

# Guide to the Budget Worksheet for Pre-ERA Planning

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The Excel [Budget Worksheet](#) is available for planning purposes prior to creating the Funding Proposal and related Budget(s) in ERA. These include current rates and apply modified total direct costs (MTDC) calculation rules.

When using a Worksheet, download a copy and save it locally for your immediate use. Remember to return to the [website](#) to download the latest version when you start a new budget, as rates may have changed. Always work with the latest version posted.

The Budget Worksheet opens on the tab titled Spreadsheet. Before you begin entering information, **be sure** to click Enable Content (macros) at the top of the page. If using the Worksheet for less than the stated period of time (e.g. less than five-years), be mindful to zero out the years you won't be using to ensure there are no surprises throwing off your final budget totals!

The screenshot displays the Microsoft Excel interface for the 'Three Year Budget Template\_for guide'. A yellow security warning bar at the top states 'Some active content has been disabled. Click for more details.' and includes a red-circled 'Enable Content' button. The spreadsheet is titled 'PROPOSAL BUDGET' and contains several key sections:

- PROPOSAL BUDGET Summary:** Includes fields for Start Date, End Date, PI Name, PI e-mail, and PI Phone. A note indicates that start dates 6 months or more into a fiscal year will use the following year's rates.
- 1.A. SALARIES, WAGES, BENEFITS & INS:** A detailed table for faculty salaries. It includes columns for 'Faculty Salaries', 'Co-PI', and 'Total Salary & ERE'. Rows specify 'AY Salary', 'AY LOE Yr 1', 'Sum LOE Yr 1', and 'Total LOE Yr 1' for each category. The table is organized into columns for 'Year 1', 'Year 2', and 'Year 3', with a 'Summary' column for '36 mos'. A 'Total Salary' row is highlighted in yellow at the bottom of each section.

The bottom of the screenshot shows the Excel taskbar with tabs for 'Budget Summary', 'Spreadsheet', 'Cost Share Summary', 'Cost Sharing', and 'FY RID & IIA Calculator'. The 'Spreadsheet' tab is active, and a red arrow points to it from the page footer.

Note that there is a Budget Summary tab to the left which pulls in line items by year/total from the Budget Worksheet.

The screenshot displays the Microsoft Excel interface for a 'Three Year Budget Template\_for guide'. The active worksheet is 'Budget Summary'. The ribbon shows the 'Home' tab with various formatting options. The worksheet grid contains the following data:

				Year 1	Year 2	Year 3	Summary
<b>Senior Personnel</b>							
PI:	Yr 1	0.00	P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0.00	P-Mos per year				
	Yr 3	0.00	P-Mos per year				
Co-PI:	Yr 1	0.00	P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0.00	P-Mos per year				
	Yr 3	0.00	P-Mos per year				
Co-PI:	Yr 1	0.00	P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0.00	P-Mos per year				
	Yr 3	0.00	P-Mos per year				
Co-PI:	Yr 1	0.00	P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0.00	P-Mos per year				
	Yr 3	0.00	P-Mos per year				
Co-PI:	Yr 1	0.00	P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0.00	P-Mos per year				
	Yr 3	0.00	P-Mos per year				
<b>Total Senior Personnel</b>				\$0	\$0	\$0	\$0
<b>Other Personnel*</b>							
Post Doctoral Associate	Yr 1	0	@ 0.00 P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0	@ 0.00 P-Mos per year				
	Yr 3	0	@ 0.00 P-Mos per year				
Staff	Yr 1	0	@ 0.00 P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0	@ 0.00 P-Mos per year				
	Yr 3	0	@ 0.00 P-Mos per year				
Staff	Yr 1	0	@ 0.00 P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0	@ 0.00 P-Mos per year				
	Yr 3	0	@ 0.00 P-Mos per year				
Administrative Staff	Yr 1	0	@ 0.00 P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0	@ 0.00 P-Mos per year				
	Yr 3	0	@ 0.00 P-Mos per year				
Grad Students - PhD	Yr 1	0	@ 0.00 P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0	@ 0.00 P-Mos per year				
	Yr 3	0	@ 0.00 P-Mos per year				
Grad Students - MS	Yr 1	0	@ 0.00 P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0	@ 0.00 P-Mos per year				
	Yr 3	0	@ 0.00 P-Mos per year				
Hourly Students	Yr 1	0	@ 0.00 P-Mos per year	\$0	\$0	\$0	\$0
	Yr 2	0	@ 0.00 P-Mos per year				

There is also a Cost Sharing tab and a related Cost Sharing Summary tab. When using these, be careful to review sponsor guidelines as to which expenditure categories are allowed to count as cost sharing. These cost sharing pages have the same functionality as the Budget Worksheet and Budget Summary.

The screenshot displays a Microsoft Excel spreadsheet titled "COST SHARING BUDGET". The spreadsheet is organized into several sections, each representing a different category of staff or students. The columns represent years (Year 1, Year 2, Year 3) and a Summary column. The rows include salary information, LOE (Line of Effort) in person months, and the number of staff or students. The spreadsheet is color-coded, with yellow for totals and green for sub-totals. The "ASU ARIZONA STATE UNIVERSITY" logo is visible in the background. The Excel interface shows the ribbon with "Home", "Insert", "Page Layout", "Formulas", "Data", "Review", "View", "Developer", and "Add-Ins" tabs. The status bar at the bottom shows "Ready" and a zoom level of 85%. Two red arrows point to the "Cost Share Summary" and "Cost Sharing" tabs in the bottom navigation bar.

	Year 1	Year 2	Year 2	Year 3	Year 3	Summary
<b>Administrative Staff</b>						
FY Salary:	\$0	\$0	\$0	\$0	\$0	\$0
AY LOE Yr 1 =	0.00 person months					
Sum LOE Yr 1 =	0.00 person months					
Total LOE Yr 1 =	0.00					
# of AY stdts =	0.0					
# of sum stdts =	0.0					
<b>Sub-TOTAL Salary=</b>	\$0	\$0	\$0	\$0	\$0	\$0
<b>Sub-TOTAL Staff Salaries</b>	\$0	\$0	\$0	\$0	\$0	\$0
<b>Graduate Research Assistants</b>						
AY Salary:	\$0	\$0	\$0	\$0	\$0	\$0
AY LOE Yr 1 =	0.00 person months					
Sum LOE Yr 1 =	0.00 person months					
Total LOE Yr 1 =	0.00					
# of AY stdts =	0.0					
# of sum stdts =	0.0					
<b>Sub-TOTAL Salary=</b>	\$0	\$0	\$0	\$0	\$0	\$0
<b>Sub-TOTAL GRA Salaries</b>	\$0	\$0	\$0	\$0	\$0	\$0
<b>Hourly Students</b>						
AY Salary:	\$0	\$0	\$0	\$0	\$0	\$0
AY LOE Yr 1 =	0.00 person months					
Sum LOE Yr 1 =	0.00 person months					
Total LOE Yr 1 =	0.00					
# of AY stdts =	0.0					
# of sum stdts =	0.0					
<b>Sub-TOTAL Salary=</b>	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Salary &amp; ERE</b>	\$0	\$0	\$0	\$0	\$0	\$0

There is also a Fiscal Year RID Distribution Calculator on the last tab.

**FISCAL YEAR RID DISTRIBUTION CALCULATOR**

PI RECOGNITION INFORMATION (FROM FORM 300B)

Agency/Org or Proposal Number:

Enter Information in the blue-tinted cells only

Line #	Investigator	Unit/Department	Center	REC	RID	IIA
1	PI:					
2	Co-PI:					
3	Co-PI:					
4	Co-PI:					
5	Co-PI:					
6				0	0	0
7				0	0	0
8				0	0	0
9				0	0	0
10				0	0	0
11				0	0	0
12				0	0	0
13				0	0	0
14				0	0	0
15				0	0	0
16				0	0	0
17				0	0	0
18				0	0	0
19				0	0	0
20				0	0	0
21				0	0	0
<b>Total Allocation (must = 100)</b>				<b>0</b>	<b>0</b>	<b>0</b>

ALLOCATION INFORMATION

RID ALLOCATION PERCENTS TO BUSINESS UNITS

"Center" Allocation Percent (default is

Budget Summary | Spreadsheet | Cost Share Summary | Cost Sharing | **FY RID & IIA Calculator**

# ABOUT THE RATES USED IN THE BUDGET WORKSHEET

## Facilities and Administrative Costs (F&A)

The default F&A rate used is the approved rate for on-campus research. If a different approved F&A rate is to be used, modify it in the Facilities & Administrative Costs section below Total Direct Costs (See [F&A Modifications](#)). Click on Cell B164 to display the dropdown menu. The F&A [wizard](#) will assist you in determining the correct F&A rate for your proposal. The Budget Worksheets are updated regularly to ensure that budgets accurately reflects anticipated costs.

The screenshot shows the Microsoft Excel interface with the 'Three Year Budget Template\_for guide' open. The worksheet is titled 'On Campus Research'. The 'FACILITIES & ADMINISTRATIVE COSTS (F&A)' section is highlighted in yellow. Cell B164 is circled in red, and its dropdown menu is open, showing the following options:

- On Campus Research
- Off Campus Instruction
- Off Campus Other Sponsored Activity
- Off Campus Research
- On Campus Instruction
- On Campus Other Sponsored Activity
- On Campus Research

The worksheet also includes a table for 'TOTAL DIRECT COSTS' and 'TOTAL FACILITIES & ADMINISTRATIVE COSTS (F&A)'. The 'TOTAL DIRECT COSTS' table has columns for Year 1, Year 2, Year 3, and Summary. The 'TOTAL FACILITIES & ADMINISTRATIVE COSTS (F&A)' table has columns for Year 1, Year 2, Year 3, and Summary. The 'TOTAL PROJECT COSTS' row shows a total of \$0 for all years and the summary.

## Employee-Related Expenses (ERE) and Tuition Rates

At the top of the Budget Worksheet, start and end dates are entered in rows 1 and 2. After the project dates are entered, be sure to click the green button immediately below. This macro automatically updates the Worksheet so that the ERE and tuition rates for the corresponding fiscal year(s) are used throughout.

- If a start date is 6 months or more into a fiscal year, the Budget Worksheet will calculate amounts using the following year's rates in order to accurately reflect anticipated actual costs.
- ERE rates in out years are based on ASU Finance projected rates.
- Tuition rates in out years escalate by 8%.

