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Proposal Budget

Enter the proposal budget into the Coeus budget module.

- Coeus will automatically calculate inflation and salary increases as well as overhead.
- Budgets can be copied into multiple budget versions, or you can start new versions from scratch.
- You can create as many budget versions as needed, then mark one of them as final and complete for submission.
- If you have a pre-proposal that does not have a budget, mark the $0 budget as final and complete (otherwise Coeus will not let you submit).

**Coeus Budget Process Overview**

- Create a new budget
  - Select OH and UR rate types on summary tab
  - Set up and verify rates (sync budget rates if proposal was copied)
  - Adjust period boundaries if needed

- Add details for 1st period
  - Add details for first budget period
  - Personnel line items
  - Non-personnel line items

- Generate budget periods
  - Inflation will be applied automatically for most cost elements

- Adjust budget as necessary
  - Delete or add line items
  - Modify costs

- Other
  - If cost sharing is included in this budget, distribute the cost sharing
  - Print budget reports if desired

- Finalize budget
  - Select a budget version and mark that budget as final and complete.
Budget Primer

What do you need to enter a budget in Coeus?

A budget

- Needs to be specific
  - Needs to match Coeus cost elements
  - “Misc” is not specific!
- Typically provided by PI
  - or PI may ask you to create the budget

What are Direct Costs?

Direct costs are items that can be directly charged to the grant, including:

- Salaries & wages
- Benefits
- Consultants
- Travel
- Equipment
- Materials & Supplies
- Subrecipients

What are Indirect Costs?

As per Module 3 of the ORPA Sponsored Research Training for Dept Admins, indirect costs are items that “include those things essential to support sponsored activities that cannot be specifically identified and directly charged or attributable to a particular research grant or contract”. Examples include heating and cooling the building where the research is done and building maintenance, among other items. This link on the F&T website includes more information about the Indirect Cost rate.

Indirect costs have a few names and abbreviations; they all mean the same thing:

- Indirect Costs (IDC)
- Overhead (OH)
- Facilities & Administration (F&A)

What is Princeton’s Indirect Cost rate?

- 62% On campus
- 26% Off campus
- Sponsor may pay some other percentage
- Sponsor might not pay any OH (0%)

The indirect cost rate typically remains the same for several years.
What do MTDC & TDC mean?

MTDC stands for Modified Total Direct Costs
Some items are excluded from OH base calculation
i.e. tuition, equipment over $5k, subcontract amounts over the first $25k are excluded from the OH base calculation.

TDC: Total Direct Cost
OH is calculated on every cost element, including tuition and equipment over $5k.

What about Employee Benefits?

Most personnel items have benefits and are known by a few different names and abbreviations; they mean the same thing:

- Employee Benefits (EB)
- Fringe Benefits (“the fringe”)

The EB rate changes every year; see the ORPA Rate Sheet for the current year’s rate and the project rate.

This link on the F&T website includes more information about the EB rate.

Starting the Budget
The Budget Persons window opens with 12M Duration selected for everyone on the Investigator and Key Person tabs. You can update the appointment types now or later. (PIs are typically 9M Duration). The Job Code is from PS HCM and can be ignored here. Click OK (if Close is clicked, the people on this screen will not be listed in the Red Running Guy. So it’s better to click OK.)
The budget summary tab

The Summary tab displays budget cost information, is where the OH rate type is selected, and is where budgets are marked as Final and Complete before submission.

Before starting your budget, the most important things to verify are the start/end dates are correct and # of months are correct

- If the dates are wrong, close the budget screen (do not save), update the dates on the Proposal tab, and start a new budget
- If the # of months should not be 12 months per period, see the "Adjusting Period Boundaries" section.
<table>
<thead>
<tr>
<th>Summary Tab Field</th>
<th>What it means/how to fill it in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
<td>There’s always at least one budget version. You can create as many budget versions as you’d like.</td>
</tr>
</tbody>
</table>
| Final checkbox    | Check this box for your Final budget.  
  • A budget must be marked final before the budget can be marked Complete.  
  • A budget must be marked final in order to print generic Coeus forms like the generic Cover Page |
| Start & End Dates | Taken from the Proposal tab. If the date is wrong, do not change it here! Instead, close the budget (with the yellow folder icon in the second toolbar), change the start date on the Proposal tab, and then return to the budget. |
| Residual Funds    | This box is for a renewal of an existing award to specify the amount of funding left over. Generally not used. |
| Total Cost Limit  | If you want to set a cost limit for the entire proposal and be warned when the budget exceeds the limit, fill in an amount here. |
| OH Rate Type      | The Overhead Rate type. Default is our standard 62% OH rate. |
| Total Cost        | Automatically calculates as you fill in the budget period screens and save. This is the total cost to the sponsor and does not include cost sharing. |
| Total Direct Cost Limit | If you want to set a direct cost limit for the entire proposal and be warned when the budget exceeds the limit, fill in an amount here. |
| Direct Cost       | Automatically calculates as you fill in the budget period screens and save. This is the total direct cost to the sponsor and does not include cost sharing. |
| Indirect Cost     | Automatically calculates as you fill in the budget period screens and save. This is the total indirect cost to the sponsor and does not include cost sharing. |
| Underrecovery     | The difference between Princeton’s standard 62% rate and the rate the sponsor is paying. Other schools make their professors come up with this difference but Princeton does not.  
  • You cannot submit a proposal with positive underrecovery. To avoid positive underrecovery:  
    o Make sure the UR Rate Type is the same as the OH Rate Type  
    o Do not uncheck the OH box on the Line Item Detail screen  
  • Negative underrecovery is a Coeus quirk and can be ignored. |
| Cost Sharing      | Automatically calculates as you fill in the budget period screens and save. This includes directs and indirects, even when indirects are not allowed by the sponsor. |
| Comments          | Great way to discuss tricky situations or add notes to distinguish budget versions |
| Budget Status     | Default is Incomplete. Change it to Complete when you are finished entering budget details. You can always mark it incomplete again to make more changes before submission. |
| UR Rate Type      | The Underrecovery Rate Type. Always make sure the UR Rate Type matches the OH Rate Type. |
| On/Off Campus     | Leave it as “Default” |
| Modular Budget    | Only check this box if your proposal is an NIH Modular Budget that will be submitted via s2s. |
| Submit Cost Sharing | Always leave this box checked. |
| Proposal hierarchy | Indicates if the proposal is in a hierarchy or not.  
  • Red X: not in a hierarchy  
  • + sign: parent of the hierarchy  
  • – sign: child of the hierarchy |
| Info at bottom of screen | Summarizes start/end dates, # of months, and costs by budget period.  
  • # of months defaults to 12 per period. To change the number of months per period, see the “Adjust Period Boundaries” section.  
  • Costs automatically calculate as data is entered in each period and save is pressed. |
Entering Personnel Items: Overview

