

# RAMP - Research Administration Management Portal

# How to Create a Funding Proposal Budget

Security Role(s): All of them - Every UW employee has basic access to create a proposal.

The next step in the proposal submission process is to access the Budget Workspace and complete the Budget SmartForm to build the proposal budget. After the proposal has been created, the system automatically creates a budget record with the name of the direct sponsor. Additional budgets may be created if necessary.

#### Preliminary Steps

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

Draft Next Steps	Mouse Models of Human Canc	er	FP00000247	Funding Proposal
	Proposal Information		Budget Information	
Edit Funding Proposal	PD/PI:	Tom Bivens (pi2)	Starting Date:	12/1/2022
Printer Version	Department:	Radiology	Number of Periods:	5
	Specialist:	Ava Lambert	Total Direct:	\$0
COI Disclosure Status	Sponsors:	National Cancer Institute	Total Indirect:	\$0
-	Sponsor Submission Deadline:	2/5/2022	Total:	\$0
<ul> <li>Submit For Department Review</li> </ul>	Internal Submission Deadline:	No		
✓ Certify	SF424 Link:	10		
Withdraw Proposal     Manage Ancillary Reviews	Druh Department Review Specialist Review	Sponsor Review Complete		
Create-Update SF424	Clarification			
𝕎 Manage Relationships	Requested Requested	Changes Required		
Manage Tags				
Create Agreement	Budgets SF424 Summary History Reviewers Attachm	ents Financials Reviewer Notes Related Project	s Change Log	
1 Add Attachments	Working Budgets			
Copy	Name SmartForm	- Date Modified State	Funding Source Total In	Financials?
Create Additional Budget	National Cancer Institute     [Edit] -	1/26/2022 9:42 AM Draft	Federal \$0 y	es
Export Budget				

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

Dashboard	Agreements	Grants	SF424 Center						
Funding Proposal	Complex Projects Awards	Reports Help Center	ər						
Grants > Mouse Models of Huma	n Cancer > National Cancer Institute								🕑 Help
Draft	National Can	cer Institute			B	U0000024	42	Project Bu	idget
Next Steps	Sponsor:	National Ca	incer Institute	Grand Total:					\$0
Edit Budget	PI:	Tom Bivens	(pi2)	Budget Type:					Federal
	Funding Proposal:	Mouse Mod	lels of Human Cancer	Subaward Cour	it:				0
Printer Version									
Create Subaward	Financials Subaward	Documents Snapshots	History						
Create Cost Share	Current All-Period Totals			Period 1	Period 2	Period 3	Period 4	Period 5 Cu	mulative
4	Personnel:			\$0	\$0	\$0	\$0	\$0	\$0
Make A Copy	Salaries:			\$0	\$0	\$0	\$0	\$0	SO

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





4. Complete the Budget SmartForm pages to build the budget in RAMP. The sections below walk you through each of the pages. Select **Continue** at the bottom of each page to navigate through the SmartForm pages (the final page has a Finish button instead of a Continue button).

## Section 1: General Budget Information Page

- 1. **Budget title** Edit the display name of the budget to better identify the sponsor or the budget's content if necessary. (Example: an internal subproject title should be edited to reflect the receiving division/department name.)
- 2. **Principal Investigator for this budget** This drop-down list contains only the names of those identified in the key personnel section of the proposal. Update as necessary. If the person is not listed, they will need to be added in the Personnel section of the proposal SmartForms to be selectable here.
- 3. Does this budget use the standard F&A cost base and rates? Select Yes if this budget will use the On-Campus Research F&A cost base and rates. Select No if the budget will use a different rate.
  - a. If **Yes**, the Standard On Campus Research F&A cost base and rates display in the table.
  - b. If No, a second Non-standard F&A cost
     base and rates table
     displays to specify a
     different cost rate (if
     appropriate). When
     entering rates, enter the
     value in the first field and
     use the arrow button to duplicate the value in
     all periods. Select the
     appropriate F&A cost
     base.

