

Proposals must be completed and routed seven (7) business days before the deadline for OSP to submit the proposal.

Creating a Detailed Budget

The GeauxGrants Budget tab replaces the need to separately complete an excel spreadsheet for your proposal. The budget will automatically calculate salary, fringe benefits, tuition remission and indirect costs. You can also export the budget to excel or to the Grants.gov budget PDF.

These instructions must be followed unless the sponsor has a required budget template that must be used. When sponsor has a required budget template follow instructions for [Creating a Simplified Budget](#).

Budget Tips

- The Budget tab will open in a new window. Clicking Done will close just the budget screen and return user to Proposal Development record.
- It is recommended that you enter budget as a whole instead of by each budget period.
- The Budget Summary will summarize the total costs of the entire institution budget.
- Other sections on the screen include Personnel Costs, Non-Personnel Costs, Subawards, and Subprojects.
- Only upload a separate budget when the sponsor has a required budget template.
- If the budget period is not a full twelve month period or does not start on the first of the month, we recommend following the steps for [Manually Overriding an Appointment in the Budget](#) for named personnel. Failure to remove the Salary appointment can cause incorrect calculations due to the system calculating at a daily rate instead of the normal monthly.

Budget – Named Personnel

- **Step 1:** The PI of the proposal will automatically appear under the Personnel section. To enter other Personnel, begin typing last name, first name and then choose from list. Select Type & Role from dropdown options and click Add Person.

NAME	Progressive Text	Key or Non-Key	Role on Project	PERIOD 1	PERIOD 2	DIRECT COSTS
Detail Tiger, (L14) Mike PD/PI				\$ 28,800	\$ 29,376	\$ 58,176
Subtotal Personnel:				\$ 28,800	\$ 29,376	\$ 58,176

Louisiana State University | Add New Profile | Begin typing to select Personnel Name... | -- Select Type -- | -- Select Role -- | Add Person

- **Step 2:** Click Detail button by person's name to make edits to their salary and effort. All LSU appointments will be loaded from Workday. This Mike the Tiger has a Calendar appointment; therefore, GeauxGrants will only allow Calendar months to be entered.
- **Step 3:** On the Detail popup, enter the requested person months.
 - **Step 3a:** Click Save and Close and fringe benefits will automatically be calculated based on personnel type. If you are adding a named Graduate Assistant, see separate user guide for [Budgeting for Graduate Assistants – Named](#)

Budget Detail for: Tiger, (L17) Mike

Detail Appointments Justifications Cost Sharing Effort Periods

Save and Close Save Close

Costs by Budget Period Person Months Show Calculation Details

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY		FRINGE BENEFITS	TOTAL	MANUAL*
1	PD/PI	75,000	1.00	0.00	0.00	6,250	Employee	2,500	\$ 8,750	<input type="checkbox"/>
2	PD/PI	75,000	1.00	0.00	0.00	6,250	Employee	2,500	8,750	<input type="checkbox"/>
Total						\$ 12,500		\$ 5,000	\$ 17,500	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

- **Step 3b:** Choose Effort from dropdown list if sponsor requests salaries in percent effort instead of person months.

Budget Detail for: Tiger, (L17) Mike

Detail Appointments Justifications Cost Sharing Effort Periods

Save and Close Save Close

Costs by Budget Period Effort Show Calculation Details

PERIOD	ROLE	BASE SALARY	EFFORT	SALARY		FRINGE BENEFITS	TOTAL	MANUAL*
1	PD/PI	75,000	8.333	6,250	Employee	2,500	\$ 8,750	<input type="checkbox"/>
2	PD/PI	75,000	8.333	6,250	Employee	2,500	8,750	<input type="checkbox"/>
Total				\$ 12,500		\$ 5,000	\$ 17,500	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

- **Step 4:** Click Appointments tab, to select a percent to calculate inflation in the out years. GeauxGrants will automatically calculate this inflation on the Detail tab. Enter inflation and click Save. *Note: Appointments dates are for calculation purposes only. Workday is the official system for all employee appointment dates.*