PROPOSAL BUDGET													
1	PROPOSAL BUDGET	Start Date:	2/1/2014	Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.						ASU ARIZONA STATE UNIVERSITY			
2	Year 1 Total =	End Date:	1/31/2016										
3	Summary Budget =	Click to Update ERE/Tuition Rates											
4	Total Years =	PI Name:	Paul Irving	Sponsor:	NSF	Year 1	Year 2	Year 2	Year 3	Year 3	Summary		
5	1. DIRECT COSTS	PI e-mail:	paul.irving@asu.edu	PI Phone:	XXX-XXXX	1.03	Salary Escalation	1.03	Salary Escalation	1.03	36 mos		
6	1.A. SALARIES, WAGES, BENEFITS & INS												
7	Faculty Salaries	/mos	# mos	% effort		# mos	% effort		# mos	% effort			
9	PI:	AY Salary:	\$0	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0
10	AY LOE Yr 1 =	0.00 person months											
11	Sum LOE Yr 1 =	0.00 person months											
12	Total LOE Yr 1 =	0.00											
13	Count =	0											
14		SUB-TOTAL Salary=		\$0	AY LOE =	0.00	\$0	AY LOE =	0.00	\$0	\$0		
14		ERE		\$0	Sum LOE =	0.00	\$0	Sum LOE =	0.00	\$0	\$0		
15		Total Salary & ERE		\$0	LOE =	0.00	\$0	LOE =	0.00	\$0	\$0 Total Salari		

A Tuition Remission Rates table is found at the bottom of the Budget Worksheet that details Academic Year, Summer and Total rates:

TUITION REMISSION RATES					
171	TUITION REMISSION RATES	FY2014	FY2015	FY2016	
172	AY	\$13,792	\$14,895	\$16,087	
173	Summer	\$897	\$969	\$1,046	
174	Total	\$14,689	\$15,864	\$17,133	
175					
176	ERE Rates: By clicking the button at cell C3-E3 the ERE rates update automatically based on the start date entered. The rates used for out years are escalated by 3%.				
177	Tuition Rates: By clicking the button at cell C3-E3 the tuition rates update automatically based on the start date entered. The rates used for out years are escalated by 8%.				
178	F&A Rates: If you need to change the rate to one of the approved negotiated rates, select the drop down in cell B164.				
179					

# Salary Escalation

Per ASU policy, a 3% salary escalation is built in beginning with Year 1 (see line 5). The escalation factor may be removed in Year 1, for example, when hiring a new employee, or in all years when the sponsor has a written policy prohibiting salary escalation. If you have a situation you feel warrants removing the salary escalation, please speak with your assigned GCO during proposal preparation.

The screenshot displays a Microsoft Excel spreadsheet titled "Three Year Budget Template\_for guide". The interface shows the ribbon with tabs for File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, and Add-Ins. The active cell is H5, containing the value 1.03. The spreadsheet is organized into columns for years and summary data. Key sections include:

- PROPOSAL BUDGET:** Start Date: 2/1/2014, End Date: 1/31/2016. A note states: "Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates." A button "Click to Update ERE/Tuition Rates" is present.
- 1. DIRECT COSTS:** PI Name: Paul Irving, PI e-mail: paul.irving@asu.edu, Sponsor: NSF, PI Phone: 760.288.0000. An arrow points from the PI Phone field to cell H5 (1.03).
- 1.A. SALARIES, WAGES, BENEFITS & INS:** This section is expanded to show a table for Faculty Salaries and Co-PI. The table has columns for /mos, # mos, % effort, and salary/LOE values for Year 1, Year 2, and Year 3. A yellow callout box notes: "Annual escalation factor for salaries and wages." with the value 1.03.
- Summary:** 36 mos, Add Faculty button.

The bottom of the spreadsheet shows navigation tabs: Budget Summary, Spreadsheet, Cost Share Summary, Cost Sharing, and FY RID & IIA Calculator. The status bar at the bottom indicates "Cell H5 commented by A satisfied Microsoft Office user" and a zoom level of 85%.

# CREATING A DRAFT PROPOSAL BUDGET

Begin on the tab titled Spreadsheet. At the top of Columns C-G, enter the following:

- Start & end dates for proposed project
- The PI's name
- The Sponsor's name
- Click Update ERE/Tuition Rates button
- The PI's e-mail
- The PI's phone number

The screenshot shows a spreadsheet titled "PROPOSAL BUDGET" for Arizona State University. The top section contains project details: Start Date (2/1/2014), End Date (1/31/2016), PI Name (Paul Irving), PI e-mail (paul.irving@asu.edu), Sponsor (NSF), and PI Phone (XXX-XXXX). A red circle highlights these fields and a green button labeled "Click to Update ERE/Tuition Rates". The spreadsheet is organized into columns for Year 1, Year 2, and Year 3, with a Summary column. Rows include "1. DIRECT COSTS", "1.A. SALARIES, WAGES, BENEFITS & INS", and "Faculty Salaries". The Faculty Salaries section includes sub-totals for Salary and ERE (Equipment Rental Expense) for each year. The bottom of the spreadsheet shows a navigation bar with tabs for "Budget Summary", "Spreadsheet", "Cost Share Summary", "Cost Sharing", and "FY RID & IIA Calculator".

	Year 1	Year 2	Year 3	Year 3	Summary
PROPOSAL BUDGET					
Year 1 Total =	\$0				
Summary Budget =	\$0				
Total Years =	2.00				
1. DIRECT COSTS					
1.A. SALARIES, WAGES, BENEFITS & INS					
Faculty Salaries					
PI:					
AY Salary:	\$0	\$0	\$0	\$0	\$0
AY LOE Yr 1 =	0.00 person months				
Sum LOE Yr 1 =	0.00 person months				
Total LOE Yr 1 =	0.00				
Count =	0				
SUB-TOTAL Salary =	\$0	\$0	\$0	\$0	\$0
ERE	\$0	\$0	\$0	\$0	\$0
Total Salary & ERE	\$0	\$0	\$0	\$0	\$0
Co-PI:					
AY Salary:	\$0	\$0	\$0	\$0	\$0
AY LOE Yr 1 =	0.00 person months				
Sum LOE Yr 1 =	0.00 person months				
Total LOE Yr 1 =	0.00				
Count =	0				
SUB-TOTAL Salary =	\$0	\$0	\$0	\$0	\$0
ERE	\$0	\$0	\$0	\$0	\$0
Total Salary & ERE	\$0	\$0	\$0	\$0	\$0
Co-PI:					
AY Salary:	\$0	\$0	\$0	\$0	\$0
AY LOE Yr 1 =	0.00 person months				
Sum LOE Yr 1 =	0.00 person months				
Total LOE Yr 1 =	0.00				
Count =	0				
SUB-TOTAL Salary =	\$0	\$0	\$0	\$0	\$0
ERE	\$0	\$0	\$0	\$0	\$0
Total Salary & ERE	\$0	\$0	\$0	\$0	\$0
Co-PI:					
AY Salary:	\$0	\$0	\$0	\$0	\$0
AY LOE Yr 1 =	0.00 person months				
Sum LOE Yr 1 =	0.00 person months				
Total LOE Yr 1 =	0.00				
Count =	0				
SUB-TOTAL Salary =	\$0	\$0	\$0	\$0	\$0
ERE	\$0	\$0	\$0	\$0	\$0
Total Salary & ERE	\$0	\$0	\$0	\$0	\$0

# 1. Direct Costs

## 1.A. Salaries, Wages, Benefits & Insurance

### Faculty Salaries

#### PI

- Enter PI's name in Column A (this will allow the name to autofill on the Budget Summary).
- Enter PI's Academic (AY) Salary. The Budget Worksheet will then calculate the Monthly Rate (\$/mos over 9 months).
  - This cell's formula can be modified if the PI has a 12-month appointment, becoming: =ROUND(D9/12,2)\*\$H5.

E9		=ROUND(D9/9,2)*\$H5					
A	B	C	D	E	F	G	H
1	<b>PROPOSAL BUDGET</b>	Start Date: 2/1/2014			Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.		<b>ASU</b>
2	Year 1 Total =	\$0	End Date: 1/31/2016				<b>Year 1</b>
3	Summary Budget =	\$0	Click to Update ERE/Tuition Rates				
4	Total Years =	2.00	PI Name: Paul Irving		Sponsor: NSF		
5	<b>1. DIRECT COSTS</b>		PI e-mail: paul.irving@asu.edu		PI Phone: XXX-XXXX		1.03
6	<b>1.A. SALARIES, WAGES, BENEFITS &amp; INS</b>						
7			/mos	# mos	% effort		
8	<b>Faculty Salaries</b>						
9	PI: Paul Irving	AY Salary: \$85,000	\$9,728	0.00	0.000%		\$0
10	AY LOE Yr 1 =	0.00 person months					
11	Sum LOE Yr 1 =	0.00 person months	\$9,728	0.00	0.000%		\$0
12	Total LOE Yr 1 =	0.00					
13	Count =	0				SUB-TOTAL Salary=	\$0
14						ERE	\$0
15						<b>Total Salary &amp; ERE</b>	<b>\$0</b>

- If the PI is not a faculty member, but rather executive or service professional staff, the ERE rate used must be changed. Contact [RAHelp@asu.edu](mailto:RAHelp@asu.edu) for assistance, as modification will be required in several sections.
- To the right of the Monthly Rate, enter the number of months (#mos) the PI is working during the Academic Year (AY) and/or the Summer (Sum).
- Enter the Percentage of Effort (% effort) to be worked on the project (remember that one should not enter 100%, rather 95% or 90%, as faculty have other duties within any given time period corresponding to their academic responsibilities).
- The Budget Worksheet will now calculate the SUB-TOTAL Salary for Year One, and the corresponding ERE (the cell's formula references the faculty ERE rate listed below the Salaries & Wages section of the Worksheet).
- Return to the left of this section and in Column B enter the Count = 1.
- The Budget Worksheet will calculate the person months in the cell immediately above based on the # mos and the % effort entered. **NOTE:** This will be true for other salary lines as well.

- For all salary lines, out years are autopopulated with the same number of months and percentage of effort as in Year 1. If this will be different in the out years, you will need to update them. Or you can zero them out at this point and reenter when you enter each year's budget. (In this example, year 3 has been zeroed out as this is a two-year budget.)

J11		=G11		ASU ARIZONA STATE UNIVERSITY				Year 1	Year 2	Year 2	Year 3		
1	<b>PROPOSAL BUDGET</b>	<b>Start Date:</b> 2/1/2014	Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.										
2	Year 1 Total =	\$17,482	<b>End Date:</b> 1/31/2016										
3	Summary Budget =	\$35,671	<a href="#">Click to Update ERE/Tuition Rates</a>										
4	Total Years =	2.00	<b>PI Name:</b> Paul Irving		<b>Sponsor:</b> NSF			Info		Info			
5	<b>1. DIRECT COSTS</b>	<b>PI e-mail:</b> paul.irving@asu.edu		<b>PI Phone:</b> XXX-XXXX		1.03	Salary Escalation	1.03	Salary Escalation				
6	<b>1.A. SALARIES, WAGES, BENEFITS &amp; INS</b>												
7			/mos	# mos	% effort								
8	<b>Faculty Salaries</b>						# mos	% effort		# mos	% effort		
9	PI: Paul Irving	AY Salary:	\$85,000	\$9,728	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	
10	AY LOE Yr 1 =	0.00 person months											
11	Sum LOE Yr 1 =	0.90 person months		\$9,728	1.00	90.000%	\$8,755	1.00	90.000%	\$9,018	0.00	0.000%	
12	Total LOE Yr 1 =	0.90											
13	Count =	1					SUB-TOTAL Salary=	\$8,755	AY LOE =	0.00	\$9,018	AY LOE =	0.00
14							ERE	\$2,597	Sum LOE =	0.90	\$2,755	Sum LOE =	0.00
15							<b>Total Salary &amp; ERE</b>	<b>\$11,352</b>	<b>LOE =</b>	<b>0.90</b>	<b>\$11,773</b>	<b>LOE =</b>	<b>0.00</b>

### Co-PI

- There are four Co-PI lines provided. Follow the PI instructions above for entering salary information.