3.	* Does this bu	dget u	se the stan	idard res	earch indir	ect c	ost base and	d rates? 😧			
	Standard F&A	cost b	ase and rat	tes							
		Peri	od	1	7/4/000	2	3	7.4.0	4	7/4/000	5
	E&A Cost Base	End	L //	0/2025	6/30/202	0 6	6/30/2027	6/30/	2027	6/30/202	20
	MTDC	Rate	. 5	5.5%	55.59	6	55.5%	5	5.5%	55.5	%
		Aute	. 0	0.070	00.07	ч	00.070	0.	7.070	00.0	70
3.	* Does this bud Yes No C Standard F&A c F&A Cost Base	lget us lear cost ba Period Start: End:	e the standa se and rates 7/1/2 6/30/2	ard resea s	2 7/1/2025 6/30/2026	cost	3 7/1/2026 6/30/2027	4 7/1/2027 6/30/2028		5 7/1/2028 6/30/2029	
	Non-standard F	&A cos	st base and	rates	00.076		00.078	00.076		55.578	
			Period		1	2		3	4		5
			Start:	7/1/202	4 7/1	/2025	7/1/20	26 7	/1/2027	7/1/2	028
	F&A Cost Base		End:	6/30/202	5 6/30	/2026	6/30/20	27 6/3	30/2028	6/30/2	029
			Rate:								

- i. None Use when no indirect costs are calculated in the F&A base.
- ii. TDC Use when all budget categories are calculated in the F&A base, including NIFA proposals.
- iii. MTDC Use when the sponsor uses a modified total direct cost F&A base.





- iv. S&W Use when the sponsor specifies a salaries & wages F&A cost base.
- v. S&B Use when the sponsor specifies a salaries & fringe benefits F&A cost base.
- vi. S&S Do not use.
- vii. FEL Do not use.
- viii. NIH Training Grant Use for NIH NRSA and similar training grants.

**NOTE:** UW-Madison will not use the FEL or S&S cost bases.

**IMPORTANT:** RAMP does not allow a user to enter an indirect cost budget dollar value. If the proposal limits the indirect costs to a specific dollar value, calculate the necessary percentage to recover all costs and enter the relevant percentage.

- 4. Will you require detailed budget tables for this budget submission?
  - Select Yes if you need a detailed budget for either Travel or Participant support costs.
     Select No if you will enter Travel or Participant Support costs as a line item on the General Costs page or if your budget does not contain these budget categories.
  - b. Use the guidance below to determine if a Yes answer is appropriate.
    - i. Detailed Travel Budget: Select YES when you prefer to build a detailed travel budget based on the number of travelers and number of trips per period or when the sponsor requires detailed travel budgeting. Select NO if you prefer to enter your travel budget in a lump sum amount or if your budget does not include travel costs.
    - ii. Detailed Participant Support Costs Budget: This cost type maps to Section E on NIH SF424 budget pages and is for Participant Costs. Select YES for pre- and post-doctoral individual fellowships or when the R&R budget includes participant support costs (located in Section E of the budget form). Select NO for training grants, budgets that do not include participant support costs, or if you prefer to enter participant support costs in a lump sum amount.
  - c. If selecting Yes, refer to the Appendix of the <u>Funding Proposal User guide</u> (starting on page 83) for the detailed instructions for these additional SmartForm pages.

**NOTE**: Selecting Yes adds additional budget SmartForm pages to the overall set of SmartForm pages. Selecting No does not add additional budget SmartForm pages and users would instead add these costs to the General Costs page (this page is included for all budgets).

- 5. Include in consolidated budgets? Select Yes or No as appropriate.
  - a. If **Yes**, the budget will be included in the total proposal budget displayed in the Financials tab of the Proposal Workspace.





b. If **No**, the budget will be excluded from the total proposal budget displayed in the Financials tab of the Proposal Workspace. Select No if this is a draft budget that will not be used on the final proposal or if this is a cost share budget.

**NOTE**: Selecting Yes adds this budget's totals to the figures on the proposal's Financials tab. The totals of all budgets (except cost share or excluded budgets) get rolled up into one total per cost type on the SF424 budget.

- 6. Salary Cap This field may be automatically populated with the sponsor's salary cap. You can override the default salary cap by entering a new amount. Follow sponsor guidelines for salary caps. Salary cap overages do not need a cost share budget unless they are being reported to the sponsor as part of mandatory cost share.
- 7. Apply inflation rate to personnel costs? This question defaults to "Yes." Update as necessary. If you intend to apply inflation to salary costs for individuals at the salary cap, you will need to remove the salary cap in Question 6; otherwise, no inflation will occur in future years.
- 8. Enter inflation rates Update as necessary with the inflation rate for each budget category. Select the Inflate Period 1 box to apply the inflation rate to Period 1; otherwise, inflation will start with Period

# Section 2: Personnel Cost Definition Page

The personnel cost budget is calculated using information entered on two separate pages. This first page, Personnel Cost Definition, is for entering costs. The second page, Personnel Costs, is for entering amounts. The personnel budget also displays on the Personnel Costs page. Follow the steps below to build the list of personnel:

 Select the Import Proposal Personnel button to import the PI and all other institutional personnel listed on the proposal at one time.

