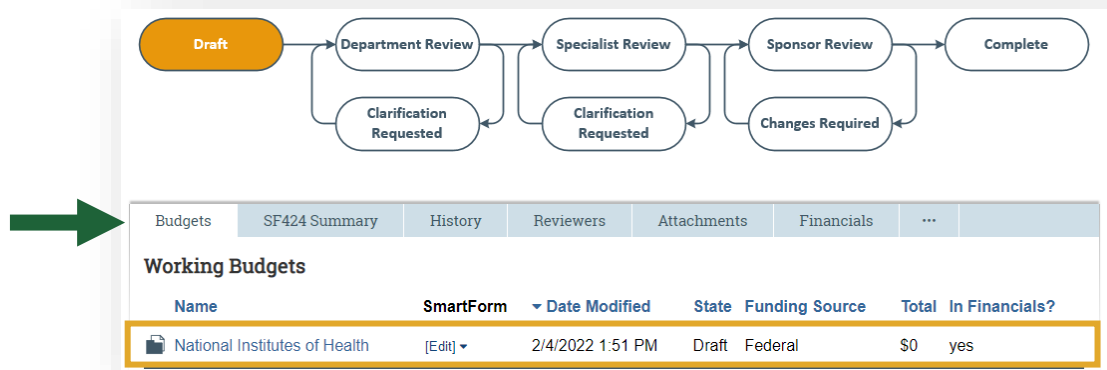
My Inbox | My Reviews

My Inbox

Filter by ID [Enter text to search] [Add Filter]

ID	Name	Date Created	Date Modified	State	Coordinator
FP00000233	EX: Downstream impact of excessive B cell prolifer	2/4/2022 1:51 PM	2/9/2022 4:14 PM	Draft	OSP Assignment
NDA00000017	Named changed via activity	9/7/2021 2:40 PM	2/3/2022 7:58 PM	Pre-Submission	
FP00000231	Demo DBT_PI Advisory 01.28.22	1/28/2022 1:46 PM	1/28/2022 2:24 PM	Draft	OSP Assignment
FP00000230	DBT Test Flow-thru	1/27/2022 1:00 PM	1/27/2022 1:11 PM	Draft	OSP Assignment

- Once you have selected your proposal, you can scroll to the budget tab pictured below where you will find the system generated default budget.



Draft → Department Review → Specialist Review → Sponsor Review → Complete

Clarification Requested (between Department and Specialist Review)

Clarification Requested (between Specialist and Sponsor Review)

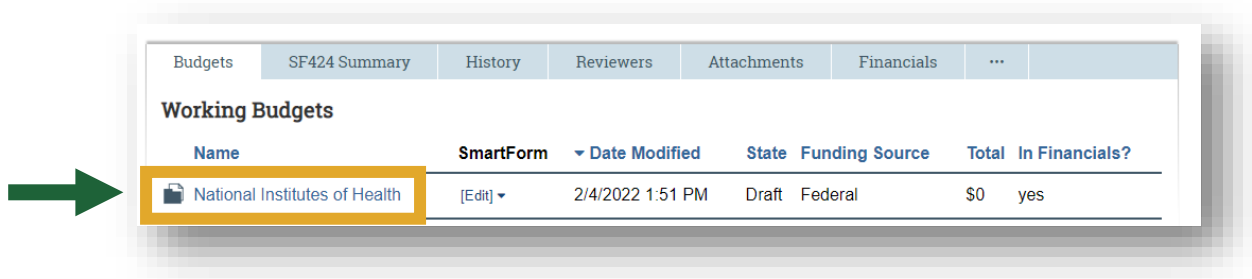
Changes Required (between Sponsor Review and Complete)

Budgets | SF424 Summary | History | Reviewers | Attachments | Financials | ...