Budget Detail for: Tiger, (L17) Mike

Detail **Appointments** Justifications Cost Sharing Effort Periods

Save and Close Save Close

Salary/Payroll Information Refresh From Profile Add Appointment

APPOINTMENT	APPOINTMENT START/END	BASE SALARY	FRINGE BENEFITS	NET SALARY	DELETE
Type: Calendar Months: 12 Continue <input checked="" type="radio"/> Recycle <input type="radio"/> End <input type="radio"/> Annual Inflation 2% <input type="checkbox"/> Apply inflation on the Primary Appointment Anniversary Date	S: 01-Jan-2019 E: 31-Dec-2019	75,000 Per Appt	Employee Amount: 33,000	108,000	X
Total:				108,000	

Budget Detail for: Tiger, (L17) Mike

Detail **Appointments** Justifications Cost Sharing Effort Periods

Save and Close Save Close

Costs by Budget Period Person Months Show Calculation Details

PERIOD	ROLE	BASE SALARY	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL	MANUAL*
1	PD/PI	75,000	2.00	0.00	0.00	12,500	5,125	\$ 17,625	<input type="checkbox"/>
2	PD/PI	76,500	2.00	0.00	0.00	12,750	5,228	17,978	<input type="checkbox"/>
Total						\$ 25,250	\$ 10,353	\$ 35,603	

**Click Save to calculate salary and fringe benefits. This is required because appointment data is being used.
*Increments marked manual will ignore defined appointments for purposes of calculations.

- **Step 5:** Click Save and Close once information has been entered.



Note: Personnel direct costs on Budget Detail includes both requested salary and fringe benefits.

Personnel [Hide]

NAME	PERIOD 1	PERIOD 2	DIRECT COSTS
Key Personnel			
Detail Tiger, (L17) Mike PD/PI	\$ 8,750	\$ 8,750	\$ 17,500

Budget – Unnamed Personnel

To add an unnamed position or To Be Hired (TBH), follow these steps:

- **Step 1:** Click Add New Profile
- **Step 2:** In pop-up window, make sure Temporary Profile is marked
- **Step 3:** Type position description as Last Name (i.e. Postdoc)
- **Step 4:** Select Department
- **Step 5:** Click Save
- **Step 6:** On Personnel tab, select Type (Key or Non-Key)
- **Step 7:** Select Role.
- **Step 8:** Click Add Person

The screenshot shows the 'Add New Profile' form with the following elements and numbered steps:

- Step 1:** 'Add New Profile' button in the top navigation bar.
- Step 2:** 'Temporary Profile' radio button in the 'New Profile' pop-up window.
- Step 3:** 'Last Name' text field in the 'New Profile' pop-up window, containing the text 'Postdoc'.
- Step 4:** 'Department' dropdown menu in the 'New Profile' pop-up window, showing 'LSUAM | Sch of VETM | Pathobiological Sciences | CC00293'.
- Step 5:** 'Save' button in the 'New Profile' pop-up window.
- Step 6:** 'Non-Key' dropdown menu in the top navigation bar.
- Step 7:** 'Post Doctoral' dropdown menu in the top navigation bar.
- Step 8:** 'Add Person' button in the top navigation bar.

- **Step 10:** The Budget Detail window will appear for the unnamed personnel/TBH you just entered. Enter number of personnel, effort months & salary requested. Calculate the salary based on the total number of personnel for each role. For example: If there are 2 Postdocs on the project, enter 2 in the Number of Personnel column and the total salary for both Postdocs in the Salary column.