Personnel Cost Definition 💡	
Go to additional personnel on funding proposal           1.         Import Proposal Personnel         D	
Personnel costs:	
+ Add	





- a. This action can only be completed once.
- b. If needed, select the Go to additional personnel on funding proposal link to return to the Personnel page of the Proposal SmartForm to add additional personnel to the proposal prior to using the Import Personnel button. When complete, navigate back to the Personnel Costs page of the Budget SmartForm and select the Import Proposal Personnel button.
- 2. If you need to add a person after you have completed the import, you will manually add them using the "Add" button and then select their name from the dropdown. Select the Add button to add personnel individually.
- 3. Select **Update** by each staff member name to view appointment and base salary information. Update if necessary.

Add Personnel Cost
1. Staff member: Staff Member To Be Determined
2. * Role:
▼
3. Appointment:
<ul> <li>A Budget summer and academic effort separately?</li> <li>Yes No <u>Clear</u></li> </ul>
5. Annualized salary:
6. Apply inflation rate: ● Yes ○ No <u>Clear</u>

4. Use the "Staff Member to Be Determined" value if the position is being budgeted, but the individual has not yet been identified.

When complete, each row of the table reflects the Appointment duration, Role, and whether the individual is Senior/Key Personnel.

### Section 3: Personnel Costs Page

This page consists of a Budget Summary table and a Personnel Costs table that contains a row for everyone listed on the prior page, which includes their salary, benefits costs, and total compensation.

Select the
 Show Effort
 button to
 show fields
 used to
 indicate the
 percentage of
 effort
 everyone will
 contribute to
 the project
 and the
 percent of the
 base salary
 required.

Personnel	Costs								
Budget Summar	у								
	Period 1 7/1/2024 6/30/2025	Period 2 7/1/2025 6/30/2026	Perio 7/1/2 6/30/2	od 3 2026 2027	Peri 7/1/2 6/30/2	od 4 2027 2028	Perio 7/1/20 6/30/20	d 5 028 Budget Totals 029	
Personnel Total: Direct Total: Indirect Total: Grand Total:	\$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00	\$ \$ \$ \$	0.00 0.00 0.00 0.00	\$ \$ \$ \$	0.00 0.00 0.00 0.00	\$0 \$0 \$0 \$0	.00 \$0.00 .00 \$0.00 .00 \$0.00 .00 \$0.00	
Personnel Costs	,			J(				I	
Show	Effort		Period 1 7/1/2024 6/30/2025		Period 2 7/1/2025 6/30/2026		Period 3 7/1/2026 6/30/2027	Period 4 7/1/2027 6/30/2028	Period 5 7/1/2028 6/30/2029
Person: Test PI (2) Role: PD/PI		Salary: Benefits: Total:	\$0.00 \$0.00 \$0.00		\$0.00 \$0.00 \$0.00		\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Person: Staff Member To Be Determined Role: Graduate Student		ned Salary: Benefits: Total:	\$0.00 \$0.00 \$0.00		\$0.00 \$0.00 \$0.00		\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Person: Staff Memb Role: Graduate Stud	er To Be Determi dent	ned Salary: Benefits: Total:	\$0.00 \$0.00 \$0.00		\$0.00 \$0.00 \$0.00		\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Salary Cost Total: Benefits Cost Total Personnel Cost Tot	: al:		\$0.00 \$0.00 \$0.00		\$0.00 \$0.00 \$0.00		\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00





2. Enter the applicable Effort and Salary Requested (Sal Req) months and modify the Fringe Benefits Rate if necessary. If you expect these values to remain consistent across all periods, select the small arrows to copy the values to the subsequent periods.