Personnel cost elements

<table>
<thead>
<tr>
<th>Personnel</th>
<th>Use this Budget Item...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>SALRF – Regular Faculty</td>
</tr>
<tr>
<td>Grad Students</td>
<td>SALGS – Assistants in Research and Instruction</td>
</tr>
<tr>
<td>Post-docs (not s2s)</td>
<td>SALOS – Salary DOF Other Staffs</td>
</tr>
<tr>
<td>Post-docs (s2s)</td>
<td>202PDOCS – s2s only after 7/1/14: Postdoctoral Associate</td>
</tr>
<tr>
<td>Undergrads</td>
<td>WAGESH – Student Hourly Wages</td>
</tr>
<tr>
<td>Admin or Tech staff (only if sponsor allows it)</td>
<td>SALADM – Salary HR Admin &amp; Tech</td>
</tr>
<tr>
<td>Biweekly staff (only if sponsor allows it)</td>
<td>SALBW – Salary HR Bi-Weekly.</td>
</tr>
</tbody>
</table>

Methods for entering personnel items:

1. **Running Guy/ Red Baron method:** The cost is calculated for you based on data you enter in the Running Guy and Red Baron for the person’s:
   - Base salary
   - Number of months
   - Percent charged/effort

2. **Manual method:** Or, you can manually enter the sponsor’s cost directly on line item

In the first method, Coeus is calculating the cost for you. In the second method, you are calculating the cost outside of Coeus and then entering that value into the Coeus budget. If you are going to do s2s proposals, then you have to learn the first method. If you are never going to do s2s or your budget is an NIH s2s modular budget, then you can enter your costs using the second method.

Some users use the red baron for every proposal they submit regardless of sponsor and submission method, and others never use it.

**Entering Personnel Items using The Running Guy and The Red Baron**

**Personnel**

In this example, let’s enter Faculty Salary for 2 summer months for the PI.

![Click on the Red Running Guy](image-url)
Appt Type: Typically 9 months for PIs
Fill in the Calc Base manually.
The Calc Base is the salary as of the Eff Date.
In this example, $30k divided by 9 = $10k per month.
Einstein and Curie are our PIs and Debbie Fields is a Key Person
Click OK.

1. Click on the Period 1 tab.
2. Click on the Add button (in the second toolbar, it's the first button).

Double click in the Cost Element (CE) box for that row.
Select the cost element & click OK
Click Add.

Click on the person so their row is blue, then click on OK.
Let’s budget 2 summer months of faculty salary.

Change start/end dates to appropriate dates (2 months for this example). Select the Period Type.

% Charged: What percentage of the time in the start/end dates is being charged to the project?
% Effort: What percentage of the time in the start/end dates will that person spend working on the project?

Click OK.

The Salary is $20,800, not $20k, because Coeus automatically inflates most cost elements at 4% every 7/1. 4% of $10k a month is $400 times 2 months is $800.

After click OK, this row returns. Quantity and Cost and are filled in. Manually enter a description for the line item. It helps you and your ORPA rep. If you need to change the cost, you have to use the red baron and/or red running guy. You can’t click into the Cost box and directly change the amount because you used the Red Baron.
TBA Personnel (Grad student example)

You might not know every named person in your budget, for example, grad students or a person who will be hired only if the project is funded.

In the running guy, click "Find Person" to add a TBA.

It is tempting to click "Add TBA" but nothing is in that button.

Enter tba* in the Last Name box & Click Find.

A list of all TBA types appears. Hover your mouse over the divider between the columns and drag the divider over to see the full "names" of the TBA people.
Highlight the row for the TBA person you want, then click OK.

If the TBA type you want is not here, select the first row, TBA.

For this example, the grad student is working the full 12 months (10 academic months at $28,450 + 2 summer months at $8,000) for a total of $34,450. Click OK.

Add a blank row with the Add button in the second toolbar. Double click in the CE box for the new row. Select SALGS for the grad student salary. With the SALGS row highlighted, click on the Red Baron.
1. Click Add

2. Select the TBA Grad Student row.

3. Click OK

Since the Grad Student will work all 12 months, the start/end dates don't need to be updated.
Change Period to Calendar
Change % Charged and % Effort to 100%.

The salary is inflated every 7/1 by 3% for grad students (0% for undergrads, 4% for most everyone else) so the salary is more than the initial salary.

Click OK.
The Quantity and Cost are then returned. Type in the description for the Grad Student.

If you want to change the cost, you have to change the info in the red baron and/or red running guy. You can't change the info in the cost column directly once you've used the red baron.

More than one TBA person of the same type

To add the second TBA person of the same type, click on the Red Running Guy

Click Find Person
Enter tba* and click Find.

