Scenario:

You are submitting an R01 proposal to the National Cancer Institute (NCI) for a 3 year Project Period. You have prepared a Budget Version 1 based on the original information from the PI however, upon further development, the PI has decided to change some attributes of the Budget.

The PI wants you to make the following changes to the Proposal/Budget:

- The Project Period should now to be 04/01/2015 - 03/31/2018
- A Subcontract from Miriam Hospital has been added with Laura Stroud as the Sub-PI
- A Co-Investigator (Mary West) has been added at 10% effort. This Co-I also happens to have a salary above the NIH Cap
- A Post-doc has also been added at 100% effort in each project period
- In addition, travel should inflate 3% annually
- Finally, the PI would like to see the final budget in a detailed and a modular budget format

To Begin:

- Select the Proposal titled – MAKE A COPY FOR THE Advanced Budgeting Class (*2903) – and make a copy of it.

Lesson 1 – Proposal and Budget Updates

**Exercise 1 – Change the Proposal Start & End Date**
- Proposal Tab – Start Date 04/01/2015; End Date 03/31/2018
- Check the Subcontract Checkbox

**Exercise 2 – Add Individuals to the Investigator Tab & Key Person Tab**
- Add Miriam Hospital to the Organization Tab – Other Organization
- Add Mary West to Investigator Tab with 10% effort
- Add Stroud, Laura (Rolodex) to Key Person Tab with Role of Subcontract PI

**Exercise 3 – Copy Budget Verion – Period 1 Only**

**Exercise 4 – Adjust Budget Start & End Date**
- Adjust Start & End Date on Budget Summary Tab
- Adjust Period Boundaries:
  - 04/01/2015 – 03/31/2016
  - 04/01/2016 – 03/31/2017
  - 04/01/2017 – 03/31/2018
- Sync Proposal Rate Question – answer ‘yes’
- Adjust Start and End Date of Personnel Budget Details for Quinn & Moore
  (The dates will shift whenever you adjust your budget periods)

**Exercise 5 – Adjust Rates: Organized Researc, On-Campus, Full F&A**
- Change Inflation Rate for Travel category to 3%

**Exercise 6 – Modify & Complete the Budget Persons Window for the added Co-Investigator and Post Doc**
- Add Szulc, Katarzyna; complete fields as follows:
  - Base Salary - $210,000
  - 10 Month Appointment
  - **Effective Date – 07/01/2015**
  - Base Salary by Period Fields – $181,500
Lesson 2 – Entering Additional Period 1 Line Items

Exercise 1 – Review/Complete NIH Cap Worksheet

Exercise 2 – Enter Personnel Cost Elements

<table>
<thead>
<tr>
<th>Cost Element</th>
<th>Person</th>
<th>% Charged</th>
<th>% Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>A121070: Faculty Salary – NIHCAP-Academic/Year</td>
<td>Szulc, Katarzyna</td>
<td>*review NIH Cap Worksheet</td>
<td>10.00</td>
</tr>
<tr>
<td>A091061 – Post Doc (Non-Senior) – Anniversary Inflation</td>
<td>TBA – Post Doc 1</td>
<td>100.00</td>
<td>100.00</td>
</tr>
</tbody>
</table>

Lesson 3 – Generating Remaining Budget Periods

Lesson 4 – Modifying the Budget

Exercise 1 – Edit Line Items
- Update NIHCAP %Charged in Period 2 & 3
- Add Cost Sharing to Equipment line item in year 2

Lesson 5 – Entering Subaward Information

Exercise 1 – Upload Subaward Budget in the Subaward Budget Section Review Budget line items

Lesson 6 – Direct Cost Limit

Exercise 1 – Set Direct Cost Limit in each Project Period ($250,000)

Exercise 2 – Sync to Direct Cost Limit in each Project Period

Lesson 7 – Modular Budget

Exercise 1 – Create Modular Budget

Lesson 8 – Cost Sharing

Exercise 1 – Option to ‘Submit Cost Sharing’ to Sponsor Complete Cost Sharing Questionnaires

Lesson 10 – Print

Exercise 1 – Brown Custom Forms

Exercise 2 – Grants.gov Forms: RR Budget, Modular Budget, Subaward Budget