J11		=G11		ASU ARIZONA STATE UNIVERSITY				Year 1	Year 2	Year 2	Year 3		
1	<b>PROPOSAL BUDGET</b>	<b>Start Date:</b> 2/1/2014	Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.										
2	Year 1 Total =	\$28,907	<b>End Date:</b> 1/31/2016										
3	Summary Budget =	\$58,985	<a href="#">Click to Update ERE/Tuition Rates</a>										
4	Total Years =	2.00	<b>PI Name:</b> Paul Irving		<b>Sponsor:</b> NSF			Info		Info			
5	<b>1. DIRECT COSTS</b>	<b>PI e-mail:</b> paul.irving@asu.edu		<b>PI Phone:</b> XXX-XXXX		1.03	Salary Escalation	1.03	Salary Escalation				
6	<b>1.A. SALARIES, WAGES, BENEFITS &amp; INS</b>												
7			/mos	# mos	% effort								
8	<b>Faculty Salaries</b>						# mos	% effort		# mos	% effort		
9	PI: Paul Irving	AY Salary:	\$85,000	\$9,728	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	
10	AY LOE Yr 1 =	0.00 person months											
11	Sum LOE Yr 1 =	0.90 person months		\$9,728	1.00	90.000%	\$8,755	1.00	90.000%	\$9,018	0.00	0.000%	
12	Total LOE Yr 1 =	0.90											
13	Count =	1					SUB-TOTAL Salary=	\$8,755	AY LOE =	0.00	\$9,018	AY LOE =	0.00
14							ERE	\$2,597	Sum LOE =	0.90	\$2,755	Sum LOE =	0.00
15							<b>Total Salary &amp; ERE</b>	<b>\$11,352</b>	<b>LOE =</b>	<b>0.90</b>	<b>\$11,773</b>	<b>LOE =</b>	<b>0.00</b>
16	<b>Co-PI: Connie Owens</b>	AY Salary:	\$100,000	\$11,444	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	
17	AY LOE Yr 1 =	0.00 person months											
18	Sum LOE Yr 1 =	0.50 person months		\$11,444	0.50	100.000%	\$5,722	0.50	100.000%	\$5,894	0.00	0.000%	
19	Total LOE Yr 1 =	0.50											
20	Count =	1					SUB-TOTAL Salary=	\$5,722	AY LOE =	0.00	\$5,894	AY LOE =	0.00
21							ERE	\$1,697	Sum LOE =	0.50	\$1,801	Sum LOE =	0.00
22							<b>Total Salary &amp; ERE</b>	<b>\$7,419</b>	<b>LOE =</b>	<b>0.50</b>	<b>\$7,695</b>	<b>LOE =</b>	<b>0.00</b>

# Staff Salaries

## Post Doctoral Associate

- Enter the Fiscal Year (FY) Salary. The Budget Worksheet will calculate the monthly rate.
- Enter the # of months horizontally.
- Enter the % effort.
- In Column B, enter the # of staff (note that one could have multiple Post Docs at the same rate).
- The Budget Worksheet will then calculate the total Year 1 salary as well as the related ERE. It will populate the out years as well. (Again, in this example, year 3 has been zeroed out.)

A46		Post Doctoral Associate												
	A	B	C	D	E	F	G	H	I	J	K	L	M	
1	<b>PROPOSAL BUDGET</b>		<b>Start Date:</b> 2/1/2014					<b>ASU ARIZONA STATE UNIVERSITY</b>						
2	Year 1 Total =	\$118,886	<b>End Date:</b> 1/31/2016											
3	Summary Budget =	\$242,522	<b>Click to Update ERE/Tuition Rates</b>					<b>Year 1</b>	<b>Year 2</b>	<b>Year 2</b>		<b>Year 3</b>		
43								Total Salary & ERE	\$0	LOE = 0.00	\$0	LOE = 0.00		
44	<b>Sub-Total Faculty Salaries</b>		<b>2 = # of senior personnel</b>					\$14,477			\$14,912			
45	<b>Staff Salaries</b>													
46	Post Doctoral Associate		FY Salary:	\$45,000	\$3,863	12.00	100.000%	\$46,350	# mos = 12.00	\$47,741	# mos = 0.00			
47	LOE Yr 1 =	12.00	person months											
48	# of staff =	1.0						SUB-TOTAL Salary=	\$46,350	% effort = 100.000%	\$47,741	% effort = 0.000%		
49								ERE	\$12,078		\$12,814			
50										LOE = 12.00		LOE = 0.00		
51								Total Salary & ERE	\$58,428	# of staff = 1.0	\$60,555	# of staff = 0.0		
52	Staff		FY Salary:	\$0	\$0	0.00	0.000%	\$0	# mos = 0.00	\$0	# mos = 0.00			
53	LOE Yr 1 =	0.00	person months											
54	# of staff =	0.0						SUB-TOTAL Salary=	\$0	% effort = 0.000%	\$0	% effort = 0.000%		
55								ERE	\$0		\$0			
56										LOE = 0.00		LOE = 0.00		
57								Total Salary & ERE	\$0	# of staff = 0.0	\$0	# of staff = 0.0		
58	Staff		FY Salary:	\$0	\$0	0.00	0.000%	\$0	# mos = 0.00	\$0	# mos = 0.00			
59	LOE Yr 1 =	0.00	person months											
60	# of staff =	0.0						SUB-TOTAL Salary=	\$0	% effort = 0.000%	\$0	% effort = 0.000%		
61								ERE	\$0		\$0			
62										LOE = 0.00		LOE = 0.00		
63								Total Salary & ERE	\$0	# of staff = 0.0	\$0	# of staff = 0.0		
64	Administrative Staff		FY Salary:	\$0	\$0	0.00	0.000%	\$0	# mos = 0.00	\$0	# mos = 0.00			
65	LOE Yr 1 =	0.00	person months											
66	# of staff =	0.0						SUB-TOTAL Salary=	\$0	% effort = 0.000%	\$0	% effort = 0.000%		
67								ERE	\$0		\$0			
68										LOE = 0.00		LOE = 0.00		
69								Total Salary & ERE	\$0	# of staff = 0.0	\$0	# of staff = 0.0		
70	<b>Sub-Total Staff Salaries</b>							\$46,350			\$47,741			

### Staff and Administrative Staff

- Follow the same steps as the Post Doctoral Associate. The Budget Worksheet will calculate ERE using the staff ERE rate.
- Be cautious to follow CAS Exception/2 CFR 200 (Uniform Guidance) regarding administrative staff before including them in the budget. See the [CAS sitelet](#) for guidance.

A52		Staff - Data Manager												
A	B	C	D	E	F	G	H	I	J	K	L	M		
1	<b>PROPOSAL BUDGET</b>	Start Date: 2/1/2014		Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.										
2	Year 1 Total =	\$123,465	End Date: 1/31/2016					Year 1		Year 2		Year 3		
3	Summary Budget =	\$251,870	Click to Update ERE/Tuition Rates					Total Salary & ERE		LOE = 0.00		\$0		
43								Year 1		Year 2		Year 3		
44	<b>Sub-Total Faculty Salaries</b>				2 = # of senior personnel			\$14,477		\$14,912		\$0		
45	<b>Staff Salaries</b>													
46	Post Doctoral Associate	FY Salary:	\$45,000	\$3,863	12.00	100.000%	\$46,350	# mos =	12.00	\$47,741	# mos =	0.00		
47	LOE Yr 1 =	12.00 person months												
48	# of staff =	1.0												
49					SUB-TOTAL Salary=			\$46,350	% effort =		100.000%	\$47,741	% effort =	
50					ERE			\$12,078	LOE =		12.00	\$12,814	LOE =	
51					Total Salary & ERE			\$58,428	# of staff =		1.0	\$60,555	# of staff =	
52	Staff - Data Manager	FY Salary:	\$50,000	\$4,292	1.00	50.000%	\$2,146	# mos =	1.00	\$2,210	# mos =	0.00		
53	LOE Yr 1 =	0.50 person months												
54	# of staff =	1.0												
55					SUB-TOTAL Salary=			\$2,146	% effort =		50.000%	\$2,210	% effort =	
56					ERE			\$827	LOE =		0.50	\$877	LOE =	
57					Total Salary & ERE			\$2,973	# of staff =		1.0	\$3,087	# of staff =	
58	Staff	FY Salary:	\$0	\$0	0.00	0.000%	\$0	# mos =	0.00	\$0	# mos =	0.00		
59	LOE Yr 1 =	0.00 person months												
60	# of staff =	0.0												
61					SUB-TOTAL Salary=			\$0	% effort =		0.000%	\$0	% effort =	
62					ERE			\$0	LOE =		0.00	\$0	LOE =	
63					Total Salary & ERE			\$0	# of staff =		0.0	\$0	# of staff =	
64	Administrative Staff	FY Salary:	\$0	\$0	0.00	0.000%	\$0	# mos =	0.00	\$0	# mos =	0.00		
65	LOE Yr 1 =	0.00 person months												
66	# of staff =	0.0												
67					SUB-TOTAL Salary=			\$0	% effort =		0.000%	\$0	% effort =	
68					ERE			\$0	LOE =		0.00	\$0	LOE =	
69					Total Salary & ERE			\$0	# of staff =		0.0	\$0	# of staff =	
70	<b>Sub-Total Staff Salaries</b>							\$48,496		\$49,951		\$0		

## Graduate Research Assistants: Graduate Students-MS & Graduate Students-PhD

- Enter the Academic (AY) salary. The Budget Worksheet then calculates a monthly rate.
- Enter the number of Academic (or Summer) months and percent of effort.
- In Column B, enter the number of AY students and the number of Summer students working (at the same rate).
- Now the Budget Worksheet will autocalculate Total Salary and corresponding ERE, calculated with the graduate assistant rate.