Select the TBA person and click OK.

At this moment, Coeus thinks these two TBA people are the same person because they have the same name and the same job code.
Change the Job Code to be different. Now Coeus thinks these are two different people. Enter the Appt Type & Calc Base. Click OK.

1. Add a new blank row.
2. Double click in the CE box for the new row and select SALGS.
3. Click on the Red Baron.

1. Click Add
2. Select the row for the TBA2 Grad Student
3. Click OK
Let’s say you have grad students who will only work the summer, or you have a summer undergraduate who only works 2 months. Finally there is a 2 month employee type. You can use this type in the red running guy and red baron.

Let’s say you have grad students who will only work the summer, or you have a summer undergraduate who only works 2 months. Finally there is a 2 month employee type. You can use this type in the red running guy and red baron.

Since the Grad Student will work all 12 months, the start/end dates don’t need to be updated.

Change period to Calendar.
Change % Charged and % Effort to 100%.

The salary is inflated by 3% for grad students (0% for undergrads, 4% for everyone else) so the salary is more than the initial base salary.

Click OK.

NOTE: with s2s, this grad student scenario can be done differently--which is covered in the s2s manual.

The quantity and cost are then returned. Enter a description for the person you just added.

Always use separate rows for each TBA person. Never put two TBA people in the same Red Baron screen.
Red Baron Troubleshooting Tips

If cost comes out as $0, or a value you didn’t expect, double check...

- Running guy
  - Appt type correct?
  - Eff date ok?
  - Base salary filled in?

- Red baron
  - Start and end dates correct?
  - % charged and % effort filled in?

- Don’t want cost sharing?
  - % charged has to be equal to % effort

- Want cost sharing?
  - % charged has to be less than % effort to generate cost sharing

- Press save! Sometimes pressing save resolves all issues.

Red Baron and no inflation

If you don’t want inflation to be applied and you’re using the red baron...

- Use the running guy as usual
- Add your blank line item
- Select cost element
- Double click on cost element description
- Uncheck the “Apply Inflation” box
- THEN go to the red baron and use red baron as usual
- Inflation will not be applied
Removing a Line Item where the Red Baron was used

1. Highlight the line item.
2. Click the Red Baron
1. Click Delete
2. Click Yes.

The row then disappears.
Click OK.
Entering Half a Summer Month in the Red Baron

What if you want to budget half a summer month?

- Currently the monthly salary is $10k a month.
- With 7/1 there’s 4% inflation, salary is $10,400 a month.
- So, half a summer month is $5,200, right?
• Coeus is calculating a daily rate (not a monthly rate).
• For months with an odd number of days, like July:
  - $10,400 divided by 31 days = $335.48 per day
  - 7/1-7/15 is 15 days = $5032.26
  - 7/1-7/16 is 16 days = $5367.74
• So if you want $10,400 divided in half as $5200....

Fill in 1 month.
50% Charged
50% Effort
Now it's exactly $5,200
Adding post-docs to the budget

As per Princeton’s policy, up to 97% of a post-doc salary can be charged to a grant. Here is how you would enter that data in Coeus using the red baron. In the red running guy, the Calc Base is the post-doc’s full salary.

In the Personnel Budget Details window, the %Charged and %Effort can both be up to 97%. By having the %Charged and %Effort values the same, cost sharing will not be generated. The salary amount is then 97% of the full salary, with 4% inflation as of 7/1).

NOTE: For s2s proposals, use 202PDOC; otherwise use SALOS.
Entering Personnel Items manually

Click Add button

Double click in CE box.

Click on the cost element so the row is blue, then click on OK.
Why use the red baron for personnel? Why enter the personnel cost directly on the line item?

Why use the red baron?

• You are using Coeus's ability to calculate cost based on the person's salary, number of months, % charged and % effort.
• You're submitting a detailed budget via s2s

Why enter the personnel cost directly on the line item?

• You already calculated the cost to sponsor outside of Coeus and want to directly enter the cost directly on the line
• You're submitting a NIH modular budget via s2s
• You're not submitting via s2s

How Coeus calculates personnel salary and employee benefits

Budgets that start on the 1st of the month and end on the last day of a month using the red baron

For this example, the budget period 1 is 12 months. It starts 11/1/20 and ends 10/31/21.

Let’s say a person’s salary is $120,000 a year as of 7/1/20. The person has a 12 month appointment. Coeus divides by 12 to get the monthly rate of $10,000 a month for Nov and Dec 2020 and Jan through
June of 2021. Starting with July 1, 2021, Coeus then applies the inflation rate in the rate table (currently 4%). It takes $10,000 times 1.04 to get $10,400 as the monthly rate for July, Aug, Sept, and Oct 2021.

So that’s $10,000 for 8 months (Nov 2020 through June 2021) = $80,000

And $10,400 for 4 months (July 2021-Oct 2021) = $41,600

For a total of $121,600 for budget period 1.

Budgets that do not begin and/or end on the 1st and/or last day of the month using the red baron.

Let’s say you want to verify the Coeus calculations are correct. If your budget doesn’t start on the first of the month or end on the last day of the month, you will have to calculate the daily salary rate and multiply by the number of days in that budget period for that month, and then do the calculations for the remaining months.

Here’s how the calculation is done. Let’s say the budget is from 10/16/20-9/30/21. The budget period starts in a month that has 31 days. The budget period ends on the last day of the month.

Let’s say a person’s salary is $120,000 a year as of 7/1/20. The person has a 12 month appointment. Coeus divides by 12 to get the monthly rate of $10,000 a month for Nov and Dec 2020 and Jan through June of 2021.