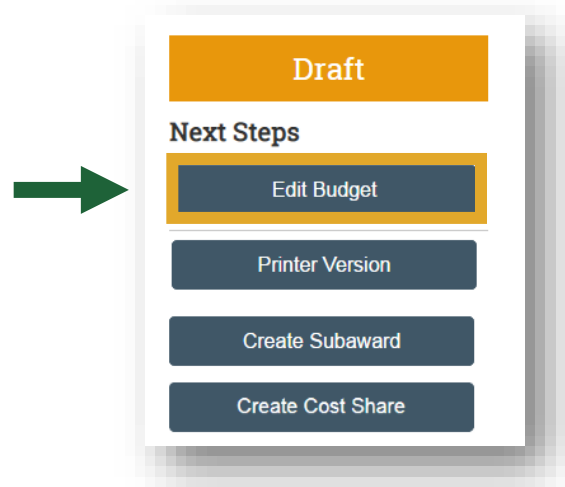
Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
National Institutes of Health	[Edit]	2/4/2022 1:51 PM	Draft	Federal	\$0	yes

- To begin filling out all budgetary SmartForms, select the budget name. This link will take you to the budget workspace.



- Select the **Edit Budget** button on the left-hand side of the screen.



STEP 2: General Budget Information

- Enter general information regarding your budget. Standard F&A cost base rates will auto-populate based on the primary purpose of this project selection provided on the Funding Proposal general information SmartForm.

General Budget Information

1. * Budget title: ?

2. * Principal Investigator for this budget:

3. * Does this budget use the standard F&A cost base and rates? ?
 Yes No [Clear](#)

Standard F&A cost base and rates						
F&A Cost Base	Period	1	2	3	4	5
	Start:	9/1/2022	9/1/2023	9/1/2024	9/1/2025	9/1/2026
	End:	8/31/2023	8/31/2024	8/31/2025	8/31/2026	8/31/2027
MTDC	Rate:	58.9%	58.9%	58.9%	58.9%	58.9%

Edit budget title here if needed.

The Principal Investigator will default but can be updated if needed.

Standard F&A rates will default based on the selected primary purpose and indirect cost rate type under General Proposal Information. Select **No** in question 3 to manually set the rates if the appropriate rate does not default. For example, Department of Defense (DOD) agencies have unique F&A rates.

- If response to field 3 is **No**, additional fields will populate where information regarding F&A can be specified.

Non-standard F&A cost base and rates

	Period 1	2	3	4	5	
F&A Cost Base	Start: 9/1/2022 End: 8/31/2023	9/1/2023 8/31/2024	9/1/2024 8/31/2025	9/1/2025 8/31/2026	9/1/2026 8/31/2027	
MTDC <input type="button" value="v"/>	Rate: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Clear"/>

From this drop-down menu, you can select a different cost base.

Once the rate is entered in the initial project period, you can use this arrow to carry the rate to the remaining periods.

- A table of current F&A rates can be found [here](#) along with the rate agreement.
- **IMPORTANT NOTES:**
 1. Any non-standard Modified Total Direct Cost (MTDC) base will need the “MTDC Indirect Cost Basis with Special Exclusions” tag added to the record (please refer to Step 3c below). The budget preparer can select which individual items or cost categories are/are not included in the indirect calculation within the general cost page as dictated by a sponsor’s specific indirect policy, but the tag is a record requirement to track this deviation.
 2. Mason will not be using the F&A Cost Base of: S&S, FEL or NIH Training Grant. Most commonly used will be MTDC, TDC or None.
- Below you will answer a series of questions pertaining to your budget. Carefully read the guidance in the callouts.

4. Will you require detailed budget tables for this budget submission?

* Travel: ?
 Yes No [Clear](#)

5. Include in consolidated budgets? ?

Yes No [Clear](#)

6. Salary cap: ?

Monthly salary cap:

This question determines whether:
 1. Costs are detailed in their own budget tables
 2. Costs are line items on the General Cost budget table

You can prepare multiple budget drafts for each proposal. This question determines which draft is included in your final submission.

This will automatically default to the annual cap based on sponsor. If the incorrect annual rate defaults, you can update the defaulted cap.

Disregard the Monthly Salary cap calculation for non-twelve-month employees

- If yes to **Field 7**, you will see the inflation rate automatically applied in the outyears. The inflation rate defaults based on settings, you can update the rate manually if needed below.