- **Step 11:** Click the white arrow on the Fringe Benefits Column and choose the appropriate type from the dropdown list.
 - Faculty and Staff = Employee
 - Graduate Assistants = Health Insurance will populate under Fringe and Tuition remission will populate under Non-Personnel.
 - GA Calendar Health/Tuition FY26
 - GA Academic Health/Tuition FY26
 - GA Summer Health/Tuition FY26
 - 2-Year Postdoctoral Researcher, 2-Year Postdoctoral Researcher (AP), 2-Year Intern-Athletic, and 2-Year Intern-Non-Medical job codes = 2-Year Postdoc/Intern
 - Transient, Continent Workers, WAEs = Transient
- **Step 12:** Enter inflation for out years if desired.
- **Step 13:** If sponsor requests salaries in percent effort instead of person months, select Effort from the Person Months dropdown.
- **Step 14:** Click Save and Close to calculate.

Budget Detail for: Postdoc,

Detail Appointments Justifications Cost Sharing Effort Periods Save and Close Save Close

Costs by Budget Period Person Months Show Calculation Details

PERIOD	ROLE	NUMBER OF PERSONNEL	CALENDAR	ACADEMIC	SUMMER	SALARY	FRINGE BENEFITS	TOTAL
1	Post Doctoral	1	12.00	0.00	0.00	55,000	Employee 22,000	\$ 77,000
2	Post Doctoral	%	1	12.00	0.00	55,000	Employee 22,000	77,000
Total						\$ 110,000	\$ 44,000	\$ 154,000

Budget – Non-Personnel

There are 2 ways to add non-personnel cost: 1) Choose categories from dropdown list or 2) Click Add Bulk Entry to add up to 5 categories at a time.

Non-Personnel [hide] Step 2 Add Bulk Entry

CATEGORY	PERIOD 1	PERIOD 2	DIRECT COSTS
Tuition Remission	\$ 14,400	\$ 14,400	\$ 28,800
Subtotal Non-Personnel:		\$ 14,400	\$ 28,800

Select Budget Category Add Item

- **Step 1:** Choose from dropdown list.
 - **Step 1a:** Select cost category from dropdown list or type name and then select.
 - **Step 1b:** Click Add Item
 - **Step 1c:** On the popup, enter amount requested on the Detail tab. Year 1 amount will populate into out years. Enter inflation rate for the out years, if desired. You can also manually adjust out years.
 - Note: Tuition Remission is automatically added for Graduate Assistants from the Personnel section.

Non-Personnel Costs

Detail Justifications Cost Sharing Show Calculations Save and Close Save Close

Costs by "Budget Period" Annual Inflation *Manual Entry* Description Travel-Domestic

PERIOD	START DATE	END DATE	TOTAL	
1	01-Jan-2020	31-Dec-2020	5,000	Remove
2	01-Jan-2021	31-Dec-2021	5,000	Remove
Total			\$ 10,000	

- **Step 2:** Click Add Bulk Entry
 - **Step 2a:** Click Add Bulk Entry
 - **Step 2b:** Select cost categories from dropdown list or type name and then select.
 - **Step 2c:** Enter requested amounts and inflation, if desired. You can also manually adjust out years.
 - **Step 2d:** Click Add and click Close when done. Cost categories will populate under Non-Personnel. You can enter five (5) line items at a time.

Non-Personnel Costs

Bulk Entry Add Close

	INFLATION	AMOUNT
Select Budget Category	Period 1 %	\$ 0
Description:	Period 2 %	\$ 0
Inflation: Manual Entry		
Select Budget Category	Period 1 %	\$ 0
Description:	Period 2 %	\$ 0
Inflation: Manual Entry		
Select Budget Category	Period 1 %	\$ 0
Description:	Period 2 %	\$ 0
Inflation: Manual Entry		
Select Budget Category	Period 1 %	\$ 0
Description:	Period 2 %	\$ 0
Inflation: Manual Entry		

Budget – Subawards

See separate user guide for including [Subawards](#) in your proposal and budget.

Budget – Subprojects

Contact OSP for assistance.

F&A Tab

- F&A is automatically calculated based on the federally negotiated rate for Program Type and Location (on-campus vs. off-campus) of the project. See the bottom of the Budget Detail page.