At this point, to determine the Oct 2020 salary, it is tempting to take the $10,000 monthly salary and divide by 2 to calculate half a month’s salary, which would be $5000, but that’s incorrect. Half of the month of October would be 15.5 days. Coeus counts the actual dates for the budget period, which are full days. Oct 16 to Oct 31 is 16 days of salary, not 15.5.

For October 2020, it calculates a daily rate (so $10,000 divided by 31 = $322.58064 per day (don’t round to $322.58 at this point...)). The number of days from 10/16/20 to 10/31/21 is 16 days. Take the $322.58064 unrounded daily rate and multiply by 16 to get the value for Oct, which is $5161.29—more than the $5000 that was initially assumed in the example.

Starting with July 1, 2021, Coeus then applies the inflation rate in the rate table (currently 4%). It takes $10,000 times 1.04 to get $10,400 as the monthly rate for July, Aug, and Sept, which are all full months.


And that’s $10,000 a month for 8 months (Nov 2020 through June 2021) = $80,000

And $10,400 a month (with the 4% inflation) for 3 months (July 2021-Sept 2021) = $31,200

Add those figures together for a total of $116,361.29 for the entire budget period of Oct 16, 2020 to Sept 30, 2021. (If you had rounded the daily rate to $322.58, then your calculations would be a penny less at this point, at $116,361.28).

A similar calculation would occur if the budget started on the first of the month, and ended on, say the 15th of the month. To calculate the portion of the final month, take the monthly rate, divide it by the number of days in the month to calculate the daily rate, and then multiply by 15 to get the total amount for that month.
Figuring out employee benefits for budgets that start on the 1st of the month and end on the last day of a month, not using the red baron

Let’s say you enter the budget amount directly on the line item itself, and the amount is $2250.

It doesn't matter when the start or end date of the budget period is, Coeus will calculate a daily rate. So if it's not a leap year, divide by 365 to get the daily rate (in this case $6.16 per day).

Let’s say the budget starts 6/1, so the benefit rate changes 7/1. $6.16 a day times 30 days for the month of June is $184.93. For this example, the EB rate is 34.8%. That comes out to $64.36. Then for the other 11 months, the provisional EB rate is 34.0%. So $6.16 a day times 335 days is $2,065.07, times the 34.0% rate is $702.12. The grand total for EB in the first year of this budget for this line item is $766.48.

Adding non-Personnel Items

Adding most non-personnel items
Adding Human Subjects Payments and Adding Animal Supplies costs

- Human subject payments:
  - ☐ PRFSVC Professional Services should be used for human subject payments
- Animal Research Costs:
  - ☐ If there is a good understanding of how much will be incurred through the Princeton Lab Animal Resource (LAR) lab, use RECHOH Recharge Centers; otherwise, use SMSUP Scientific & Medical Supplies for animal research costs.

Adding Tuition

- Use AIARTU for grad student tuition
- Half tuition is charged if sponsor is paying the 62% OH rate
- Full tuition is charged if the sponsor is not paying the 62% OH rate
• Current Rate is on the ORPA Rate Sheet on the ORPA home page.

**Subawards**

- Princeton collects OH on first $25k of a sub
- Princeton does not collect OH on the remainder of a sub

**Period 1:**
Use SUBL25 for the first $25k of a subaward.
Use SUBG25 for the remainder.

Here, the sub to Harvard is $40k.
SUBL25 is $25k
SUBG25 is $15k (the remainder).

**Period 2:**
Enter the full sub amount in SUBG25 in subsequent years, since Princeton will already have collected OH on the first $25k in year 1.
Enter the full sub amt in SUBG25 in subsequent years, since Princeton will already have collected OH on the first $25k in year 1.

Add two lines, one for each subaward. Enter the sub's institution in the Description.

Use SUBL25 for the first $25k.
Use SUBG25 for the remainder.
Generating periods, adding more line items, deleting line items, etc

Other Options

Enter the full sub amt in SUBG25 in subsequent years, because Princeton will already have collected OH on the first $25k.
Line Item Detail box—unchecking “apply inflation”

Note that while you can select off campus rates here and 26% OH will be applied to that line item, it is generally preferred that proposal hierarchy is used and a separate proposal is created for off campus items. This is because it is more straightforward for the ORPA Award Specialists to create projects at award setup.
Generate Periods

Once you’ve filled in all line items that will be entered into period 1, now you can use the Generate Periods button to generate the remaining budget periods.

Note that once periods are generated, they cannot be generated again.

Viewing Generated Periods
The Total Tab

The total tab shows the total by cost element and period as well as the grand total.

Delete Line Item

1. Select line item to be deleted.

2. Press the delete button.
Adding a line item to all periods after generating

The line item disappears. Repeat as necessary for each line and/or period.

Adding a line item to all periods after generating

2. From the Items menu, select "Apply to later periods"

In period 1, add the line item and enter the description, quantity (if applicable) and cost.
The line is added to each period thereafter.
Viewing EB and OH for line items, viewing which lines are On or Off campus, or have underrecovery.

To show EB and OH for each line item, or to add columns to view On/Off campus lines, cost shared lines or lines with underrecovery, click on the Wrench button in the second toolbar.

Check off the items you want to see.

"Show Calculated Amounts" will show the OH and EB for the highlighted item at the bottom of the screen.

Checking the other boxes will add columns to the display. You can uncheck items you don't want to see, then click OK.
1. If "Show Calculated Amounts" was checked, then the bottom of the screen will show OH and EB for the highlighted row.

2. If you checked off other boxes, move the scroll bar to the right.
New columns will appear for the boxes you checked off.
If you need more space, you can uncheck the start/end date boxes in the wrench button, or can manually move the column dividers over on this screen.
However, once you click into another period or close and reopen the budget, the default view resets itself.
Changing OH, EB, Inflation Rates

OH rate is 0%

You will have to click “Yes” twice to this message for OH Rate Type and twice to this message for UR Rate Type.