7. Enter inflation rates:

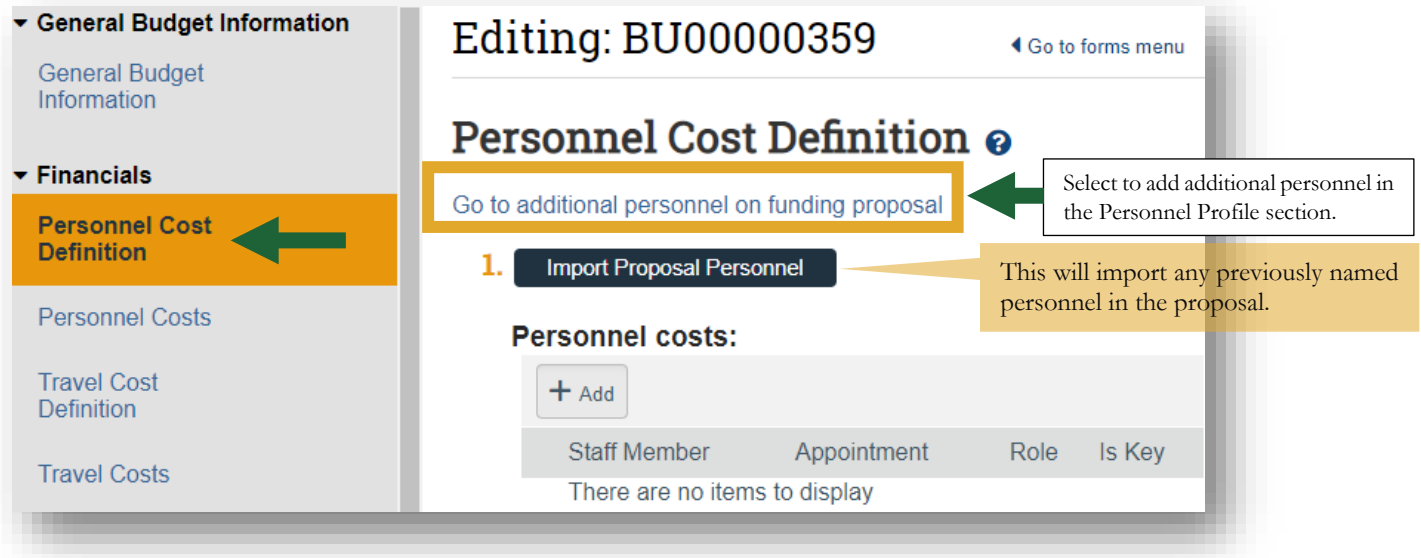
	Inflation Rate	Inflate Period 1
Personnel Cost:	<input type="text" value="5"/> %	<input type="checkbox"/>
General Cost:	<input type="text" value="5"/> %	<input type="checkbox"/>

Select these to apply the inflation rate within the first year.

STEP 3a: Personnel Cost Definition

This section allows you to identify all the personnel you will need to account for in the budget.

- Select **Import Proposal Personnel** to import GMU personnel that were included in the Personnel SmartForm completed prior to preparing the budget. Note that personnel that were labeled, “other significant contributor” will not be imported. The Personnel SmartForm is further explained in the **Initiate a Funding Proposal** guide.
- If you recognize personnel are missing from this drop-down list, select the **Go to additional personnel on funding proposal** and add them there. Using this method allows RAMP to auto-populate personnel salaries from Banner.
- Selecting  allows the user to choose TBD personnel from a drop-down list.



The screenshot shows the 'Personnel Cost Definition' page for editing budget BU00000359. The left sidebar has a navigation menu with 'Personnel Cost Definition' highlighted in orange and a green arrow pointing to it. The main content area has a yellow box around the link 'Go to additional personnel on funding proposal' with a green arrow pointing to it from a callout box that says 'Select to add additional personnel in the Personnel Profile section.' Below this is a numbered list starting with '1. Import Proposal Personnel' in a dark button, with a yellow callout box pointing to it that says 'This will import any previously named personnel in the proposal.' Underneath is a section titled 'Personnel costs:' with a '+ Add' button and a table with columns 'Staff Member', 'Appointment', 'Role', and 'Is Key'. The table currently shows 'There are no items to display'.

