

RAMP – Research Administration Management Portal

How to Enter Budgets for INDUSTRY-SPONSORED Clinical Trials

This reference is for Industry-Sponsored Clinical Trials. For all Federal, and Federal flow-through Clinical Trials, full budgets must be included in the Funding Proposal record. See “[How to Create a Funding Proposal Budget](#)” reference.

ENTERING ESTIMATES ON THE FUNDING PROPOSAL

Security Role(s): All

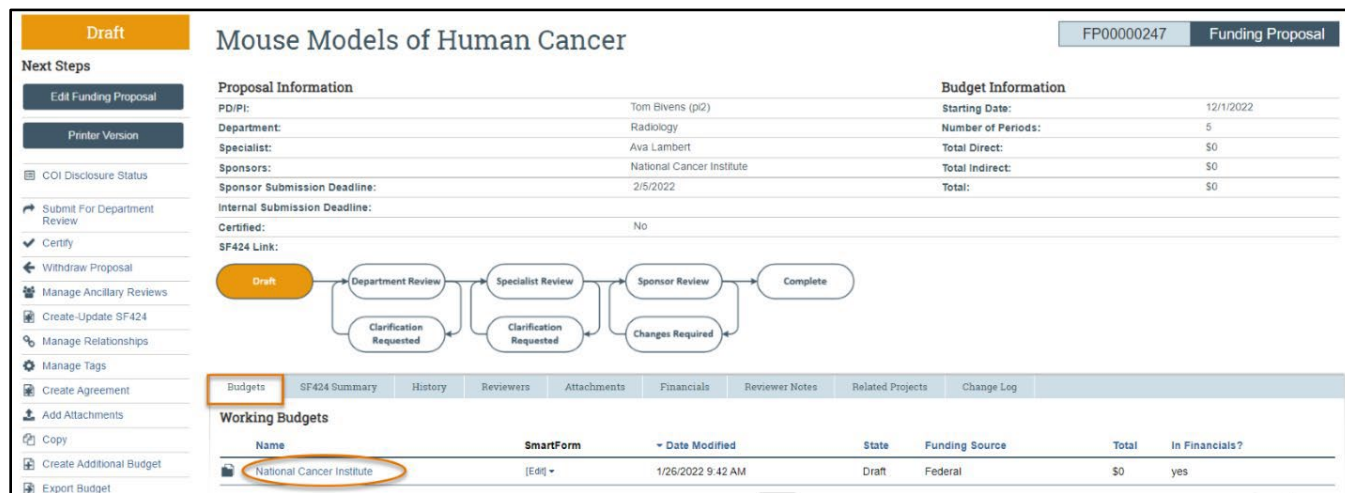
While complete categorized budgets are not required in RAMP for clinical trial agreements, it is important to capture the total estimated value of the agreement for reporting purposes. After the proposal has been created, the system automatically creates a budget record with the name of the direct sponsor which can be leveraged for this purpose.

To estimate the total estimated value to be entered into RAMP, an amount should be calculated that includes per patient costs assuming full enrollment for the trial, as well as any start-up costs or other costs associated with conducting the clinical trial. A high degree of precision is not expected, though a reasonable estimate is needed and will be entered into the Budgets tab in RAMP.

NOTE: Before updating the Budget, be certain that the Budget Period on the FP record is the estimated Start Date and Period end date = 12/31/2099