A72		Grad Students - MS												
A	B	C	D	E	F	G	H	I	J	K	L	M		
1	<b>PROPOSAL BUDGET</b>	Start Date:	2/1/2014	Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.										
2	Year 1 Total =	\$178,112	End Date:	1/31/2016										
3	Summary Budget =	\$363,814	Click to Update ERE/Tuition Rates			Year 1	Year 2	Year 2	Year 3					
70	<b>Sub-Total Staff Salaries</b>						\$48,496		\$49,951					
71	<b>Graduate Research Assistants</b>													
72	Grad Students - MS	AY Salary:	\$17,500	\$1,944	9.00	100.00%	\$17,500	# mos	% effort	\$18,025	# mos	% effort		
73	AY LOE Yr 1 =	9.00 person months						9.00	100.00%		0.00	0.00%		
74	Sum LOE Yr 1 =	1.50 person months	\$3,889	3.00	50.00%	\$5,833	# of stdts =	1		\$6,008	# of stdts =	0		
75	Total LOE Yr 1 =	10.50					# of stdts =	1			# of stdts =	0		
76	# of AY stdts =	1.0	SUB-TOTAL Salary=			\$23,333	AY LOE =	9.00		\$24,033	AY LOE =	0.00		
77	# of sum stdts =	1.0	ERE			\$1,851	Sum LOE =	1.50		\$1,963	Sum LOE =	0.00		
78			LOE =			10.50	LOE =	10.50			LOE =	0.00		
79			<b>Total Salary &amp; ERE</b>			\$25,184				\$25,996				
80	Grad Students - PhD	AY Salary:	\$0	\$0	0.00	0.00%	\$0	0.00	0.00%	\$0	0.00	0.00%		
81	AY LOE Yr 1 =	0.00 person months					# of stdts =	0		\$0	# of stdts =	0		
82	Sum LOE Yr 1 =	0.00 person months	\$0	0.00	0.00%	\$0	# of stdts =	0		\$0	# of stdts =	0		
83	Total LOE Yr 1 =	0.00					AY LOE =	0.00		\$0	AY LOE =	0.00		
84	# of AY stdts =	0.0	SUB-TOTAL Salary=			\$0	Sum LOE =	0.00		\$0	Sum LOE =	0.00		
85	# of sum stdts =	0.0	ERE			\$0	LOE =	0.00		\$0	LOE =	0.00		
86			<b>Total Salary &amp; ERE</b>			\$0				\$0				
87														
88	<b>Sub-Total GRA Salaries</b>						\$23,333		\$24,033					
89	<b>Hourly Students</b>													
90	Hourly Students	AY Salary:	\$0	\$0	0.00	0.00%	\$0	# mos	% effort	\$0	# mos	% effort		
91	AY LOE Yr 1 =	0.00 person months					# of stdts =	0		\$0	# of stdts =	0		
92	Sum LOE Yr 1 =	0.00 person months	\$0	0.00	0.00%	\$0	# of stdts =	0		\$0	# of stdts =	0		
93	Total LOE Yr 1 =	0.00					AY LOE =	0.00		\$0	AY LOE =	0.00		
94	# of AY stdts =	0.0	SUB-TOTAL Salary=			\$0	Sum LOE =	0.00		\$0	Sum LOE =	0.00		
95	# of sum stdts =	0.0	ERE			\$0	LOE =	0.00		\$0	LOE =	0.00		
96			<b>Total Salary &amp; ERE</b>			\$0				\$0				
97														
98	Hourly Students	AY Salary:	\$0	\$0	0.00	0.00%	\$0	0.00	0.00%	\$0	0.00	0.00%		
99	AY LOE Yr 1 =	0.00 person months					# of stdts =	0		\$0	# of stdts =	0		
100	Sum LOE Yr 1 =	0.00 person months	\$0	0.00	0.00%	\$0	# of stdts =	0		\$0	# of stdts =	0		
101	Total LOE Yr 1 =	0.00					AY LOE =	0.00		\$0	AY LOE =	0.00		
102	# of AY stdts =	0.0	SUB-TOTAL Salary=			\$0	Sum LOE =	0.00		\$0	Sum LOE =	0.00		
103	# of sum stdts =	0.0	ERE			\$0	LOE =	0.00		\$0	LOE =	0.00		

## Hourly Students

Hourly student workers can be either undergraduate or graduate students. As student workers, they do not receive tuition remission or healthcare benefits. Please follow your unit's policy for budgeting graduate students as hourly workers.

- Enter the Academic (AY) salary. For hourly student workers this will be their hourly rate x 1560 hours, per the cell note—you will need to calculate that total separately. The Budget Worksheet then calculates a monthly rate.
- Enter the number of Academic (or Summer) months and percent of effort.
- In Column B, enter the number of AY students and the number of Summer students working (at the same rate).
- Now the Budget Worksheet will autocalculate Total Salary and corresponding ERE, calculated with the hourly student rate.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>PROPOSAL BUDGET</b>		<b>Start Date:</b> 2/1/2014					<b>ASU ARIZONA STATE UNIVERSITY</b>					
2	Year 1 Total =	\$178,112	<b>End Date:</b> 1/31/2016										
3	Summary Budget =	\$363,814	<b>Click to Update ERE/Tuition Rates</b>					<b>Year 1</b>	<b>Year 2</b>	<b>Year 2</b>	<b>Year 3</b>		
88	<b>Sub-Total GRA Salaries</b>							<b>\$23,333</b>			<b>\$24,033</b>		
89	<b>Hourly Students</b>												
90	Hourly Students		AY Salary:	\$0	Hourly Rate X 1560 Hours	0.00	0.000%	\$0	# mos	% effort	\$0	# mos	% effort
91	AY LOE Yr 1 =	0.00	person months						0.00	0.000%	\$0	0.00	0.000%
92	Sum LOE Yr 1 =	0.00	person months						# of stdts =	0	\$0	# of stdts =	0
93	Total LOE Yr 1 =	0.00							# of stdts =	0	\$0	# of stdts =	0
94	# of AY stdts =	0.0						<b>SUB-TOTAL Salary=</b>	AY LOE =	0.00	\$0	AY LOE =	0.00
95	# of sum stdts =	0.0						<b>ERE</b>	Sum LOE =	0.00	\$0	Sum LOE =	0.00
96									LOE =	0.00	\$0	LOE =	0.00
97								<b>Total Salary &amp; ERE</b>			<b>\$0</b>		
98	Hourly Students		AY Salary:	\$0	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%
99	AY LOE Yr 1 =	0.00	person months						# of stdts =	0	\$0	# of stdts =	0
100	Sum LOE Yr 1 =	0.00	person months		\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%
101	Total LOE Yr 1 =	0.00							# of stdts =	0	\$0	# of stdts =	0
102	# of AY stdts =	0.0						<b>SUB-TOTAL Salary=</b>	AY LOE =	0.00	\$0	AY LOE =	0.00
103	# of sum stdts =	0.0						<b>ERE</b>	Sum LOE =	0.00	\$0	Sum LOE =	0.00
104									LOE =	0.00	\$0	LOE =	0.00
105								<b>Total Salary &amp; ERE</b>			<b>\$0</b>		
106	<b>Sub-Total Hourly Salaries</b>							<b>\$0</b>			<b>\$0</b>		
107	<b>TOTAL SALARIES &amp; WAGES</b>							<b>\$86,306</b>			<b>\$88,896</b>		
108	Faculty Benefits		29.66%	30.55%	31.47%			\$4,294			\$4,556		
109	Staff Benefits - 50% or more		38.52%	39.68%	40.87%			\$827			\$877		
110	Post Doctoral Associate		26.06%	26.84%	27.65%			\$12,078			\$12,814		
111	Graduate Student Benefits		7.93%	8.17%	8.41%			\$1,851			\$1,963		
112	Undergraduate Student Benefits		2.88%	2.97%	3.06%			\$0			\$0		
113	<b>Sub-Total Benefits * See notes at the bottom on ERE rates</b>							<b>\$19,050</b>			<b>\$20,210</b>		
114	<b>TOTAL SALARIES &amp; BENEFITS</b>							<b>\$105,356</b>			<b>\$109,106</b>		

A total is given for Salaries & Wages, adding the subtotals from the various Personnel categories, followed by the Benefits subtotal. The Total Salaries & Benefits are then calculated.

## 1.B. Travel

Travel is divided into three types: In State, Out of State, and Foreign. Be mindful of the sponsor's rules regarding foreign travel and also which countries they consider to be foreign travel. Do not include consultant travel in this section – there is a specific line in Other Direct Costs below for those expenses.

It can be useful to use a separate Excel worksheet to outline all travel costs under each of the three categories (you can add a new tab within the same workbook). You may have several Out of State trips, for example, to different locations. In such instances, the separate worksheet will allow you to calculate your total costs for that category; you may then skip completing the various cells described below and simply enter total amounts for the specific line items in Column H.

- Use the per diem rate charts found on Financial Services' [website](#) for meals and lodging rates by location.
- Enter the number of days and the total meals rate per day. This will total across.
- Enter the number of nights and the lodging rate per night. This will total across.
- Use a service such as Expedia or Kayak to calculate average plane fare and enter.
- Use a provider website to calculate average rental car cost, if anticipated, and enter.
- If travel is to a conference, enter the anticipated registration amount (use previous year's rates as reference, if current rate is not available), and enter.
- Add any additional anticipated costs (local transportation such as taxi, subway, etc.) and enter under Other (this amount will be added to the Transportation line immediately above).
- Note that the Budget Worksheet brings these same costs over into the out years. If the same travel is not anticipated, remember to zero these out or adjust accordingly.

A121		Travel - Out State											
A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	<b>PROPOSAL BUDGET</b>	<b>Start Date:</b>	2/1/2014	Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.									
2	Year 1 Total =	\$179,703	<b>End Date:</b>	1/31/2016									
3	Summary Budget =	\$367,001	Click to Update ERE/Tuition Rates										
115	<b>1.B. TRAVEL</b>							<b>Year 1</b>	<b>Year 2</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 3</b>	
116	Travel - In State	Per diem	# days> 0	/day>	\$0.00		\$0		\$0		\$0		
117		Lodging	# nights> 0	/night>	\$0.00		\$0		\$0		\$0		
118		Transportation	plane fare>	\$0.00	rental car>	\$0.00	\$0		\$0		\$0		
119		Registration	\$0.00	other>	\$0.00		\$0		\$0		\$0		
120		TOTAL In-State					\$0		\$0		\$0		
121	Travel - Out State	Per diem	# days> 2	/day>	\$59.00		\$118		\$118		\$0		
122		Lodging	# nights> 2	/night>	\$195.00		\$390		\$390		\$0		
123		Transportation	plane fare>	\$450.00	rental car>	\$0.00	\$525		\$525		\$0		
124		Registration	\$0.00	other>	\$75.00		\$0		\$0		\$0		
125		TOTAL Out-State					\$1,033		\$1,033		\$0		
126	Travel - Foreign	Per diem	# days> 0	/day>	\$0.00		\$0		\$0		\$0		
127		Lodging	# nights> 0	/night>	\$0.00		\$0		\$0		\$0		
128		Transportation	plane fare>	\$0.00	rental car>	\$0.00	\$0		\$0		\$0		
129		Registration	\$0.00	other>	\$0.00		\$0		\$0		\$0		
130		TOTAL Foreign					\$0		\$0		\$0		
131	<b>TOTAL TRAVEL</b>							<b>\$1,033</b>		<b>\$1,033</b>		<b>\$0</b>	

## 1.C. Other Direct Costs

Enter the specifics for each line item. Except for consultants, you will be entering a total figure so again, a separate worksheet can be useful for adding up total costs for each line item. Be mindful whether the sponsor will allow certain line items, such as publication charges, and 2 CFR 200 (Uniform Guidance) rules regarding direct vs. indirect charges. Consult the CAS [sitelet](#) if you are unsure of any proposed items.

**NOTE:** The Budget Worksheet fills these line items across all years; if an expense is nonrecurring be sure to remove it from out years.