- RAMP allows users to enter varying effort levels between budget years per personnel entry. Each person entered as a personnel cost should be entered once for each appointment type.
- Review the fields on the Add Personnel Cost SmartForm and update as needed.

Add Personnel Cost

1. **Staff member:**

2. *** Role:**

If "Other (Specify)" selected, enter the role below:

3. *** Appointment:**

4. **Base salary applied:**

5. **Apply inflation rate:**
 Yes No [Clear](#)

2. *** Role:**

- Co-Investigator
- Co-PD/PI
- Faculty
- Graduate Student
- Post Doctoral
- Lab Technician
- Student Wage
- Classified Staff
- Non-Student Wage
- Administrative Faculty
- PD/PI
- Other (Specify)

If the individual was included in the Personnel SmartForm (reference the **Create a Funding Proposal Guide**), the appointment type may populate automatically.

This field will populate automatically from Banner for personnel included in the Personnel SmartForm, completed during initial FP setup. **The Base may need to be modified to match the appointment type (ie; for summer appointments, calculate the 3 month salary and insert here).** If faculty salaries exceed the sponsor cap for any appointment type, replace the Base salary applied with the sponsor salary cap amount. Over-the-cap salaries will not be captured in RAMP at proposal time, however proposals where a salary caps was used, will be tagged.

- When selecting the role of Graduate Student, use the “Other” field under “Role” to type in if the GRA is a Master or PhD student.
- If applying the 5% inflation rate, when the first budget period duration is less than 12-months, the system will prorate the applied inflation rate. In instances where the first budget period is less than 12 months, it is recommended that the inflated salary in the following budget period is entered manually in the Personnel Costs Base Field which can only be modified by selecting **No** for **Apply inflation rate** for the individuals.
- Graduate and student wage support costs and benefit rates can be found on the [OSP website](#). Graduate student stipends and Undergraduate hourly wages should be listed as TBD in the Personnel Cost Definition. For student wage, you may take the hourly rate and annualize for the base salary, then assign a percentage of effort or you may take the budgeted amount for the position as the base salary and assign 100% effort in the Personnel Costs section. Other student support costs should be entered in the General Cost section.
- For faculty with salaries over the sponsor cap, we will use the corresponding appointment type sponsor cap in the **Base salary applied** field above.
 See example below for Calculating Academic and Summer Salary Caps:

$$\$203,700 \text{ (Annual Salary Cap)} \times 0.75 = \$152,775 \text{ Academic Salary Cap (9 months)}$$

$$\$203,700 \text{ (Annual Salary Cap)} \times 0.25 = \$50,925 \text{ Summer Salary Cap (3 months)}$$

IMPORTANT NOTE: Budget Justifications must reflect the FULL Institutional Base Salary for all Personnel over the salary cap.

- Use the [budget tool](#) to calculate **Base salary applied** for a summer appointment type and follow the instructions below.

STEP 3b: Faculty Proposing Summer Effort

- Review the GMU policy on [Faculty Summer Salaries](#) and the [fringe benefit rates](#).
- When faculty propose both Academic and Summer effort on a FP, each appointment type will be entered within the Personnel Cost Definition section of the budget individually, refer to the example below.

1. Personnel costs:

	Staff Member	Appointment	Role	Is Key
<input type="button" value="+ Add"/>				
<input type="button" value="Update"/>	Rebecca Simms (pi)	3 months	PD/PI	yes <input type="button" value="✕"/>
<input type="button" value="Update"/>	Rebecca Simms (pi)	9 months	PD/PI	yes <input type="button" value="✕"/>

- To calculate summer salary, use the [budget tool](#) or the example below:

$$\frac{\$187,500 \text{ (9 month salary)}}{3} = \$62,500 \text{ summer salary}$$

STEP 3c: Tag the FP

- Funding Proposals where a sponsor salary cap was used as the Institutional Base Salary, will need to be tagged in RAMP. Additionally, any non-standard Modified Total Direct Cost (MTDC) base will need the “MTDC Indirect Cost Basis with Special Exclusions” tag. Navigate to the left side of the FP workspace and select **Manage Tags**.