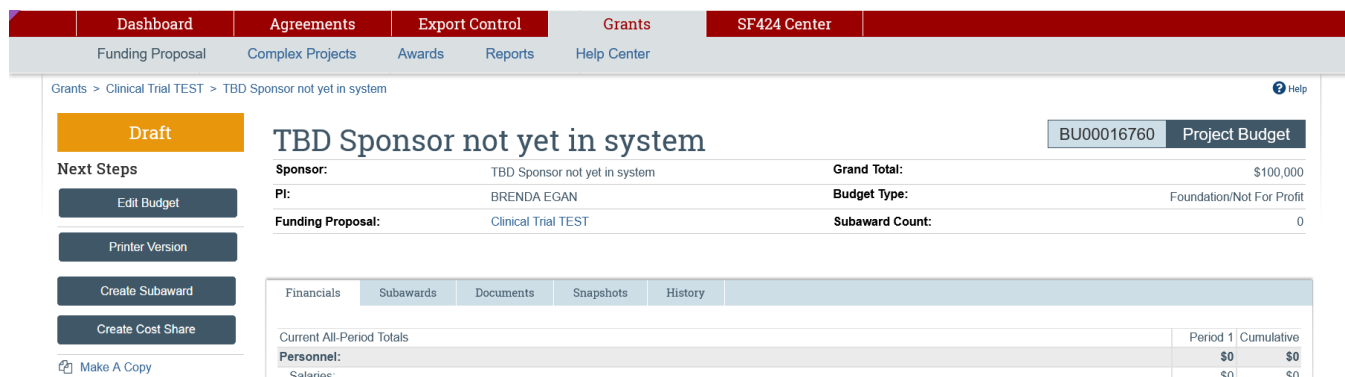
Preliminary Steps

1. Navigate to the Proposal Workspace. You will automatically be brought to the Workspace when you select **Finish** on the Proposal SmartForm.



The screenshot shows the 'Draft' workspace for a funding proposal titled 'Mouse Models of Human Cancer' (FP00000247). The interface includes a sidebar with 'Next Steps' (Edit Funding Proposal, Print Version, COI Disclosure Status, Submit For Department Review, Certify, Withdraw Proposal, Manage Ancillary Reviews, Create/Update SF424, Manage Relationships, Manage Tags, Create Agreement, Add Attachments, Copy, Create Additional Budget, Export Budget) and a main content area. The main content area has tabs for 'Budgets', 'SF424 Summary', 'History', 'Reviewers', 'Attachments', 'Financials', 'Reviewer Notes', 'Related Projects', and 'Change Log'. The 'Budgets' tab is active, showing a 'Working Budgets' table with one entry: 'National Cancer Institute' (SmartForm: [Edit], Date Modified: 1/26/2022 9:42 AM, State: Draft, Funding Source: Federal, Total: \$0, In Financials?: yes). Above the table, there is a 'Proposal Information' section with fields for PDI/PI (Tom Rovens (p2)), Department (Radiology), Specialist (Ava Lambert), Sponsors (National Cancer Institute), Sponsor Submission Deadline (2/5/2022), Internal Submission Deadline, and Certified (No). To the right is a 'Budget Information' section with fields for Starting Date (12/1/2022), Number of Periods (5), Total Direct (\$0), Total Indirect (\$0), and Total (\$0). A workflow diagram shows the process from 'Draft' to 'Complete' through 'Department Review', 'Specialist Review', and 'Sponsor Review', with 'Clarification Requested' and 'Changes Required' loops.

- On the Proposal Workspace, under the Budgets tab, select the **budget name** to display the Budget Workspace.



The screenshot shows the 'Budget Workspace' for a budget titled 'TBD Sponsor not yet in system'. The interface includes a top navigation bar with tabs like Dashboard, Agreements, Export Control, Grants, and SF424 Center. A left sidebar contains buttons for Draft, Next Steps, Edit Budget, Printer Version, Create Subaward, Create Cost Share, and Make A Copy. The main content area displays budget details: Sponsor (TBD Sponsor not yet in system), PI (BRENDA EGAN), Funding Proposal (Clinical Trial TEST), Grand Total (\$100,000), Budget Type (Foundation/Not For Profit), and Subaward Count (0). Below this is a 'Financials' tab with sub-tabs for Subawards, Documents, Snapshots, and History. A table shows 'Current All-Period Totals' for Personnel (\$0) and Salaries (\$0).

- On the Budget Workspace, select the **Edit Budget** button to open the Budget SmartForm.

Section 1: General Budget Information Page

- Budget title** – Edit the display name of the budget to better identify the sponsor or the budget's content if necessary.
- For industry- funded trials: Does this budget use the standard F&A cost base and rates?** – Select **No**.
- A second **Non-standard F&A cost base and rates** table displays to specify a different cost rate. When entering rates, enter the value in the first field. Select the appropriate F&A cost base, which for industry-sponsored clinical trials will be **TDC**.