You’re done!

Each time you change a OH or UR Rate Type, you’ll get this message:

You will have to click “Yes” twice to this message for OH Rate Type and twice to this message for UR Rate Type.

OH rate is 10%

Select the OH and UR rate type as appropriate, either:

- MTDC – 10%
- TDC – 10%
- Most likely it’s “TDC -10%”
OH rate is some other percentage

In this example, the sponsor’s OH rate is 17.2% and the base is TDC.

Select OH Rate Type and UR Rate Type as "TDC - Custom"
Click on the Rates button in the second toolbar.

It's very tempting to change the rates in the MTDC (or TDC) section, but scroll down to change it in the "TDC - Custom"

The default rate is 0%
Then press Save.

**Negative underrecovery**

Negative underrecovery is generated every time you use the “MTDC-custom” or “TDC-custom” OH and UR Rate Types.
How to avoid positive underrecovery

- Change OH rate in proper section of rates table.
- Make sure your OH and UR rate types are the same!
- Do not uncheck the Apply box in Budget – Line Item Detail box

Negative underrecovery will be generated. That's OK! It's a Coeus quirk. It's positive underrecovery that's a problem.
Change employee benefit rate
When sponsor pays a different EB rate than Princeton’s rate

Coes automatically inflates as follows:

- 4% for most items
- 3% for grad student stipends
- 0% for undergrads
Syncing Rates

Each year the Princeton Employee Benefit rate is renegotiated with the federal government.

The rates are not changed in Coeus until the University Treasurer signs the new rate agreement and the agreement has been posted on the F&T website.

Please don’t use the new rates in proposals until the rates have been officially updated in Coeus because the new rates are not legally binding until the agreement has been fully executed.

If you’re working on a proposal and ORPA sends the notification stated the employee benefit rate has been updated in Coeus, you have two options on how to update the rates for your proposal:

1. If your OH rate is MTDC or TDC, and you have not changed inflation rates, you can click on the rates button (% sign in the second toolbar in your budget) and click sync, click ok, and then save. This will then calculate using the new EB rate.
2. If your OH rate is “MTDC- custom” or “TDC – custom”, or you changed the inflation rate, then click on the rates button, scroll to the EB section and manually change the rates for every row and every fiscal year. Don’t press sync! (If you press sync, your custom OH rates will be reset back to 0 and inflation rates will be reset back to the defaults; you’ll have to change those rates all over again.)
Cost Limits

Direct cost limits—great for NIH modular budgets

3. From the Items menu, select "Sync to Direct Cost Limit"

1. Enter the Direct Cost limit

2. Highlight the row where you want Coeus to "do the math" so the total direct cost comes up to your direct cost limit.

Press Sync. It syncs ALL values (EB, OH, inflation) in this table to current values.
Note: When you press the save button, Coeus will warn you if you’ve exceeded your Direct Cost Limit.

**Total cost limits**
Coeus then "does the math" for you and adjusts your line item up or down to match the total cost limit. NOTE: Due to OH rounding, sometimes the Total Cost is a penny over or under the cost limit. If you want to, you can manually adjust a line item value by a penny.

Note: When you press the save button, Coeus will warn you when you’ve exceeded your Total Cost Limit.

**Printing**

**Printing inside the budget**

While in the budget screen, from the File menu, click Budget Summary.
You can select more than one report to print at one time if you want.

Ignore the "Print Budget Comments" box. Even if you check off that box, the budget comments will not print.

Industrial budgets print the budget item's direct cost, indirect cost and benefits as one amount.
Printing outside of the budget

1. Select the report you want to print.
2. Press print.

NOTE: A budget must be marked as final in order for these cost sharing reports to print.
### Cost Share Report

**Sponsor:** National Science Foundation  
**Principal Investigator:** Cava, Robert  
**Project Period:** From 12/01/2016 to 11/30/2019  
**Total Project Amount:** $602,513  
**Total Cost Share:** $10,548  
**Proposal #:** 00018454  
**Title:** Kyle demo 10/20/14

<table>
<thead>
<tr>
<th>PROJECT YEAR</th>
<th>UNIT PG NUMBER</th>
<th>UNIT NAME</th>
<th>COST SHARE AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>23500</td>
<td>CHM-Chemistry</td>
<td>$3,000</td>
</tr>
<tr>
<td></td>
<td>54002</td>
<td>General Funds Inc Coll</td>
<td>$1,800</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$4,800</td>
</tr>
<tr>
<td>2018</td>
<td>23500</td>
<td>CHM-Chemistry</td>
<td>$3,000</td>
</tr>
<tr>
<td></td>
<td>54002</td>
<td>General Funds Inc Coll</td>
<td>$1,800</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$4,800</td>
</tr>
<tr>
<td>2019</td>
<td>23500</td>
<td>CHM-Chemistry</td>
<td>$3,000</td>
</tr>
<tr>
<td></td>
<td>54002</td>
<td>General Funds Inc Coll</td>
<td>$1,800</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$4,800</td>
</tr>
</tbody>
</table>

**Total Cost Share:** $10,548

---

**Contribution Details Report** shows cumulative cost sharing by unit, amount, and type

<table>
<thead>
<tr>
<th>Contributing Unit</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>23500CHM-Chemistry</td>
<td>$9,000</td>
</tr>
<tr>
<td>54602General Funds Inc Coll</td>
<td>$5,580</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Travel</td>
<td>$9,000</td>
</tr>
<tr>
<td>F &amp; A</td>
<td>$1,548</td>
</tr>
</tbody>
</table>
Princeton University
Chocolate Chip Cookies are GREAT!