- Next, select the toggle within the pop-up window. This action will bring you to another pop-up window where you can select the tag “Salary Cap” or “MTDC Indirect Cost Basis with Special Exclusions.”

Manage Tags

1. Associate tags:

There are no items to display

STEP 4: Personnel Costs

To apply costs to your personnel or make updates to the default select **Edit** for the table below to appear.

- ▼ Financials
 - Personnel Cost Definition
 - Personnel Costs ←
 - General Cost Definition
 - General Costs
 - F&A Cost Overrides
- ▼ Attachments

Personnel Total:	\$48,730.00	\$48,730.00	
Direct Total:	\$48,730.00	\$48,730.00	
Indirect Total:	\$0.00	\$0.00	
Grand Total:	\$48,730.00	\$48,730.00	

Personnel Costs

Save

Person: Faye Taxman
Role: PD/PI

Period: Period 1
Start: 1/1/2025
End: 8/31/2025
Duration: 8.00

Effort: %

Sal Req: %

FB Rate: %

Annualized Sal: \$370,081.00

Monthly Rate: \$30,840.08

Disregard the Monthly Salary cap, Annualized Sal & Monthly Rate calculations for non-twelve-month employees

Important tips and considerations for completing the budget:

- In this section you should enter both the Effort and Salary Requested. Effort represents the % of time the individual expects to contribute during a given period. The Salary Requested represents the % of time that is anticipated to be funded by the sponsor. Generally, the percent effort and percent salary requested will be the same. In instances of cost-shared salary, the salary requested may be less than the overall effort.
- The base salary included in the Personnel Cost Definition will populate automatically in the fields below.
- If an escalation needs to be added, select the personnel and select **Yes** for inflation rate. If you need to remove inflation, select the personnel and select **No** for inflation rate. Then select “Edit” and then select the arrow to the right of the base salary in period one to remove the inflation for all periods of the budget.
- If generating SF424 SmartForms, all person months will appear in the calendar months column. For 9- and 3-month appointment, Person Months populated in the Calendar Month column must be moved to the respective appointment type column.
- The fringe and benefit rate applied will default to the research faculty rate. Within this section you will have the opportunity to adjust this rate. Please refer to our [website](#) for the most up to date fringe benefit rates.
- Once you have entered this information, select save which will prompt the page to refresh. Here you can see the calculations based on the entries.

Budget Summary

	Period 1	Period 2	Period 3	Period 4
Period:	Period 1	Period 2	Period 3	Period 4
Start:	1/1/2025	7/1/2025	7/1/2026	7/1/2027
End:	6/30/2025	6/30/2026	6/30/2027	6/30/2028
Duration:	6.00	12.00	12.00	12.00
Personnel Total:	\$185,542.00	\$186,507.00	\$190,020.00	\$193,642.00
Direct Total:	\$185,542.00	\$186,507.00	\$190,020.00	\$193,642.00
Indirect Total:	\$92,771.00	\$93,254.00	\$95,010.00	\$96,821.00
Grand Total:	\$278,313.00	\$279,761.00	\$285,030.00	\$290,463.00

Personnel Costs

	Period 1	Period 2	Period 3
Edit Show Effort	Period: Period 1	Period: Period 2	Period: Period 3
	Start: 1/1/2025	Start: 7/1/2025	Start: 7/1/2026
	End: 6/30/2025	End: 6/30/2026	End: 6/30/2027
	Duration: 6.00	Duration: 12.00	Duration: 12.00
Person: Rebecca Simms (pi)	Salary: \$36,000.00	Salary: \$37,080.00	Salary: \$38,192.00
Role: PD/PI	Benefits: \$11,448.00	Benefits: \$9,270.00	Benefits: \$9,548.00
	Total: \$47,448.00	Total: \$46,350.00	Total: \$47,740.00

STEP 5: Travel Cost Definition

- If the detailed travel grid is selected on the General Budget Information SmartForm, add planned travel costs (See example below).