	PERIOD 1	PERIOD 2	PERIOD 3	PERIOD 4	PERIOD 5	TOTAL COSTS
Total Sponsor Direct Costs:	\$ 194,380	\$ 162,410	\$ 165,530	\$ 168,748	\$ 172,055	\$ 863,119
Sponsor F&A:	73,003	74,353	75,742	77,174	78,648	378,920
Total Sponsor Costs:	\$ 267,383	\$ 236,763	\$ 241,272	\$ 245,918	\$ 250,703	\$ 1,242,039

- To adjust F&A, you will need to click on the F&A Tab. Institution Base/Target Scheme is equal to federal rate for Project Function and On/Off Campus location. Do not change.
- Step 1:** Projects funded by Louisiana state or local government (not federal flow-through)
 - Step 1a:** Change Scheme to Project Function or Off-campus for State (e.g. Research State On-Campus.)
 - Step 1b:** Click Apply to calculate.

Populates from Setup Questions. Do not change.

Calculation rate method: ☒ Prevailing ☐ Blended

Institution Base/Target Scheme: Research On-Campus

Base: MTDC

Rate: Research On-Campus

Effective: 48.000

Apply

Source View: Sponsor

- Step 2:** Projects with Sponsored Limited rates
 - Step 2a:** Select sponsor published base. Options are Manual, Modified Total Direct Costs (MTDC), Salaries, Wages and Fringe Benefits (SWF), and Total Direct Costs (TDC). If a sponsored limited base is not specified select TDC. If sponsor has a different base type, select Manual.
 - Step 2b:** Choose Rate of Manual Entry for limited rate. Choose rate of No IDC when sponsor does not allow F&A.
 - Step 2c:** For Manual Entry, a Rate box appears. Enter the sponsor limited rate.
 - Step 2d:** Click Apply to calculate.

Calculation rate method: ☒ Prevailing ☐ Blended

Institution Base/Target Scheme: Research On-Campus

Base: MTDC

Rate: Manual Entry

Rate: 0.000

Effective: 48.000

Apply

Source View: Sponsor

- Summary of F&A, which includes rate used, is at the bottom.

PERIOD	START DATE	END DATE	INDIRECT COST TYPE	RATE	BASE	AMOUNT
1 Detail	01-Jan-2020	31-Dec-2020	MTDC	10.000	73,800	7,380
2 Detail	01-Jan-2021	31-Dec-2021	MTDC	10.000	74,376	7,438
Total					\$ 148,176	\$ 14,818

- The Manual F&A button is used to enter the Sponsor F&A Base and Requested F&A amounts directly into the field versus an automatic calculation.

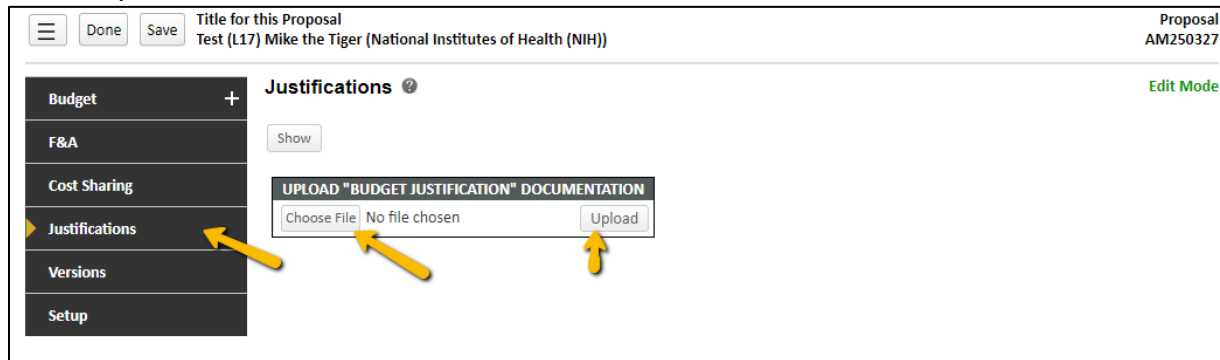
Cost Sharing

See separate user guide for including [Cost Sharing](#) in your budget.