Principal Investigator
Robert J Cava

Co-Principal Investigator

Presented to
Cookie University
Debbie Fields
12:2 Cookie Boulevard

Cookie, PA 22220

Project Period
10/01/2012 to 09/20/2015

Total Project Amount
$659,700

Principal Investigator
Chemistry
116A Fick Chemistry Laboratory
Princeton, NJ 08544

roawa@princeton.edu
609.258.3910

Authorized Institution Official
Jeffrey Finkelstein
4 New South Building
PO Box 36
Princeton, NJ 08544-2020

awards@princeton.edu
P: 609-258-3090
F: 609-258-1159

Business Contact
Jeffrey W Peniss
Office of Research and Project Administration
4 New South Building
Princeton, NJ 08544-0036

jpettis@princeton.edu
P: 609258.6325
F: 609258.1159

A budget must be marked as final AND the mailing address must be filled in on the Mailing Info tab for the generic cover page to print.

Some depts print this page and others never print it.
Adding Budget Versions (new, copied)

Start another new budget from scratch

First, if the budget screen is open, close it. Then...

1. Click on the Money Bag
2. Click New
Select Appt Types if you will use the red baron; otherwise click OK.

Now you have a brand new budget version to work in.
NOTE: Copying pre-Prime proposals with budgets:

- All the old cost elements were used pre-Prime.
- Coeus will not let you submit a budget with the old cost elements.
- You will have to replace the old pre-Prime cost elements with the new Primed budget items in your copy.

First, if the budget screen is open, close it. Then...

1. Click on the Money Bag
2. Click on the row you want to copy so the hand points to it
3. Click Copy
4. Click OK

Choose an option. Click OK.
Marking Budget as Final and Complete

Marking budget as final

You can mark a budget as final at any time, even when you’ve just started a budget.
If you're on the budget Summary screen, check the Final box.

Then press Save.

Then click Yes.

From outside the budget screen, click on the Yellow Money Bag.

Check the box for the version that should be Final.

Click OK.
Marking the budget as complete

A budget must be marked Final first before it can be marked Complete. A budget must be marked Final and Complete before the proposal can be submitted for approval.
The budget is marked final & complete but I need to make changes & Coeus won’t let me make changes.

NOTE: Once the budget is marked final and complete, the “New”, “Modify”, and “Copy” buttons are grayed out. To activate those buttons again, change the budget status to Incomplete and the buttons will illuminate. Then you can add a new budget, modify or copy an existing budget.
Non 12-month budget periods

Coeus defaults proposal periods to 12 months each. If your proposal periods are different than 12 months, follow these steps before you start entering budget items.

Start a new budget. From the Budget Periods menu, select "Adjust Period Boundaries".
Start manually adjusting dates. In this example:
period 1 is 4 months
period 2 is 8 months
period 3 is 6 months

To add period 4, click Add...

...and fill in dates for period 4
Repeat until all periods are filled out, then click OK.

Verify the number of months for each period is right. If incorrect, go back to Budget Periods, Adjust Period Boundaries, and correct the dates BEFORE adding cost elements.
Changing Dates

If you're in the middle of your Coeus proposal and your PI decides to change the proposal dates, you must follow these steps in this order, otherwise it will not work:

1. Change Start and End Dates on the Proposal tab. Here I shifted the dates by a month.
2. Press Save.

Select budget you want to modify and click the Modify button.
Now review and tweak your budget. If you used the red baron, you will (probably) have a lot to fix.

For example, this was 7/1/17-8/31/17 but now Coeus advanced it 1 month, 8/1/17-10/1/17.

You will have to manually change the dates to what they should be in the red baron.
No Budget

Sometimes, there’s no budget (i.e. many pre-proposals have no budget)
You will get the message (screenshot below) when trying to submit...
Mark your $0 budget final and complete, then you can submit.

Budget Tips & FYIs

Tip: Fast way to select cost elements

Type in cost elements (in all caps) instead of selecting from menu

Type CE in all capitals.

Click or tab out of CE field, and the description is filled in automatically.
FYI: Typing in cost box

Type in Cost and press return...

...cursor is now in the CE box, not in the cost box

...so if you start typing in "cost" because you think you're in the cost box, it's actually appending to the CE box.
Then when you click or tab out of the CE box, you get this message.

Coeus then resets the CE box back to what it was. Now you can enter the cost in the Cost box.
FYI: Overwriting costs

The cost of this trip was initially $10k.

Now the cost of the trip is $22,222.00. So you highlight the value.

So you start to type the new value. Coeus places the new value at the front of the cost instead of overwriting the cost.

Instead, you can highlight the value without the $ and type the correct value. It will overwrite the value.

Alternatively, you can highlight the value (including the $ sign), enter the new value, and when you press the period key, the old value will disappear.
Tip: Quantities

- Entering a quantity doesn't always make sense.
- You don’t have to enter quantities (except for s2s with participant support costs).
- Do not enter quantities over 99; Coeus can’t handle it!

Tip: Adding blank rows

- You can add a lot of blank rows to your budget.
- Once you press save, any blank row without data (i.e. it’s still blank!) will be removed from your budget.

Tip: Save frequently!