Enter the appropriate indirect cost rate for this clinical trial based on funding source. Refer to <https://rsp.wisc.edu/rates/>.

3. **Does this budget use the standard research indirect cost base and rates?**

☐ Yes ☒ No [Clear](#)

Standard F&A cost base and rates

	1
F&A Cost Base	1/1/2024 12/31/2099
MTDC	55.5%

Non-standard F&A cost base and rates

	1	
F&A Cost Base	1/1/2024 12/31/2099	
TDC	30%	Clear

- Will you require detailed budget tables for this budget submission?** – Select **No** for both **Travel** and **Participant Support Costs**.
- Include in consolidated budgets?** – Select **Yes**.

6. **Salary Cap** – Leave blank.
7. **Enter Inflation Rates** – Leave as 0.

Sections 2 & 3: Personnel Cost Definition and Personnel Costs

Leave these SmartForm pages blank. If **Personnel costs** exist on the **Personnel Cost Definition** page, delete.

Section 4: General Cost Definition

On this page you'll enter one line item to capture the potential value of the clinical trial agreement.

IMPORTANT: To keep the data entry simple, you will enter the total potential value as Direct Costs. Select **OK** in 7 (instead of **OK** and **Add Another**) and proceed to Section 5, Step 1.

1. Select the **Add** button to add a new cost type.
2. **General cost type** – Select **Other Direct Costs (no IDC)** from the drop down menu.
3. **Cost** – Enter the total potential value of the clinical agreement.
4. **Description** – Enter additional information about the cost type.

- EX: "Total costs include per patient costs for X (#) of patients, costs to conduct study, and overhead/F&A."

5. **Apply inflation?** – Answer **No**. By answering **No**, the amounts will be editable on the next page.

6. **Include in indirect calculations?** – Answer

When complete, select **OK**.

Section 5: General Costs

This page consists of a Budget Summary table and General Costs table that contains a row for each type listed on the prior page.

1. The **Budget Summary** table should reflect total Direct and Indirect costs being proposed.

Add General Cost

1. * General cost type:

Other Direct Costs (no IDC) ▼

step

2. Cost:

\$100,000.00

3. Description:

EX: "Total costs include per patient costs for X (#) of patients, costs to conduct study, and overhead/F&A."

trial

4. Apply inflation?

☐ Yes ☒ No [Clear](#)

General Budget Information

General Budget Information

Financials

Personnel Cost Definition

Personnel Costs

General Cost Definition

General Costs

F&A Cost Overrides

Attachments

Attachments

Editing: BU00016760

No.

General Costs

Budget Summary

Period:	Period 1	Budget Totals
Start:	1/1/2024	
End:	12/31/2099	
Duration:	912.00	
General Total:	\$100,000.00	\$100,000.00
Direct Total:	\$100,000.00	\$100,000.00
Indirect Total:	\$0.00	\$0.00
Grand Total:	\$100,000.00	\$100,000.00

a cost

General Costs

Save	Period: 1/1/2024 Start: 12/31/2099 End: 912.00 Duration:
Cost Type: Other Direct Costs (no IDC)	\$100,000.00
Description: EX: "Total costs include per patient costs to conduct study, and overhead/F&A."	
General Cost Total:	\$100,000.00

the

1. General costs other notes:

EX: "Total costs include per patient costs for X (#) of patients, costs to conduct study, and overhead/F&A."

Section 8: Facility and Administrative (F&A) Cost Overrides Page

No data entry. **This page is for RSP use only.**

Section 9: Attachments Page

Attach the budget justification and other internal budget attachments here. For example, budget spreadsheet from Encore.

When the Budget SmartForm is complete, select the **Finish** button to return to the Budget Workspace.

ENTERING ESTIMATES ON THE FUNDING AWARD

Once the FX has been signed by both parties, the award will need to be setup with an account. Please refer to the RAMP award setup guidance for Clinical Trial setup:

[Research Administration Management Portal \(RAMP\) User Guide: Grants Award Module - Award Records, Award Setup, Award Modification Requests, and Award Modifications](#)