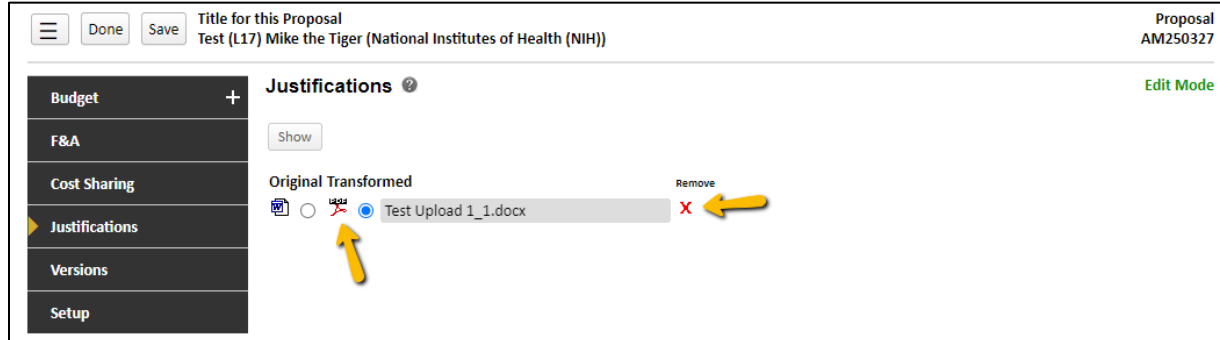
Justifications

If required by the sponsor, upload your budget justification on this tab.

- **Step 1:** Click Choose File to attach budget justification and click Upload. You can upload Word or PDF documents. GeauxGrants will convert Word documents to a PDF.



- **Step 2:** To open the uploaded file, click the PDF logo. Remove option is also available if new version needs to be uploaded.



Budget – Complete

- Once you have completed your budget, go to Budget tab and click Complete Button on top right corner.



- Once Budget is complete, Budget will be in View Mode, and you will need to click on Un-Complete Budget to make edits.

Done Save This is a test Grants.gov for other federal sponsors for Dept Admin trainings. (L14) Mike the Tiger (Office of Science/Department of Energy) Proposal AM200099

Budget - Project Period: 01-Jan-2020 to 31-Dec-2021 Source View: Sponsor Rollup subprojects: Not Rollup Proposal Structure Import/Export Build PDF Un-Complete Budget View Mode

Budget – Build PDF (Grants.gov/S2S)

To see your budget in the Grants.gov budget format, click Build PDF after budget has been Completed.

Done Save This is a test Grants.gov for other federal sponsors for Dept Admin trainings. (L14) Mike the Tiger (Office of Science/Department of Energy) Proposal AM200099

Budget - Project Period: 01-Jan-2020 to 31-Dec-2021 Source View: Sponsor Rollup subprojects: Not Rollup Proposal Structure Import/Export Build PDF Un-Complete Budget View Mode

Budget needs to be completed.

Budget – Export to Excel

- To export your budget to Excel to send to a sponsor, click Import/Export and then click Export Budget to Excel.

Budget - Project Period: 01-Jan-2020 to 31-Dec-2021 Source View: Sponsor Rollup subprojects: Not Rollup Proposal Structure Import/Export Complete Budget Edit Mode

- The Excel spreadsheet will consist of several tabs:
- Summary Tab** – breakdown of requested budget in each budget period and total amount. Personnel Salaries include both requested salary & fringe benefits. If sending this to sponsor, rename “Personnel Salaries” to “Personnel Salaries and Fringe Benefits.”