Personnel Costs						
Save	Period: Start: End: Duration:	Period 1 7/1/2023 6/30/2024 12.00	Period 2 7/1/2024 6/30/2025 12.00	Period 3 7/1/2025 6/30/2026 12.00	Period 4 7/1/2026 6/30/2027 12.00	Period 5 7/1/2027 6/30/2028 12.00
	Effort Mos.:	1.8	1.8 🖻	1.8 🖻	1.8 🖻	1.8
Person: Test PI (1) Role: PD/PI	Sal Req Mos.:	1.8	1.8	1.8	1.8	1.8
	FB Rate:	36.6 % 🕨	36.6 % 🕨	36.6 % 🕨	36.6 % 🕨	36.6 %
	Annualized Sal.: Monthly Rate:	\$250,000.00 \$20,833.33	\$250,000.00 \$20,833.33	\$250,000.00 \$20,833.33	\$250,000.00 \$20,833.33	\$250,000.00 \$20,833.33

3. Repeat this process for all personnel. When complete, select the **Save** to update the totals fields in both the Budget Summary and Personnel Costs tables.

#### General Notes about the Personnel Costs table:

- Use the Show Effort/Show Totals buttons to switch between the effort and dollar amount views.
- The Base salary is defined for each person on the Personnel Cost Definition page.
- Salary = Base \* Sal Req % (salary cap used instead of base if applicable)
- Benefits = Base \* Sal Req % \* FB Rate % (salary cap used instead of base if applicable)
- The Effort months and effort percentage reflects the effort for each person in the period and does not impact the calculations on the table (salary requested impacts the calculations as noted above).
- If the base salary is greater than the salary cap amount, the calculations will use the salary cap. UW-Madison does not require cost share budgets to be created for salary cap overage alone.

### Section 4: Travel Cost Definition and Travel Costs Pages

This page appears if you entered Yes to travel costs on Question 4 (Will you require detailed budget tables for this budget submission?) on the General Budget Information page.

Refer to the Appendix of the <u>Funding Proposal User guide</u> (starting on page 83) for instructions for these pages.

### Section 5: Trainee Cost Definition and Trainee Costs Pages

This page appears if you entered Yes to participant support costs on Question 4 (Will you require detailed budget tables for this budget submission?) on the General Budget Information page. The terms participant support costs and trainee costs are interchangeable in RAMP and in this guide,





Refer to the Appendix of the <u>Funding Proposal User guide</u> (starting on page 83) for instructions for these pages.

# Section 6: General Cost Definition Page

Gen	eral Cos	t Definition			
1. G	eneral cost	s:			
	+ Add				
		Cost Type	Description	Cost	
	ピ Update	Animal		\$9,000.00	8
	🕜 Update	Consultant Services		\$5,000.00	8
	🖸 Update	Materials and Supplies		\$25,000.00	0

On this page you'll enter line items for cost categories not entered on the detailed budget tables on prior pages. Like the Personnel Costs pages, the General Cost tables consist of two pages. The first page, General Cost Definition, is for entering cost line items by general cost type. The second page,

**General Costs**, is for updating the costs in all budget periods to calculate the total general costs. Select the **Add** button to add a new cost type and repeat as necessary. In the Add General Cost window, answer the following questions:

- 1. **General cost type** Select the type in the dropdown list.
- 2. **Cost** Enter the dollar amount per period.
- 3. **Description** Enter additional information about the cost type.
- 4. Apply inflation? Answer Yes or No. By answering No, the amounts will be editable on the next page. If answering Yes, this will apply inflation rate entered on the General Information page (even if 0% is entered) and future year budget amounts are not editable.

N	Add General Cost
You Are Here: 😭 BJB test for scre Editing: BU000001	1. * General cost type:
General Cost Defin	2. Cost:
1. General costs: + Add Cost Type	3. Description:
C Update Equipment	
Update Publication	4. Apply inflation? O Yes O No <u>Clear</u>
	5. Include in indirect calculations?

5. Include in indirect calculations? - Answer Yes or No. This question only displays for certain cost types. Do not change default answer unless sponsor solicitation/guidelines specifically require change. Default answers are driven by the indirect cost base.

When complete, select OK or OK and Add Another.





## Section 7: General Cost Page

This page consists of a Budget Summary table and a General Costs table that contains a row for each cost type listed on the prior page. Notice that the costs with inflation factored in are automatically promoted across all budget periods.