- 7310-01: Consultants – enter the daily rate and the number of days  
Consultant travel – calculate separately and enter total
- 7310-22: Publication/Page Charges – enter total
- 7310-28: Photocopy Charges – enter total
- 7310-80: Computer Use Fees – enter total
- 7320-01: Office Supplies – enter total
- 7320-05: Materials & Lab Supplies – enter total
- 7320-48: Computer Software – enter total
- 7325-22: Lab Equipment under \$5,000 – enter total
- 7330-01: Postage/Express Mail/Airborne – enter total
- 7330-06: Telephone/FAX – enter total
- 7390-16: Computer Connect Charges – enter total
- Rental/Equipment Use Fees – enter total
- Other – enter type of item on the line adjacent to “Other” and enter total

A140		7320-48													
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	<b>PROPOSAL BUDGET</b>		<b>Start Date:</b> 2/1/2014			Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.		<b>ASU ARIZONA STATE UNIVERSITY</b>							
2	Year 1 Total =	\$181,551	<b>End Date:</b> 1/31/2016												
3	Summary Budget =	\$368,849	<a href="#">Click to Update ERE/Tuition Rates</a>					<b>Year 1</b>	Year 2	<b>Year 2</b>	Year 3	<b>Year 3</b>			
130		TOTAL Foreign						\$0		\$0			\$0		
131	<b>TOTAL TRAVEL</b>							<b>\$1,033</b>		<b>\$1,033</b>			<b>\$0</b>		
132	<b>1.C. OTHER DIRECT COSTS</b>			Daily Rate	# days										
133	7310-01	Consultants		\$0	0			\$0		\$0			\$0		
134		Consultant travel						\$0		\$0			\$0		
135	7310-22	Publication/Page Charges						\$0		\$0			\$0		
136	7310-28	Photocopy Charges						\$0		\$0			\$0		
137	7310-80	Computer Use Fees						\$0		\$0			\$0		
138	7320-01	Office Supplies						\$0		\$0			\$0		
139	7320-05	Materials & Lab Supplies						\$0		\$0			\$0		
140	7320-48	Computer Software						\$1,200		\$0			\$0		
141	7325-22	Lab Equipment under 5,000						\$0		\$0			\$0		
142	7330-01	Postage/Express Mail/Airborne						\$0		\$0			\$0		
143	7330-06	Telephone/FAX						\$0		\$0			\$0		
144	7390-16	Computer Connect Charges						\$0		\$0			\$0		
145		Rental/Equipment Use Fees						\$0		\$0			\$0		
146		Other						\$0		\$0			\$0		
147	<b>TOTAL OTHER DIRECT COSTS</b>							<b>\$1,200</b>		<b>\$0</b>			<b>\$0</b>		

### 1.D. Modified Total Direct Costs

Modified Total Direct Costs are calculated. This is the amount to which the F&A rate will be applied in standard fashion.

Line items with restrictions regarding F&A are found below the Modified Total Direct Costs line.

In this section, note that tuition remission is autocalculated based on the information from the Graduate Research Assistants section.

A150		Tuition Remission												
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	<b>PROPOSAL BUDGET</b>		<b>Start Date:</b> 2/1/2014			Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.								
2	Year 1 Total =	\$181,551	<b>End Date:</b> 1/31/2016					<b>Year 1</b>	<b>Year 2</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 3</b>		
3	Summary Budget =	\$368,849	<a href="#">Click to Update ERE/Tuition Rates</a>											
139	7320-05	Materials & Lab Supplies						\$0		\$0			\$0	
140	7320-48	Computer Software						\$1,200		\$0			\$0	
141	7325-22	Lab Equipment under 5,000						\$0		\$0			\$0	
142	7330-01	Postage/Express Mail/Airborne						\$0		\$0			\$0	
143	7330-06	Telephone/FAX						\$0		\$0			\$0	
144	7390-16	Computer Connect Charges						\$0		\$0			\$0	
145		Rental/Equipment Use Fees						\$0		\$0			\$0	
146		Other						\$0		\$0			\$0	
147	<b>TOTAL OTHER DIRECT COSTS</b>							<b>\$1,200</b>		<b>\$0</b>			<b>\$0</b>	
148	<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>							<b>\$107,589</b>		<b>\$110,139</b>			<b>\$0</b>	
149	<b>CAPITAL EQUIPMENT</b>							\$0		\$0			\$0	
150	Tuition Remission	7200-48						\$15,864		\$17,133			\$0	
151	Sub-Recipient(s)		Insert Name>					\$0		\$0			\$0	
152			Insert Name>					\$0		\$0			\$0	
153			Insert Name>					\$0		\$0			\$0	
154			Insert Name>					\$0		\$0			\$0	
155	<b>TOTAL Sub-Recipients</b>							\$0		\$0			\$0	
156	Participant Support	Stipends	Indicate total number of participants here>					\$0		\$0			\$0	
157	Costs	Travel						\$0		\$0			\$0	
158		Subsistence						\$0		\$0			\$0	
159		Other						\$0		\$0			\$0	
160	<b>TOTAL</b>							\$0		\$0			\$0	
161	Scholarships		Insert # students >	0	Insert >	\$0		\$0		\$0			\$0	
162	<b>1.E. TOTAL DIRECT COSTS</b>							<b>\$123,453</b>		<b>\$127,272</b>			<b>\$0</b>	
163	<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>							\$58,098		\$60,026			\$0	
164	Select F&A Rate	On Campus Research												
165	* See notes at the bottom on F&A rates for Subs = see note													
166			54.0% MTDC Year 1					\$0						
167			54.5% MTDC Year 2										\$0	
168			54.5% MTDC Year 3											\$0
169	<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>							<b>\$58,098</b>		<b>\$60,026</b>			<b>\$0</b>	
170	<b>3. TOTAL PROJECT COSTS</b>							<b>\$181,551</b>		<b>\$187,298</b>			<b>\$0</b>	
171	<b>TUITION REMISSION RATES</b>													
172			FY2015	FY2016	FY2017									

For subawards/subcontracts, list each name where indicated in column E (so they autofill on the Budget Summary), and the total amount for each in the Subrecipient section. For each subrecipient listed, in the F&A section that follows Total Direct Costs, F&A will be calculated on the first \$25,000 of each total subcontract, using the approved rate listed. For any one subrecipient, any amount over \$25,000 will be excluded from the F&A calculation.

**NOTE:** For Sub-Recipients, the amounts from Year 1 do not autopopulate to the out years.

Copy of Three Year Budget Template - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Developer Add-Ins

Clipboard Font Alignment Number Styles

B166 see note

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	<b>PROPOSAL BUDGET</b>		<b>Start Date:</b>	2/1/2014		Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.								
2	Year 1 Total =	\$248,151	<b>End Date:</b>	1/31/2016										
3	Summary Budget =	\$435,449	Click to Update ERE/Tuition Rates					<b>Year 1</b>	Year 2	<b>Year 2</b>	Year 3	<b>Year 3</b>		
145		Rental/Equipment Use Fees						\$0			\$0		\$0	
146		Other						\$0			\$0		\$0	
147	<b>TOTAL OTHER DIRECT COSTS</b>							<b>\$1,200</b>			<b>\$0</b>		<b>\$0</b>	
148	<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>							<b>\$107,589</b>			<b>\$110,139</b>		<b>\$0</b>	
149	<b>CAPITAL EQUIPMENT</b>							\$0			\$0		\$0	
150	Tuition Remission	7200-48						\$15,864			\$17,133		\$0	
151	Sub-Recipient(s)				Insert Name> UA			\$30,000			\$0		\$0	
152					Insert Name> NAU			\$15,000			\$0		\$0	
153					Insert Name>			\$0			\$0		\$0	
154					Insert Name>			\$0			\$0		\$0	
155	<b>TOTAL Sub-Recipients</b>							\$45,000			\$0		\$0	
156	Participant Support	Stipends	Indicate total number of participants here>					\$0			\$0		\$0	
157	Costs	Travel						\$0			\$0		\$0	
158		Subsistence						\$0			\$0		\$0	
159		Other						\$0			\$0		\$0	
160	<b>TOTAL</b>							\$0			\$0		\$0	
161	Scholarships		Insert # students >	0	Insert >	\$0		\$0			\$0		\$0	
162	<b>1.E. TOTAL DIRECT COSTS</b>							<b>\$168,453</b>			<b>\$127,272</b>		<b>\$0</b>	
163	<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>					54.0% MTDC Year 1		\$58,098			\$60,026		\$0	
164	<b>Select F&amp;A Rate</b>	On Campus Research				54.5% MTDC Year 2								
165	* See notes at the bottom on F&A rates					54.5% MTDC Year 3								
166	for Subs =	see note			Need to enter calculation for 1st \$25k in appropriate cell.	54.0% of first 25,000 Year 1		\$21,600						
167						54.5% of first 25,000 Year 2					\$0			
168						54.5% of first 25,000 Year 3							\$0	
169	<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>							<b>\$79,698</b>			<b>\$60,026</b>		<b>\$0</b>	
170	<b>3. TOTAL PROJECT COSTS</b>							<b>\$248,151</b>			<b>\$187,298</b>		<b>\$0</b>	

## 1.E. Total Direct Costs

The Total Direct Cost amount is calculated using Modified Total Direct Costs and these Other Costs.

## 2. Total Facilities & Administrative Costs (F&A)

The F&A total is calculated using the default rate, which is the approved rate for on-campus research. If a different approved F&A rate is to be used, modify it in the Facilities & Administrative Costs section below Total Direct Costs (See F&A Modifications below).

A162		1.E. TOTAL DIRECT COSTS													
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	<b>PROPOSAL BUDGET</b>		<b>Start Date:</b> 2/1/2014			 Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.									
2	Year 1 Total =	\$248,151	<b>End Date:</b> 1/31/2016												
3	Summary Budget =	\$435,449	<a href="#">Click to Update ERE/Tuition Rates</a>												
148	<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>							<b>Year 1</b>	<b>Year 2</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 3</b>			
								<b>\$107,589</b>		<b>\$110,139</b>			<b>\$0</b>		
149	CAPITAL EQUIPMENT							\$0		\$0			\$0		
150	Tuition Remission 7200-48							\$15,864		\$17,133			\$0		
151	Sub-Recipient(s)							\$30,000		\$0			\$0		
152	Insert Name> UA							\$15,000		\$0			\$0		
153	Insert Name> NAU							\$0		\$0			\$0		
154	Insert Name>							\$0		\$0			\$0		
155	Insert Name>							\$0		\$0			\$0		
155	<b>TOTAL Sub-Recipients</b>							<b>\$45,000</b>		<b>\$0</b>			<b>\$0</b>		
156	Participant Support Stipends <i>ndicate total number of participants here&gt;</i>							\$0		\$0			\$0		
157	Costs Travel							\$0		\$0			\$0		
158	Subsistence							\$0		\$0			\$0		
159	Other							\$0		\$0			\$0		
160	<b>TOTAL</b>							<b>\$0</b>		<b>\$0</b>			<b>\$0</b>		
161	Scholarships <i>Insert # students &gt;</i> 0 <i>Insert &gt;</i> \$0							\$0		\$0			\$0		
162	<b>1.E. TOTAL DIRECT COSTS</b>							<b>\$168,453</b>		<b>\$127,272</b>			<b>\$0</b>		
163	<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>							\$58,098		\$60,026			\$0		
164	<b>Select F&amp;A Rate</b> On Campus Research														
165	* See notes at the bottom on F&A rates														
166	for Subs = see note							\$21,600		\$0			\$0		
167	54.0% MTDC Year 1														
168	54.5% MTDC Year 2														
168	54.5% MTDC Year 3														
168	54.0% of first 25,000 Year 1														
168	54.5% of first 25,000 Year 2														
168	54.5% of first 25,000 Year 3														
169	<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>							<b>\$79,698</b>		<b>\$60,026</b>			<b>\$0</b>		
170	<b>3. TOTAL PROJECT COSTS</b>							<b>\$248,151</b>		<b>\$187,298</b>			<b>\$0</b>		

### 3. Total Project Costs

A complete Total Project Costs amount is then calculated.