- Please please please save your budget frequently. It is SO heartbreaking to spend an hour entering a HUGE budget and then Coeus tells you it can’t save your budget. Save frequently and that way, when Coeus doesn’t like something, you will know what it didn’t like (whatever it was you entered since your last save!)
### Coeus Cost Elements and Prime Budget Items Charts

#### Mapping of retired Coeus cost elements to new Prime budget items

<table>
<thead>
<tr>
<th>Old Cost Element</th>
<th>Description</th>
<th>New Prime Budget Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BPG201</td>
<td>Faculty Salary</td>
<td>SALRF</td>
<td>Salary – Faculty</td>
</tr>
<tr>
<td>BPG202</td>
<td>Professional research &amp; technical staff</td>
<td>SALOS</td>
<td>Salary – DOF Other Staffs</td>
</tr>
<tr>
<td>BPG204</td>
<td>Admin, other tech &amp; shop labor</td>
<td>SALADM</td>
<td>Salary – HR Admin</td>
</tr>
<tr>
<td>BPG207</td>
<td>Special Payroll</td>
<td>SALADM</td>
<td>Salary – HR Admin</td>
</tr>
<tr>
<td>BPG208</td>
<td>Student Wages Undergrads</td>
<td>WAGESH</td>
<td>Student Hourly Wages</td>
</tr>
<tr>
<td>BPG209</td>
<td>Assistants in Research Grads</td>
<td>SALGS</td>
<td>Salary – Asst in Res &amp; Instruc</td>
</tr>
<tr>
<td>BPG210</td>
<td>Purchased Labor/ Other Personnel</td>
<td>SALADM</td>
<td>HR Admin Salary</td>
</tr>
<tr>
<td>BPG211</td>
<td>Student Health Fee – no IDC</td>
<td>FELTUI</td>
<td>Fellowship Tuition</td>
</tr>
<tr>
<td>BPG212</td>
<td>Assistants in Research Tuition – no IDC</td>
<td>AIARTU</td>
<td>Assistantship AI/AR Tuition</td>
</tr>
<tr>
<td>BPG213</td>
<td>Fellowship Tuition – no IDC</td>
<td>FELTUI</td>
<td>Fellowship Tuition</td>
</tr>
<tr>
<td>BPG214</td>
<td>Fringe Benefits</td>
<td>FRINGE</td>
<td>Fringe Benefits</td>
</tr>
<tr>
<td>BPG216</td>
<td>Other Student Aid Support – no IDC</td>
<td>FELSTI</td>
<td>Fellowship Stipend</td>
</tr>
<tr>
<td>BPG220</td>
<td>Materials &amp; Services</td>
<td>SMSUP</td>
<td>Scientific &amp; Medical Supplies</td>
</tr>
<tr>
<td>BPG235</td>
<td>Rent, space, &amp; equipment</td>
<td>RENT</td>
<td>Rental Expense</td>
</tr>
<tr>
<td>BPG236</td>
<td>Subcontracts over $25k – no IDC</td>
<td>SUBG25</td>
<td>Sub-Contracts over $25k</td>
</tr>
<tr>
<td>BPG239</td>
<td>Subcontracts up to $25k</td>
<td>SUBL25</td>
<td>Sub-Contracts $25k and below</td>
</tr>
<tr>
<td>BPG250</td>
<td>Light &amp; Power – no IDC</td>
<td>UTIL</td>
<td>Utilities</td>
</tr>
<tr>
<td>BPG260</td>
<td>Departmental Charges Miscellaneous – no IDC</td>
<td>INSTAL</td>
<td>Institutional Allowance</td>
</tr>
<tr>
<td>BPG266</td>
<td>Computer – no IDC</td>
<td>COMPNO</td>
<td>Computer HW &amp; SW w/o OH</td>
</tr>
<tr>
<td>BPG275</td>
<td>Domestic Travel</td>
<td>DOMTRV</td>
<td>Domestic Travel</td>
</tr>
<tr>
<td>BPG276</td>
<td>Foreign Travel</td>
<td>INTTRV</td>
<td>International Travel</td>
</tr>
<tr>
<td>BPG280</td>
<td>Equipment – no IDC</td>
<td>SMEQUP</td>
<td>Scientific &amp; Medical Equipment</td>
</tr>
<tr>
<td>BPG288</td>
<td>Ancillary Costs of Equip/Construct – no IDC</td>
<td>RECSVC</td>
<td>Real Estate, Construction Svcs</td>
</tr>
<tr>
<td>BPG289</td>
<td>F&amp;A Costs</td>
<td>FACADM</td>
<td>Facilities and Administration</td>
</tr>
<tr>
<td>BPGALL</td>
<td>Total Direct Costs</td>
<td>TOTDIR</td>
<td>Total Direct Costs</td>
</tr>
<tr>
<td>Budget item</td>
<td>Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COMPOH</td>
<td>Computer HW &amp; SW w OH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FELSTI</td>
<td>Fellowship Stipend</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OAGSUP</td>
<td>Office/General Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PARTC</td>
<td>Participant Support (only if you’re not submitting via s2s—if you’re submitting via s2s use the appropriate specific pre-Prime s2s elements instead)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRFSVC</td>
<td>Professional Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RECHNO</td>
<td>Recharge Centers without F&amp;A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RECHOH</td>
<td>Recharge Centers with F&amp;A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SALBW</td>
<td>Salary - HR Bi-Weekly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TECSVC</td>
<td>Tech Services</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pre-Prime Coeus cost elements that remain in Coeus for s2s</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>If you’re submitting via s2s, use these pre-Prime cost elements</strong></td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>202PDOC</td>
</tr>
<tr>
<td>220ODC</td>
</tr>
<tr>
<td>BPG205</td>
</tr>
<tr>
<td>BPG230</td>
</tr>
<tr>
<td>BPG233</td>
</tr>
<tr>
<td>BPG261</td>
</tr>
<tr>
<td>BPG312</td>
</tr>
<tr>
<td>NIHSUB1</td>
</tr>
<tr>
<td>NIHSUB2</td>
</tr>
<tr>
<td>NIHSUB3</td>
</tr>
<tr>
<td>NIHSUB4</td>
</tr>
<tr>
<td>OTHERS</td>
</tr>
<tr>
<td>STIPEND</td>
</tr>
<tr>
<td>SUBSISTE</td>
</tr>
<tr>
<td>TRAVEL</td>
</tr>
<tr>
<td>TUITION</td>
</tr>
</tbody>
</table>

**For the NIH Fellowship Form for s2s:** Use AIARTU for tuition and FELSTI for stipend.
Revising budgets

There are three scenarios when you may need to revise a budget, such as either before or after a proposal has been awarded, or to move money from one cost element to another in project.