#### General Costs

Budget Summ	ary								
Period 1 1/1/2024           General Total:         \$47,000.00           Direct Total:         \$47,000.00           Indirect Total:         \$19,425.00           Grand Total:         \$66,425.00		Period 2 1/1/2025 12/31/2025	Period 1/1/202 12/31/202	3 Peri 26 1/1/: 26 12/31/:	Period 4 1/1/2027 12/31/2027		eriod 5 1/2028 1/2028	iod 5 /2028 Budget Totals /2028	
		\$47,000.00 \$47,000.00 \$19,425.00 \$66,425.00	\$47,000.0 \$47,000.0 \$19,425.0 \$66,425.0	0 \$47,00 0 \$47,00 0 \$19,42 0 \$66,42	0.00 0.00 5.00 5.00	\$47, \$47, \$19, \$66,	000.00 000.00 425.00 425.00	\$235,000.00 \$235,000.00 \$97,125.00 \$332,125.00	
General Costs			4					JL	
Save		Period 1 1/1/2024 12/31/2024	Period 2 1/1/2025 12/31/2025	Period 3 1/1/2026 12/31/2026		Period 4 1/1/2027 12/31/2027	1	Period 5 1/1/2028 2/31/2028	
Cost Type: Anima Description:	al	\$10,000.00	\$10,000.00	\$10,000.00		\$10,000.00	\$1	0,000.00	
Cost Type: Equip Description:micro	ment oscope	\$12,000.00	\$12,000.00	\$12,000.00		\$12,000.00		2,000.00	
Cost Type: Mater Description:	ials and Supplies	\$25,000.00	\$25,000.00	\$25,000.00		\$25,000.00	9	\$25,000.00	
General Cost Tot	al:	\$47,000.00	\$47,000.00	\$47,000.00		\$47,000.00	9	47,000.00	

1. Select the **hyperlink** associated with each

Cost Type to edit the Cost Type and the associated details listed for each Cost Type.

2. Select the **Save** button within the General Costs table after you have completed your edits.

**NOTE**: The general cost dollar amounts shown (Cost Type "Animal" and "Equipment") are editable because the "Apply inflation?" question in the Add General Cost window was answered as "no."

3. Enter any notes about the general costs in Question 1 and select **Continue**.

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

No data entry. **This page is for RSP use only.** This page reports the F&A cost base standard being used to calculate the F&A amount for this budget and if applicable, any overrides. RSP would use this page in the rare circumstance that a sponsor used a F&A base that is not already available in RAMP.



#### Section 9: Attachments Page

Attach the budget justification (if not an SF424 submission) and other internal budget attachments here. Attachments added here will also be available on the Funding Proposal Workspace. <u>These</u> attachments are not imported to the SF424; all SF424 budget attachments must be directly uploaded in the SF424 record. When the Budget SmartForm is complete, select the **Finish** button to return to the Budget Workspace.

Last Revised: 05/24/2023





On the Budget Workspace, the Financials tab reflects the categories and totals specified on the budget tables. Select the **Edit Budget** button to make additional budget updates.

Draft	DHHS, PHS, NATIONAL INSTITUTES OF HEALTH							BU0000	0316	Project Bu	udget	
ext Steps Sponsor: DHHS			NATIONAL INSTITUTE	S OF HEALTH			Grand T	otal:			\$96,376	
Edit Budget	PI: Buffy Beattie					Budget	Туре:			Federa		
	Funding Proposal:		e fo FP#1 script				Subawa	rd Count:		1		
Printer Version												
Create Subaward	Financials Subaward	s Documents	Snapshots His	tory								
Create Cost Share	Current All-Period Totals					Period 1	Period 2	Period 3	Period 4	Period 5 Cu	umulative	
	Personnel:					\$0	\$0	\$0	\$0	\$0	\$0	
Make A Copy	Salaries:					\$0	\$0	\$0	\$0	\$0	\$0	
Log General Comments	Benefits:					\$0	\$0	\$0	\$0	\$0	\$0	
Ph. Evenent Rundmet	General:					\$0	\$0	\$0	\$0	\$0	\$0	
Export Budget	Travel:					\$0	\$0	\$0	\$0	\$0	\$0	
A Manage Tags	Animal Casto					0.0	60	60		<b>e</b> 0	60	

### Section 9: How to Input Academic and Summer Salary Faculty

No special data entry is needed. RAMP maps personnel with both academic and summer salary to one line so the person does not need to be listed on two lines on the SF424 budget. Salaries are loaded to RAMP from the UW-Madison human resources system and salaries for personnel with academic year appointments is annualized to allow the salary calculations for academic and summer salary to be correct.

RAMP allows separate budgeting for summer and academic effort. Follow the steps below to separate summer and academic effort:

- 1. Navigate to the Personnel Cost Definition page of the budget.
- 2. Select **Update** next to the name of the staff member requiring separate summer and academic effort budgeting.

🕜 Update

3. In the Edit Personnel Cost window, select **Yes** to Question 4 "Budget summer and academic effort separately" and select **OK** to close the window.