**NOTE:** Cells B2 and B3 will autofill with the totals from Total Project Costs for Year 1 and the Summary Total Project Costs.

On the far right side there is a column that crosschecks totals across the years—use this to see whether you may have broken any formulas as you complete the form. Summary Total Project Costs (here, P170) should equal the cell to its right.

A170		3. TOTAL PROJECT COSTS																
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	<b>PROPOSAL BUDGET</b>		Start Date: 2/1/2014															
2	Year 1 Total =	\$248,151	End Date: 1/31/2016															
3	Summary Budget =	\$435,449	Click to Update ERE/Tuition Rates															
160	<b>TOTAL</b>				Year 1	Year 2	Year 2	Year 3	Year 3	Summary								
161	Scholarships		Insert # students >	0	Insert >	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
162	<b>1.E. TOTAL DIRECT COSTS</b>					<b>\$168,453</b>	<b>\$127,272</b>			<b>\$0</b>	<b>\$295,725</b>	\$295,725						
163	<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>				54.0% MTDC Year 1	\$58,098		\$60,026		\$0	\$118,124							
164	Select F&A Rate	On Campus Research	54.5% MTDC Year 2															
165	* See notes at the bottom on F&A rates				54.5% MTDC Year 3													
166	for Subs =	see note	54.0% of first 25,000 Year 1			\$21,600					\$21,600							
167					54.5% of first 25,000 Year 2			\$0			\$0							
168					54.5% of first 25,000 Year 3					\$0	\$0							
169	<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>					<b>\$79,698</b>	<b>\$60,026</b>			<b>\$0</b>	<b>\$139,724</b>	\$139,724						
170	<b>3. TOTAL PROJECT COSTS</b>					<b>\$248,151</b>	<b>\$187,298</b>			<b>\$0</b>	<b>\$435,449</b>	\$435,449						
171	<b>TUITION REMISSION RATES</b>																	
172			FY2015	FY2016	FY2017													
173	AY		\$14,895	\$16,087	\$17,374													
174	Summer		\$969	\$1,046	\$1,130													
175	Total		\$15,864	\$17,133	\$18,504													
176	ERE Rates: By clicking the button at cell C3-E3 the ERE rates update automatically based on the start date entered. The rates used for out years are escalated by 3%.																	
177	Tuition Rates: By clicking the button at cell C3-E3 the tuition rates update automatically based on the start date entered. The rates used for out years are escalated by 8%.																	
178	F&A Rates: If you need to change the rate to one of the approved negotiated rates, select the drop down in cell B164.																	
179																		

Budget totals are found in the Summary tab. Progress to creating the Funding Proposal and associated budget(s) in ERA.

The screenshot shows a Microsoft Excel spreadsheet titled "Copy of Three Year Budget Template - Microsoft Excel". The active sheet is "Budget Summary". The table below represents the data visible in the spreadsheet.

						Year 1	Year 2	Year 3	Summary
<b>Budget Summary</b>									
<b>Senior Personnel</b>									
6	PI: Paul Iving	Yr 1	0.90	P-Mos per year		\$8,755	\$9,018	\$0	\$17,773
7		Yr 2	0.90	P-Mos per year					
8		Yr 3	0.00	P-Mos per year					
9	Co-PI: Connie Owens	Yr 1	0.50	P-Mos per year		\$5,722	\$5,894	\$0	\$11,616
10		Yr 2	0.50	P-Mos per year					
11		Yr 3	0.00	P-Mos per year					
12	Co-PI:	Yr 1	0.00	P-Mos per year		\$0	\$0	\$0	\$0
13		Yr 2	0.00	P-Mos per year					
14		Yr 3	0.00	P-Mos per year					
15	Co-PI:	Yr 1	0.00	P-Mos per year		\$0	\$0	\$0	\$0
16		Yr 2	0.00	P-Mos per year					
17		Yr 3	0.00	P-Mos per year					
18	Co-PI:	Yr 1	0.00	P-Mos per year		\$0	\$0	\$0	\$0
19		Yr 2	0.00	P-Mos per year					
20		Yr 3	0.00	P-Mos per year					
22	Total Senior Personnel					\$14,477	\$14,912	\$0	\$29,389
<b>Other Personnel*</b>									
25	Post Doctoral Associate	Yr 1	1	@ 12.00 P-Mos per year		\$46,350	\$47,741	\$0	\$94,091
26		Yr 2	1	@ 12.00 P-Mos per year					
27		Yr 3	0	@ 0.00 P-Mos per year					
28	Staff - Data Manager	Yr 1	1	@ 0.50 P-Mos per year		\$2,146	\$2,210	\$0	\$4,356
29		Yr 2	1	@ 0.50 P-Mos per year					
30		Yr 3	0	@ 0.00 P-Mos per year					
31	Staff	Yr 1	0	@ 0.00 P-Mos per year		\$0	\$0	\$0	\$0
32		Yr 2	0	@ 0.00 P-Mos per year					
33		Yr 3	0	@ 0.00 P-Mos per year					
34	Administrative Staff	Yr 1	0	@ 0.00 P-Mos per year		\$0	\$0	\$0	\$0
35		Yr 2	0	@ 0.00 P-Mos per year					
36		Yr 3	0	@ 0.00 P-Mos per year					
37	Grad Students - PhD	Yr 1	0	@ 0.00 P-Mos per year		\$0	\$0	\$0	\$0
38		Yr 2	0	@ 0.00 P-Mos per year					
39		Yr 3	0	@ 0.00 P-Mos per year					
40	Grad Students - MS	Yr 1	1	@ 10.50 P-Mos per year		\$23,333	\$24,033	\$0	\$47,366
41		Yr 2	1	@ 10.50 P-Mos per year					
42		Yr 3	0	@ 0.00 P-Mos per year					
43	Hourly Students	Yr 1	0	@ 0.00 P-Mos per year		\$0	\$0	\$0	\$0
44		Yr 2	0	@ 0.00 P-Mos per year					

# MODIFYING F&A RATES IN THE BUDGET WORKSHEET

## 1. Modifying the F&A Rate to Reflect Project Type

Use the F&A [wizard](#) for guidance in determining the correct F&A rate for your proposal. When it is appropriate to modify the Budget Worksheet's F&A rate to other than the default on-campus research rate, select the rate using the dropdown menu in cell B164, which will update the rates for all years in Column E accordingly.

Example: The proposal F&A rate has been changed to the off-campus instruction rate of 26%. Subcontract lines have also been updated to show the corresponding rate.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	<b>PROPOSAL BUDGET</b>		<b>Start Date:</b>	2/1/2014		<div style="border: 1px solid red; padding: 2px;">                     Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.                 </div>										
2	Year 1 Total =	\$206,826	<b>End Date:</b>	1/31/2016												
3	Summary Budget =	\$362,734	<a href="#">Click to Update ERE/Tuition Rates</a>			<b>Year 1</b>	<b>Year 2</b>	<b>Year 2</b>	Year 3	<b>Year 3</b>	<b>Summary</b>					
160	<b>TOTAL</b>					\$0		\$0		\$0		\$0		\$0		\$0
161	Scholarships		Insert # students >	0	Insert >	\$0		\$0		\$0		\$0		\$0		\$0
162	<b>1.E. TOTAL DIRECT COSTS</b>					<b>\$168,453</b>		<b>\$127,272</b>				<b>\$0</b>		<b>\$295,725</b>		
163	<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>					26.0% MTDC Year 1	\$27,973		\$28,636			\$0		\$56,609		
164	<b>Select F&amp;A Rate</b>	Off Campus Instruction				26.0% MTDC Year 2										
165	* See notes at the	Off Campus Instruction				26.0% MTDC Year 3										
166	for Subs =	Off Campus Other Sponsored Activity				26.0% of first 25,000 Year 1	\$10,400							\$10,400		
167		Off Campus Research				26.0% of first 25,000 Year 2			\$0					\$0		
168		Off Campus Other Sponsored Activity				26.0% of first 25,000 Year 3							\$0	\$0		
168		Off Campus Research														
169	<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>					<b>\$38,373</b>		<b>\$28,636</b>		<b>\$0</b>		<b>\$67,009</b>				
170	<b>3. TOTAL PROJECT COSTS</b>					<b>\$206,826</b>		<b>\$155,908</b>		<b>\$0</b>		<b>\$362,734</b>				

## 2. When a Project Qualifies for the Off-Campus F&A Rate in Some Years but not Others

If a project qualifies for the off-campus F&A rate in some years but not in others, modify the appropriate F&A rate cells (found in Column E) to use the off-campus rate for the years the project qualifies and the on-campus rate for the other years. See the [F&A sitelet](#) for on- and off-campus rate guidance.

### 3. Modifying the F&A Rates to Reflect Start Date

F&A rates **do not** automatically update based on the Start Date like the ERE and Tuition Rates. They must be modified manually.

If you need to adjust the yearly F&A rates due to a project's anticipated start date, the following example illustrates those steps:

- Year 1's rate, 54.0%, is the FY14 rate (cell E163 here).
- The proposed project begins September 2014 (FY15), so Year 1's rate needs to be changed to reflect the FY15 (Year 2) rate which is found in the cell below, E164. We see that FY15's rate is 54.5%, so change cell E163 to reflect this.
- Essentially, each rate is moving up one line on the Budget Worksheet. As the following year's rate is also 54.5%, no further changes are necessary.