1. Travel costs:

+ Add

	Description of Travel	Is Foreign Travel	Base Cost	
Update	Conference A (registration, airfare, lodging, per diem)	no	\$500.00	✕
Update	Conference B (registration, airfare, lodging, per diem)	no	\$1,500.00	✕
Update	Conference C (registration, airfare, lodging, per diem)	no	\$500.00	✕

STEP 6: Travel Costs

- In this section you can provide specifics for each budget period by selecting **Show Quantity**, which will bring you to the following screen where the total number of trips and the number of people per trip can be entered.

Show Totals		Period 1 9/1/2022 8/31/2023	Period 2 9/1/2023 8/31/2024	Period 3 9/1/2024 8/31/2025	Period 4 9/1/2025 8/31/2026	Period 5 9/1/2026 8/31/2027
Description: Conference A (registration, ai...	# Trips:	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	# People per Trip:	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Description: Conference B (registration, ai...	# Trips:	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	# People per Trip:	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Description: Conference C (registration, ai...	# Trips:	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	# People per Trip:	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Domestic Travel Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Foreign Travel Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Cost Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

STEP 7: General Cost Definition

- The General Cost section will be used to identify any additional category.
- To do so, select **Add** to list of cost types by category.

1. * General cost type:

2. Cost:

3. Description:

- * General cost type:**
- Animal
 - Consultant Services
 - Equipment
 - Equipment or Facility Rental/User Fees
 - Externally Funded Fellowship
 - Graduate Student Health Insurance
 - Institutional Allowance Fellowship
 - Mandatory Student Fees
 - Materials and Supplies
 - Other
 - Patient Care
 - Publication Costs
 - Research Subject Payments
 - Trainee: Other
 - Trainee: Stipend
 - Trainee: Subsistence
 - Trainee: Travel
 - Trainee: Tuition
 - Travel: Domestic
 - Travel: Foreign

4. Apply inflation?

Yes No [Clear](#)

5. Include in indirect calculations?

Yes No [Clear](#)

Use this field to specify the selected General Cost Type. Detailed cost calculations for costs like tuition, mandatory fees, and SGHI must be included in this field and should indicate if the costs are in or out-of-state. Other examples of when calculations must be included would be; animal purchase and care costs, core service fees, etc.

Select no if costs vary between years. Otherwise the system will auto-calculate based on the value entered in question 2.

Notice that this field appears on cost categories that are classified as F&A bearing. Update as appropriate based on sponsor and institutional policy.

➤ **IMPORTANT NOTES:**

- If applying inflation (yes to field 4) the system assumes that the base cost remains the same in the out year and will calculate them based on the included rate. You will need to select no to inflation if your base costs change in subsequent years.
- Avoid using “Other” to ensure proper budget mapping between RAMP and Banner.
- Only choose equipment if the equipment costs are greater than \$5K. Equipment under \$5K is classified as a Materials and Supplies cost type
- For Participant Support in RAMP, use the Trainee type.
- Mason will not be using “Patient Care” as a type
- Externally Funded Fellowship and Institutional Allowance Fellowship may need to be entered in an internal budget so that these figures do not transfer upon submission.

➤ Within this section, you will be able to manually adjust costs for all budget periods.

	Period 1 9/1/2022 8/31/2023	Period 2 9/1/2023 8/31/2024	Period 3 9/1/2024 8/31/2025	Period 4 9/1/2025 8/31/2026	Period 5 9/1/2026 8/31/2027
Cost Type: Animal Description: Purchase and housing for 30 mice	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
Cost Type: Equipment Description: -80 freezer	\$6,000.00	\$6,000.00	\$6,000.00	\$6,000.00	\$6,000.00
Cost Type: Materials and Supplies Description: ELISA kit, pipette tips, analyzers, ch	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00
Cost Type: Publication Costs Description: Open access fees per 1 article	\$500.00	\$500.00	\$500.00	\$500.00	\$500.00
General Cost Total:	\$41,500.00	\$41,500.00	\$41,500.00	\$41,500.00	\$41,500.00

STEP 9: F&A Cost Overrides

➤ If any F&A cost overrides are needed (ie; F&A waivers and imposed sponsor limits), contact your OSP Specialist. OSP personnel will have the access to make this change and you will be able to see it here.

