Coeus Budgeting Basics – Premium

KEY CONCEPTS
Agenda

• Proposal Scenario
• Starting the Budget
• Rates
• Budget Persons Window
• Entering Personnel Line Items
• Entering Non-Personnel Line Items
• Generating Budget Periods
• Modifying the Budget
• Budget Versions
• Finalize the Budget / Validations
• Budget Justification
• Printing
You are submitting an R01 proposal to the National Cancer Institute for a 3 year Budget Period (9/01/2016 – 08/31/2019)

<table>
<thead>
<tr>
<th>Personnel Line Items:</th>
<th>Non-Personnel Line Items:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• PI (Quinn) will work both the academic and summer months on this proposal</td>
<td>• Equipment</td>
</tr>
<tr>
<td>• Co-Investigator (Moore) will also work both the academic and summer months on this proposal</td>
<td>• Travel</td>
</tr>
<tr>
<td>• 1 Statistician (Carroll) – 10% effort per year</td>
<td>• Supplies</td>
</tr>
<tr>
<td>• 1 Grad R/A – TBA</td>
<td>• Grad Tuition</td>
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<td></td>
<td>• Grad Health Fee</td>
</tr>
<tr>
<td></td>
<td>• Subcontract to Miriam</td>
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</tbody>
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Overview of the Budget Process

CREATE A NEW BUDGET

- Enter Information in Summary Tab
- Verify Rates
- Create Budget Persons List

ADD DETAILS FOR THE FIRST YEAR

Personnel Line Items

- Select Costs Elements
- Add Persons
- Enter Details

Non-Personnel Line Items (Supplies, Equipment and Other Items)

- Select Cost Elements
- Enter Details
Budget Process Con’t

- Generating Remaining Budget Periods with Inflation
  - Inflation rate determines the amount the cost increases in the following years.

  - Modify an Existing Budget
    - Add Line Items
    - Delete Line Items
    - Modify Cost Details
    - Adjust Limits and Sync

- Print a Summary Report

- Finalize the Budget
Proposal Rates

- Coeus stores various university approved rates that are needed for budget development:
  - F&A (Facilities and Administrative)
  - EB (Employee Benefits)
  - Inflation

- Rates are set for each fiscal year and Rates are applied to cost elements within the budget.

- To be sure that your proposal is using the most up-to-date indirect, employee benefit, and inflation rates; you must synchronize (Sync) your Proposal Rates table to the University Rates table. If you are using a copied proposal, this action is imperative.
The **Budget Persons window** stores the information Coeus needs to calculate SALARY.

The **Budget Persons window** can be thought of as a "shopping list of personnel"
- includes salary and appointment information. Coeus will inflate for annual salary increases and then calculate direct and indirect costs based on the dates of performance and % of Effort.

You will add all **Named Personnel** in the proposal to this window.
- Any **Investigators**, added to the | **Investigators Tab** |
- Any **Key Personnel**, added to the | **Key Persons Tab** | will automatically populate the Budget Persons Window when your budget is first created.
You can add additional personnel as necessary at any point in the budget development process. All budgeted project personnel should be included.

*Some participants do not need to be named.* The TBA placeholders are used to include them in the budget.

Personnel in this list are included in the budget *only* when added to line items.

- They do not become part of the budget just by adding them to the Budget Persons window, so you can add anyone you think might be needed at some point in the project.
Coeus uses the **Appointment Type**, **Effective Date**, and **Calc Base fields** to determine an individual’s salary.

For example, if you enter a base salary of $100,000 for an individual with a 10 Month appointment; salary calculations will be based on $10,000 per month.
Cost Element / Subcode / Spend Category List

- [link](www.brown.edu/research/sites/brown.edu.research/files/uploads/Coeus_CostElements_Subcodes_451P2x_May2014.xlsx)
Entering Personnel Line Items

- Personnel Line Items (or Personnel Cost Elements) within a budget describe who will be paid out of the award funded to the proposal.

- Coeus allows you to add named persons (Investigators, Key Persons) as well as persons to be named/funded (TBA Postdocs, TBA Graduate Research Assistants, etc.) if the proposal is funded.
Adding Personnel to the budget involves two steps:

1. Select the Salary Line Item (Cost Element/Sub Code).

2. Add the Personnel Budget Details for the salary Line Item (Cost Element/Sub Code).
Set the appropriate Start Date and End Date fields

• The **Start Date** and **End Date** for the selected personnel default to the Start / End Date of the proposal period.

• These dates should be adjusted to accurately reflect the appointment period / academic or summer months that are being worked on the project for each individual.

• **Note** – These dates are crucial for accurately calculating personnel salary in Coeus.
Generate All Budget Periods

- Once all of your Budget Line Items (Cost Elements) are added to the Period 1 budget, Coeus has a function to generate the remaining budget periods.

- The budget line items are duplicated into each period and inflation is applied, if applicable, to the line items within each budget period.

*Note - The Generating all Periods function can be done only once per budget version. Before you generate the remaining budget periods, you should review the Period 1 budget for accuracy.
Printing Budget Forms

- There are several forms that can be printed from the Budget tool itself for easy review.
- Budget Forms
  - Budget Summary Total (all periods, cost elements & total)
  - Budget Summary by Period (detailed break down by period)
  - Grants.gov Budget form
Agenda for Advanced Budgeting Class

- Modifying Proposal Start & End Dates
- Adjust Budget Dates/Adjust Period Boundaries
- Modifying Rates
- Budget Persons Update – Anniversary Date
- Cost Sharing/NIHCAP
- Upload Sub budgets
- Creating Modular Budgets
- Sync line items to Direct Cost Limit