			ASU ARIZONA STATE UNIVERSITY									
			Year 1	Year 2	Year 2	Year 3	Year 3	Summary				
1	PROPOSAL BUDGET	Start Date:	Start dates that are 6 months or more into a fiscal year will calculate using the following year's rates.									
2	Year 1 Total =	End Date:										
3	Summary Budget =	\$0	Click to Update ERE/Tuition Rates									
163	FACILITIES & ADMINISTRATIVE COSTS (F&A)		54.0% MTDC Year 1								\$0	
164			54.5% MTDC Year 2								\$0	
165			54.5% MTDC Year 3								\$0	
166	for Subs =	see note	54.0% of first 25,000 Year 1								\$0	
167			54.5% of first 25,000 Year 2								\$0	
168			54.5% of first 25,000 Year 3								\$0	
169	2. TOTAL FACILITIES & ADMINISTRATIVE COSTS (F&A)										\$0	
170	3. TOTAL PROJECT COSTS										\$0	

- The result is as follows:

163	FACILITIES & ADMINISTRATIVE COSTS (F&A)		54.5% MTDC Year 1								\$0
164			54.5% MTDC Year 2								\$0
165			54.5% MTDC Year 3								\$0
166	for Subs =	see note	54.5% of first 25,000 Year 1								\$0
167			54.5% of first 25,000 Year 2								\$0
168			54.5% of first 25,000 Year 3								\$0
169	2. TOTAL FACILITIES & ADMINISTRATIVE COSTS (F&A)										\$0
170	3. TOTAL PROJECT COSTS										\$0

## ADDING ADDITIONAL FACULTY LINES TO THE BUDGET WORKSHEET

If there are more than four Co-PIs, use the purple “Add Faculty” button in the upper right corner. There is no limit to the number of additional Co-PIs that can be added. Any additional Co-PIs added to the Budget Worksheet will also be added to the Budget Summary page and to the two Cost Sharing pages.

**NOTE:** The “Add Faculty” function copies the first Co-PI line and adds the copy immediately below the first Co-PI. Identify in advance the total number of Co-PIs and add any additional Co-PI lines before you begin entering data in the first Co-PI line. Otherwise, that Co-PI’s information will be copied into the added Co-PI lines and will need to be cleared.

PROPOSAL BUDG		Sponsor:		Year 1		Year 2		Year 3		Summary	
Year 1 Total =		NSF		Year 1		Year 2		Year 3		Summary	
Summary Budget =		PI Phone:		Info		Info		Info		36 mos	
Total Years =		1.03		Salary Escalation		1.03		Salary Escalation		1.03	
1. DIRECT COSTS				1.03		Salary Escalation		1.03			
1.A. SALARIES, W											
Faculty Salaries				# mos		% effort		# mos		% effort	
PI: Paul Irving		\$9,728		0.00		0.000%		\$0		0.00 0.000%	
AY LOE Yr 1 =		\$9,728		1.00		90.000%		\$8,755		1.00 90.000%	
Sum LOE Yr 1 =		\$9,728		1.00		90.000%		\$8,755		1.00 90.000%	
Total LOE Yr 1 =		\$9,728		1.00		90.000%		\$8,755		1.00 90.000%	
Count =				SUB-TOTAL Salary=		\$8,755		AY LOE = 0.00		\$9,018	
				ERE		\$2,768		Sum LOE = 0.90		\$2,937	
				Total Salary & ERE		\$11,523		LOE = 0.90		\$11,955	
Co-PI: Connie Owen		\$11,444		0.00		0.000%		\$0		0.00 0.000%	
AY LOE Yr 1 =		\$11,444		0.50		100.000%		\$5,722		0.50 100.000%	
Sum LOE Yr 1 =		\$11,444		0.50		100.000%		\$5,722		0.50 100.000%	
Total LOE Yr 1 =		\$11,444		0.50		100.000%		\$5,722		0.50 100.000%	
Count =				SUB-TOTAL Salary=		\$5,722		AY LOE = 0.00		\$5,894	
				ERE		\$1,809		Sum LOE = 0.50		\$1,920	
				Total Salary & ERE		\$7,531		LOE = 0.50		\$7,814	
Co-PI:		\$0		0.00		0.000%		\$0		0.00 0.000%	
AY LOE Yr 1 =		\$0		0.00		0.000%		\$0		0.00 0.000%	
Sum LOE Yr 1 =		\$0		0.00		0.000%		\$0		0.00 0.000%	
Total LOE Yr 1 =		\$0		0.00		0.000%		\$0		0.00 0.000%	
Count =				SUB-TOTAL Salary=		\$0		AY LOE = 0.00		\$0	
				ERE		\$0		Sum LOE = 0.00		\$0	
				Total Salary & ERE		\$0		LOE = 0.00		\$0	

## ADDING ADDITIONAL STAFF LINES TO THE BUDGET WORKSHEET

Additional staff lines can be added to the Budget Worksheet. Another option is to list multiple positions on one line when the salary amount is the same, such as three programmers at \$45,000 each.

**NOTE:** The Post-Doctoral Associate line draws its ERE calculation from a different cell than the other three salary lines, so decide which type of staff position you need to add before copying. Additions must be inserted above the fourth line (Administrative Staff) to be included in the equation range for Staff Salaries totals.

**Scenario:** There will be two Post Doctoral Associates on the project at different salaries, and the Budget Worksheet has space for one.

**Step 1:** Copy the Post Doctoral Associate's six-line block.

PROPOSAL BUDGET		Start Date:	2/1/2014	Sponsor:	ARIZONA STATE UNIVERSITY							
Year 1 Total =	\$261,199	End Date:	1/31/2016	NSF	Year 1	Year 2	Year 2	Year 3	Year 3	Su		
Summary Budget =	\$497,203	CLICK THIS AFTER Updating Start Date			\$14,477		\$14,912		\$0			
<b>Sub-Total Faculty Salaries</b>					<b>2 = # of senior personnel</b>							
<b>Staff Salaries</b>												
Post Doctoral Associate	FY Salary:	\$45,000	\$3,863	12.00	100.000%	\$46,350	# mos =	12.00	\$47,741	# mos =	0.00	\$0
	LOE Yr 1 =	12.00	person months									
	# of staff =	1.0										
SUB-TOTAL Salary=					\$46,350	% effort =	100.000%	\$47,741	% effort =	0.000%	\$0	
ERE					\$19,430			\$20,613		\$0		
Total Salary & ERE					\$65,780	# of staff =	1.0	\$68,354	# of staff =	1.0	\$0	
Staff: Data Manager	FY Salary:	\$50,000	\$4,292	1.00	50.000%	\$2,146	# mos =	1.00	\$2,210	# mos =	0.00	\$0
	LOE Yr 1 =	0.50	person months									
	# of staff =	1.0										
SUB-TOTAL Salary=					\$2,146	% effort =	50.000%	\$2,210	% effort =	0.000%	\$0	
ERE					\$900			\$954		\$0		
Total Salary & ERE					\$3,046	# of staff =	1.0	\$3,164	# of staff =	1.0	\$0	
Staff	FY Salary:	\$0	\$0	0.00	0.000%	\$0	# mos =	0.00	\$0	# mos =	0.00	\$0
	LOE Yr 1 =	0.00	person months									
	# of staff =	0.0										
SUB-TOTAL Salary=					\$0	% effort =	0.000%	\$0	% effort =	0.000%	\$0	
ERE					\$0			\$0		\$0		
Total Salary & ERE					\$0	# of staff =	0.0	\$0	# of staff =	0.0	\$0	
Administrative Staff	FY Salary:	\$0	\$0	0.00	0.000%	\$0	# mos =	0.00	\$0	# mos =	0.00	\$0
	LOE Yr 1 =	0.00	person months									
	# of staff =	0.0										
SUB-TOTAL Salary=					\$0	% effort =	0.000%	\$0	% effort =	0.000%	\$0	
ERE					\$0			\$0		\$0		
Total Salary & ERE					\$0	# of staff =	0.0	\$0	# of staff =	0.0	\$0	
<b>Sub-Total Staff Salaries</b>					\$48,496			\$49,951		\$0		

Step 2: Insert the copied cells on the next line down (here, row 52).

Post Doctoral Associate														
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	<b>PROPOSAL BUDGET</b>	<b>Start Date:</b>	2/1/2014	<b>Sponsor:</b>		<b>ASU ARIZONA STATE UNIVERSITY</b>								
2	Year 1 Total =	\$362,501	<b>End Date:</b>	1/31/2016	<b>NSF</b>									
3	Summary Budget =	\$703,772	<b>CLICK THIS AFTER Updating Start Date</b>				<b>Year 1</b>	<b>Year 2</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 3</b>	<b>Su</b>		
41	Count =	0			SUB-TOTAL Salary=	\$0	AY LOE =	0.00	\$0	AY LOE =	0.00	\$0		
42					ERE	\$0	Sum LOE =	0.00	\$0	Sum LOE =	0.00	\$0		
43					Total Salary & ERE	\$0	LOE =	0.00	\$0	LOE =	0.00	\$0		
44	<b>Sub-Total Faculty Salaries</b>		<b>2 = # of senior personnel</b>			<b>\$14,477</b>			<b>\$14,912</b>			<b>\$0</b>		
45	<b>Staff Salaries</b>													
46	Post Doctoral Associate	FY Salary:	\$45,000	\$3,863	12.00	100.000%	\$46,350	# mos =	12.00	\$47,741	# mos =	0.00	\$0	
47	LOE Yr 1 =	12.00 person months						% effort =	100.000%	\$47,741	% effort =	0.000%	\$0	
48	# of staff =	1.0			SUB-TOTAL Salary=	\$46,350	% effort =	100.000%	\$47,741	% effort =	0.000%	\$0		
49					ERE	\$19,430	LOE =	12.00	\$20,613	LOE =	0.00	\$0		
50					Total Salary & ERE	\$65,780	# of staff =	1.0	\$68,354	# of staff =	1.0	\$0		
51														
52	Post Doctoral Associate	FY Salary:	\$45,000	\$3,863	12.00	100.000%	\$46,350	# mos =	12.00	\$47,741	# mos =	0.00	\$0	
53	LOE Yr 1 =	12.00 person months						% effort =	100.000%	\$47,741	% effort =	0.000%	\$0	
54	# of staff =	1.0			SUB-TOTAL Salary=	\$46,350	% effort =	100.000%	\$47,741	% effort =	0.000%	\$0		
55					ERE	\$19,430	LOE =	12.00	\$20,613	LOE =	0.00	\$0		
56					Total Salary & ERE	\$65,780	# of staff =	1.0	\$68,354	# of staff =	1.0	\$0		
57														
58	Staff: Data Manager	FY Salary:	\$50,000	\$4,292	1.00	50.000%	\$2,146	# mos =	1.00	\$2,210	# mos =	0.00	\$0	
59	LOE Yr 1 =	0.50 person months						% effort =	50.000%	\$2,210	% effort =	0.000%	\$0	
60	# of staff =	1.0			SUB-TOTAL Salary=	\$2,146	% effort =	50.000%	\$2,210	% effort =	0.000%	\$0		
61					ERE	\$900	LOE =	0.50	\$954	LOE =	0.00	\$0		
62					Total Salary & ERE	\$3,046	# of staff =	1.0	\$3,164	# of staff =	1.0	\$0		
63														
64	Staff	FY Salary:	\$0	\$0	0.00	0.000%	\$0	# mos =	0.00	\$0	# mos =	0.00	\$0	
65	LOE Yr 1 =	0.00 person months						% effort =	0.000%	\$0	% effort =	0.000%	\$0	
66	# of staff =	0.0			SUB-TOTAL Salary=	\$0	% effort =	0.000%	\$0	% effort =	0.000%	\$0		
67					ERE	\$0	LOE =	0.00	\$0	LOE =	0.00	\$0		
68					Total Salary & ERE	\$0	# of staff =	0.00	\$0	# of staff =	0.00	\$0		