The three types of revised budgets are:

**Preaward Revision**: This Proposal Development proposal type should be used when the sponsor requests a revised budget before the proposal has been awarded.

**Revision of an Existing Award**: This Proposal Development proposal type should be used when the sponsor requests a revised budget after the proposal has been awarded and has been set up in PS Financials. For example, the sponsor has requested a revised budget for year 2 after already awarding year 1.

**Award Rebudget**: When money needs to be moved from one budget item to another in an already-awarded proposal that is already set up in PS Financials, but the total award amount remains the same and the sponsor approves of the rebudgeting. Fill out the ORPA OPAR and supporting Excel spreadsheet and send it to your GCA. Your GCA will review it and hand it off to the Award Specialist who will then update it in PS Financials.

**Preaward Revision**

When a sponsor asks for a revised budget after your proposal has been submitted, but before it has been awarded and set up in PS Financials, you will need to copy the submitted proposal development proposal before you can revise the budget. This applies to proposals that were originally entered as new, supplement or renewals:

1. Copy the existing proposal.
2. Open the copy in edit mode and change the *Proposal Type* to **Preaward Revision**.
3. If the proposal dates have changed, change them on the Proposal tab first before opening the budget.
4. Open the budget and modify the budget. If the proposal dates have changed, update the dates on the Budget Summary tab and say yes to sync the rates. If you had to set custom rates, reset them now.
5. Preaward Revisions will go through the approval map just like a new proposal, but will not create a new Institute proposal. When ORPA approves the budget, your ORPA rep enters the existing IP number. That IP number will be updated by Coeus to contain a new sequence for the revised budget. Therefore, one or more Coeus Proposal Development proposals will be linked to one Coeus Institute Proposal.

**Revision of an Existing Award**

How to create and submit a Revision of an Existing Award:

- Start a new proposal.
- Select “Revision of an Existing Award” as the Proposal Type
- Enter the PS Award number for the existing award on the Other tab.
- The start and end dates for the proposal and the budget should be for the period of the budget that needs to be changed, not for the entire budget. For example, if the proposal is a 3 year
budget and the sponsor is asking for a revised budget for year 2, the start and end dates should be for year 2 only.

- Enter the budget information for the years that need to be revised.
- Submit the proposal. The proposal will go directly to ORPA for approval and will not go through the departmental approval process again.
- When the ORPA rep approves the proposal, the Revision of an Existing Award will have a new Institute Proposal number.
Appendix A: Budget endlessly spinning or returning “could not fetch data from server after calculation” error

Here’s the streamlined workaround as of 2/24/17

1. Open your budget.
2. Add a new row, add a budget item, and add the amount.
4. Repeat steps 2 and 3 until it starts spinning. Then you will know exactly which line it doesn’t “like” because you saved after every row.
5. After it stops spinning, change the amount for that row to $0, add a new row and continue on.

We’ve had one case so far where it didn’t like two lines in a row!

What if Coeus never stops spinning?

It can take a few minutes for Coeus to stop spinning and return the error message, but if it just doesn’t want to stop spinning:

1. Close Coeus via the Task Manager on your computer
   a. On Windows, press the ctrl, alt and delete buttons on your keyboard all at the same time.
   b. Click “Start Task Manager”
   c. In the Applications tab, click on Coeus and then click End Task.
2. Launch Coeus again
3. You’ll have to unlock your proposal
   a. Click on the File menu
   b. Click on Current Locks
   c. Click on the proposal number so the row is blue.
   d. Press “Unlock” on the right side.
   e. If your proposal is listed more than once, repeat for each row.
4. Open your proposal in Edit mode
5. Open your budget in Edit mode.
6. Try the workaround above.

More details from 8/4/16:

I’m sorry this document is so long, but if your proposal budget is endlessly spinning and/or returning an error message, it will help you.

The issue: For unknown reasons, Coeus may start spinning while you’re working on a proposal budget and adding or changing personnel amounts or personnel budget items. This is a recent development. It can occur with either the red baron or the basic “enter the amount in the cost box” method. When you press ok or save, Coeus will start spinning and not actually save. It may return a “Could Not Fetch Data From Server After Calculation” error message or it might just stop spinning, eventually after several minutes. If it never stops spinning, you’ll have to close Coeus through the Task Manager.
The workaround:

I’ve isolated the issue to the line that you are working on when the spinning begins. It seems this line becomes corrupted and cannot be fixed.

In one case, the user was trying to change the cost element on line 9 of a 23 line budget from SALGS to SALADM, pressed save, then the spinning occurred. The workaround: Just leave line 9 there as SALGS with no amt filled in. Then add a new line as SALADM and save. Add the amount on that new line and save. Then delete the old line 9 and save.

In another case, the user was trying to add a line as the last budget line 6 as SALOS, then used the red baron, and got the spinning after clicking OK on the red baron window. The workaround: leave budget line 6 there as SALOS with no amt filled in. Add a new line 7 as SALOS, use the red baron to specify dates, % charged/% effort, press OK and click save. Then delete the old line 6 and press save.

Also recommended:

When you initially generate all budget periods, press save and exit the budget, then go back into the budget in Modify mode.

Save frequently.

What if you like keeping all your personnel grouped together at the top of your budget?

You would still leave the corrupted line as-is. Click on the row under the corrupted line so that it’s highlighted. Then click on the Items menu> Insert Line Item. Add your cost element and cost to that new inserted line, press save, then delete the corrupted line and save.

MIT/Coeus Consortium cannot figure out this issue and no other Coeus school is having this issue.

Thanks for your patience; I know it’s frustrating!