- 1. F&A cost base:**
MTDC
- 2. * Personnel salary:**
No override
- 3. * Personnel benefits:**
No override
- 4. * Travel:**
No override
- 5. * General cost:**
No override

STEP 10: Attachments

➤ In this section, please attach the external budget tool (if used) and [budget justification](#).

1. Attachments: ?

+ Add

Name

There are no items to display

Submit a Document

Title:

If not provided, the name of the file will be used

* File:

* Required

STEP 11: Export Budget (Optional)

- RAMP allows users to export the FP budget as an excel file. To do so, navigate to the FP workspace and select Export Budget on the left side of the screen.

The screenshot shows the RAMP interface. On the left sidebar, the 'Export Budget' option is highlighted with a yellow box. The main content area displays the 'Working Budgets' table with the 'History' tab selected. The table has columns for Name, SmartForm, Date Modified, and State. A row is visible for 'National Institute on Drug Abuse' with a date of 4/21/2022 1:54 PM and a state of Draft.

- After selecting **Export Budget**, select the **History Tab** to find the excel version of the budget.

The screenshot shows the 'History' tab selected in the RAMP interface. The 'Exported Budget' activity is highlighted with a yellow box. The activity details show the author as 'Simms (pi), Rebecca' and the activity date as '5/4/2022 1:42 PM'. The file name is 'Budget Spreadsheet_EX: Downstream impact of excessive B cell prolifer'.

NEXT STEPS

- You have completed the budget SmartForm. You can now view this budget in the Financials tab of the proposal workspace.

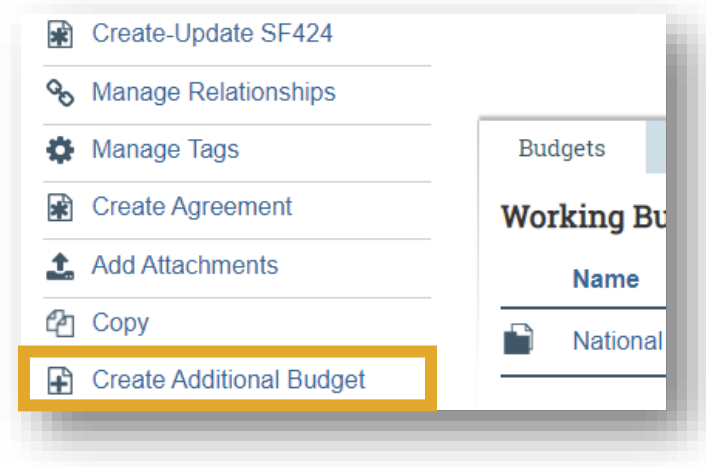
The flowchart illustrates the budget review process: Draft (orange oval) leads to Department Review (white oval), which can lead to Specialist Review (white oval) or Clarification Requested (white oval). Specialist Review can lead to Sponsor Review (white oval) or Clarification Requested. Sponsor Review can lead to Complete (white oval) or Changes Required (white oval). Changes Required leads back to Sponsor Review. Clarification Requested leads back to the previous review stage.

Below the flowchart is a screenshot of the 'Financials' tab showing a table with personnel costs across five periods.

Current All-Period Totals	Period 1	Period 2	Period 3	Period 4	Period 5	Cumulative
Personnel:	\$33,316	\$26,360	\$26,360	\$26,360	\$26,360	\$138,756

- If needed, you may create another budget, create a cost-share budget or create a subaward budget.

- RAMP also provides users the option to create draft budgets. Creating an additional budget draft can be done from the main proposal workspace. A budget may not be deleted after it is created. Draft budgets that are not to be included in the proposal submission, should have their title changed to **VOID** before submitting for review.



- To create a subaward or cost-share budget, refer to the **Cost-share** and **Create a Subaward Budget Guides**.