1	Budget for: This is a test manual proposal for Dept Admin	Tuesday, October 29, 2019			
2	Proposal:	AM200151			
3	Sponsor:	Alfred P. Sloan Foundation			
4	Investigator:	(L14) Mike the Tiger			
5	Project Period:	1/1/2020-12/31/2021			
6	Category	Item	Period 1	Period 2	Total
7	Personnel Salaries	(L14) Mike the Tiger	28,800	28,800	57,600
8		TBH	40,000	40,000	80,000
9		Subtotal Personnel:	68,800	68,800	137,600
10					
11	Materials and Supplies	Materials and Supplies	7,500	7,500	15,000
12	Operating Services	Operating Services	25,000	25,000	50,000
13	Travel-Domestic	Travel-Domestic	5,000	5,000	10,000
14	Tuition Remission	Tuition Remission	14,400	14,400	28,800
15		Subtotal Non-Personnel:	51,900	51,900	103,800
16					
17		Total Project Direct Costs:	120,700	120,700	241,400
18		Project F&A:	10,630	10,630	21,260
19		Total Project Costs:	131,330	131,330	262,660
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					
31					
32					
33					
34					
35					
36					

Summary Personnel F&A Cost Sharing Fully Loaded Budget

- **Personnel Tab** – breakdown of just personnel with fringe benefits and effort for each budget period. If sponsor does not require effort, then you can delete these columns.

	A	B	C	D	E	F	G	H	I	J
1				Period 1						
2				Person Months						
3	Personnel	Personnel Type	Role	Cal	Acad	Sum	%Effort	Salary	Fringe	Total
4	(L14) Mike the Tiger	Key	PD/PI	0.00	2.00	0.00	22.222%	20,000	8,800	28,800
5	TBH	Non-Key	Graduate	6.00	0.00	0.00	50.000%	40,000	0	40,000
6				Totals						
7										
8				Period 2						
9				Person Months						
10	Personnel	Personnel Type	Role	Cal	Acad	Sum	%Effort	Salary	Fringe	Total
11	(L14) Mike the Tiger	Key	PD/PI	0.00	2.00	0.00	22.222%	20,000	8,800	28,800
12	TBH	Non-Key	Graduate	6.00	0.00	0.00	50.000%	40,000	0	40,000
13				Totals						

- **F&A tab** – Will not use.
- **Cost Sharing tab** – breakdown of sponsor requested and cost sharing among the different sources in each budget period and total amounts. Personnel amounts include both requested salary and fringe benefits. If sending this to sponsor, rename “Personnel Salaries” to “Personnel Salaries and Fringe Benefits.”

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Category	Item	Period 1				Period 2				Totals				Total Project Costs
2			Sponsor	Institution e	Corporation	Unallowables	Sponsor	Institution e	Corporation	Unallowables	Sponsor	Institution e	Corporation	Unallowables	
3	Personnel Salaries	(L14) Mike the Tiger	14,400	7,200	0	7,200	14,400	7,200	0	7,200	28,800	14,400	0	14,400	57,600
4		TBH	40,000	0	0	0	40,000	0	0	0	80,000	0	0	0	80,000
5		Sub-Total Personnel:	54,400	7,200	0	7,200	54,400	7,200	0	7,200	108,800	14,400	0	14,400	137,600
6															
7	Materials and Supplies	Materials and Supplies	25,000	0	25,000	0	25,000	0	25,000	0	50,000	0	50,000	0	100,000
8	Operating Services	Operating Services	25,000	0	0	0	25,000	0	0	0	50,000	0	0	0	50,000
9	Travel-Domestic	Travel-Domestic	5,000	0	0	0	5,000	0	0	0	10,000	0	0	0	10,000
10	Tuition Remission	Tuition Remission	14,400	0	0	0	14,400	0	0	0	28,800	0	0	0	28,800
11		Sub-Total Non-Personnel:	69,400	0	25,000	0	69,400	0	25,000	0	138,800	0	50,000	0	188,800
12															
13		Total Direct Costs:	123,800	7,200	25,000	7,200	123,800	7,200	25,000	7,200	247,600	14,400	50,000	14,400	326,400
14		F&A:	10,940	720	2,500	720	10,940	720	2,500	720	21,880	1,440	5,000	1,440	29,760
15		Total Project Costs:	134,740	7,920	27,500	7,920	134,740	7,920	27,500	7,920	269,480	15,840	55,000	15,840	356,160

- **Fully Loaded Budget tab** – We will not use.