**Step 3:** Update the second Post Doctoral Associate information per budget figures.

Post Doctoral Associate										Year 1	Year 2	Year 2	Year 3	Year 3	Su	
<b>PROPOSAL BUDGET</b>		<b>Start Date:</b> 2/1/2014	<b>Sponsor:</b> NSF		<b>ASU ARIZONA STATE UNIVERSITY</b>											
Year 1 Total =	\$340,553	<b>End Date:</b> 1/31/2016														
Summary Budget =	\$659,015	<b>CLICK THIS AFTER Updating Start Date</b>														
Count =	0															
<b>Sub-Total Faculty Salaries</b>		<b>2 = # of senior personnel</b>														
<b>Staff Salaries</b>																
Post Doctoral Associate	FY Salary: \$45,000	\$3,863	12.00	100.00%	\$46,350	# mos = 12.00	\$47,741	# mos = 0.00	\$0							
LOE Yr 1 =	12.00 person months															
# of staff =	1.0															
Post Doctoral Associate	FY Salary: \$47,000	\$4,034	9.00	100.00%	\$36,308	# mos = 9.00	\$37,397	# mos = 0.00	\$0							
LOE Yr 1 =	9.00 person months															
# of staff =	1.0															
Staff: Data Manager	FY Salary: \$50,000	\$4,292	1.00	50.00%	\$2,146	# mos = 1.00	\$2,210	# mos = 0.00	\$0							
LOE Yr 1 =	0.50 person months															
# of staff =	1.0															
Staff	FY Salary: \$0	\$0	0.00	0.00%	\$0	# mos = 0.00	\$0	# mos = 0.00	\$0							
LOE Yr 1 =	0.00 person months															
# of staff =	0.0															

Once an additional staff position line has been added, the Budget Summary (tab 1) will also need to be updated to include this addition. If using Cost Sharing and Cost Share Summary for this proposal, those tabs will also need to be updated.

**Step 1: Copy the Post Doctoral Associate’s three-line block.**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
													Year 1	Year 2	Year 3				Summary									
4																												
5			<b>Senior Personnel</b>																									
6			PI: Paul Irving			Yr 1	1	@	12.00	P-Mos per year			\$8,755	\$9,018	\$0				\$17,773									
7						Yr 2	1	@	12.00	P-Mos per year																		
8						Yr 3	0	@	0.00	P-Mos per year																		
9			Co-PI: Connie Owen			Yr 1	1	@	0.50	P-Mos per year			\$5,722	\$5,894	\$0				\$11,616									
10						Yr 2	1	@	0.50	P-Mos per year																		
11						Yr 3	0	@	0.00	P-Mos per year																		
12			Co-PI:			Yr 1	0	@	0.00	P-Mos per year			\$0	\$0	\$0				\$0									
13						Yr 2	0	@	0.00	P-Mos per year																		
14						Yr 3	0	@	0.00	P-Mos per year																		
15			Co-PI:			Yr 1	0	@	0.00	P-Mos per year			\$0	\$0	\$0				\$0									
16						Yr 2	0	@	0.00	P-Mos per year																		
17						Yr 3	0	@	0.00	P-Mos per year																		
18			Co-PI:			Yr 1	0	@	0.00	P-Mos per year			\$0	\$0	\$0				\$0									
19						Yr 2	0	@	0.00	P-Mos per year																		
20						Yr 3	0	@	0.00	P-Mos per year																		
21																												
22													Total Senior Personnel	\$14,477	\$14,912	\$0			\$29,389									
23																												
24			<b>Other Personnel*</b>																									
25			Post Doctoral Associate			Yr 1	1	@	12.00	P-Mos per year			\$46,350	\$47,741	\$0				\$94,091									
26						Yr 2	1	@	12.00	P-Mos per year																		
27						Yr 3	1	@	0.00	P-Mos per year																		
28			Staff: Data Manager			Yr 1	1	@	0.50	P-Mos per year			\$2,146	\$2,210	\$0				\$4,356									
29						Yr 2	1	@	0.50	P-Mos per year																		
30						Yr 3	1	@	0.00	P-Mos per year																		
31			Staff			Yr 1	0	@	0.00	P-Mos per year			\$0	\$0	\$0				\$0									
32						Yr 2	0	@	0.00	P-Mos per year																		
33						Yr 3	0	@	0.00	P-Mos per year																		
34			Administrative Staff			Yr 1	0	@	0.00	P-Mos per year			\$0	\$0	\$0				\$0									
35						Yr 2	0	@	0.00	P-Mos per year																		
36						Yr 3	0	@	0.00	P-Mos per year																		
37			Grad Students - PhD			Yr 1	0	@	0.00	P-Mos per year			\$0	\$0	\$0				\$0									

Step 2: Insert the copied cells on the next line down (here, row 28).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	RS	T	U	V	W	X	Y	Z	AA	AB
													Year 1	Year 2	Year 3		Summary										
4																											
5			<b>Senior Personnel</b>																								
6			PI: Paul Irving			Yr 1	0.90	P-Mos per year					\$8,755	\$9,018	\$0		\$17,773										
7						Yr 2	0.90	P-Mos per year																			
8						Yr 3	0.00	P-Mos per year																			
9			Co-PI: Connie Owen			Yr 1	0.50	P-Mos per year					\$5,722	\$5,894	\$0		\$11,616										
10						Yr 2	0.50	P-Mos per year																			
11						Yr 3	0.00	P-Mos per year																			
12			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0		\$0										
13						Yr 2	0.00	P-Mos per year																			
14						Yr 3	0.00	P-Mos per year																			
15			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0		\$0										
16						Yr 2	0.00	P-Mos per year																			
17						Yr 3	0.00	P-Mos per year																			
18			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0		\$0										
19						Yr 2	0.00	P-Mos per year																			
20						Yr 3	0.00	P-Mos per year																			
21																											
22																											
23																											
24			<b>Other Personnel*</b>																								
25			Post Doctoral Associate			Yr 1	1	@	12.00	P-Mos per year			\$46,350	\$47,741	\$0		\$94,091										
26						Yr 2	1	@	12.00	P-Mos per year																	
27						Yr 3	1	@	0.00	P-Mos per year																	
28			0			Yr 1	0	@	0.00	P-Mos per year			\$65,780	\$68,354	\$0		\$134,134										
29						Yr 2	1	@	0.00	P-Mos per year																	
30						Yr 3	0	@	0.00	P-Mos per year																	
31			Staff: Data Manager			Yr 1	1	@	0.50	P-Mos per year			\$2,146	\$2,210	\$0		\$4,356										
32						Yr 2	1	@	0.50	P-Mos per year																	
33						Yr 3	1	@	0.00	P-Mos per year																	
34			Staff			Yr 1	0	@	0.00	P-Mos per year			\$0	\$0	\$0		\$0										
35						Yr 2	0	@	0.00	P-Mos per year																	
36						Yr 3	0	@	0.00	P-Mos per year																	
37			Administrative Staff			Yr 1	0	@	0.00	P-Mos per year			\$0	\$0	\$0		\$0										

**Step 3:** Update the formula in column C to reference the second Post Doctoral Associate line from the Budget Worksheet (here, line 52). Cell will now autofill with position name as listed on the Budget Worksheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	RS	T	U	V	W	X	Y	Z	AA	AB
													Year 1	Year 2	Year 3				Summary								
4																											
5			<b>Senior Personnel</b>																								
6			PI: Paul Irving			Yr 1	0.90	P-Mos per year					\$8,755	\$9,018	\$0				\$17,773								
7						Yr 2	0.90	P-Mos per year																			
8						Yr 3	0.00	P-Mos per year																			
9			Co-PI: Connie Owen			Yr 1	0.50	P-Mos per year					\$5,722	\$5,894	\$0				\$11,616								
10						Yr 2	0.50	P-Mos per year																			
11						Yr 3	0.00	P-Mos per year																			
12			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0				\$0								
13						Yr 2	0.00	P-Mos per year																			
14						Yr 3	0.00	P-Mos per year																			
15			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0				\$0								
16						Yr 2	0.00	P-Mos per year																			
17						Yr 3	0.00	P-Mos per year																			
18			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0				\$0								
19						Yr 2	0.00	P-Mos per year																			
20						Yr 3	0.00	P-Mos per year																			
21																											
22						Total Senior Personnel						\$14,477	\$14,912	\$0				\$29,389									
23																											
24			<b>Other Personnel*</b>																								
25			Post Doctoral Associate		Yr 1	1	@	12.00	P-Mos per year				\$46,350	\$47,741	\$0				\$94,091								
26					Yr 2	1	@	12.00	P-Mos per year																		
27					Yr 3	1	@	0.00	P-Mos per year																		
28			Post Doctoral Associate		Yr 1	0	@	0.00	P-Mos per year				\$65,780	\$68,354	\$0				\$134,134								
29					Yr 2	1	@	0.00	P-Mos per year																		
30					Yr 3	0	@	0.00	P-Mos per year																		
31			Staff: Data Manager		Yr 1	1	@	0.50	P-Mos per year				\$2,146	\$2,210	\$0				\$4,356								
32					Yr 2	1	@	0.50	P-Mos per year																		
33					Yr 3	1	@	0.00	P-Mos per year																		
34			Staff		Yr 1	0	@	0.00	P-Mos per year				\$0	\$0	\$0				\$0								
35					Yr 2	0	@	0.00	P-Mos per year																		
36					Yr 3	0	@	0.00	P-Mos per year																		
37			Administrative Staff		Yr 1	0	@	0.00	P-Mos per year				\$0	\$0	\$0				\$0								

**Step 4:** Now update the person-months per year formulas. The Budget Worksheet cells to be referenced are those for LOE and # of staff (here, found in cells B54 and B53 for Year One, J57 and J56 for Year Two, and M57 and M56 for Year Three).

The screenshot shows an Excel spreadsheet titled "Guide Budget - Microsoft Excel" with the following data:

PROPOSAL BUDGET		Start Date: 2/1/2014	Sponsor: NSF		ASU ARIZONA STATE UNIVERSITY					
Year 1 Total = \$340,553		End Date: 1/31/2016	CLICK THIS AFTER Updating Start Date		Year 1	Year 2	Year 2	Year 3	Year 3	Su
Summary Budget =	\$659,015									
Count =	0									
Sub-TOTAL Salary=					\$0	AY LOE = 0.00	\$0	AY LOE = 0.00	\$0	
ERE					\$0	Sum LOE = 0.00	\$0	Sum LOE = 0.00	\$0	
Total Salary & ERE					\$0	LOE = 0.00	\$0	LOE = 0.00	\$0	
Sub-Total Faculty Salaries 2 = # of senior personnel					\$14,477		\$14,912		\$0	
<b>Staff Salaries</b>										
Post Doctoral Associate	FY Salary: \$45,000	\$3,863	12.00	100.000%	\$46,350	# mos = 12.00	\$47,741	# mos = 0.00	\$0	
LOE Yr 1 =	12.00 person months									
# of staff =	1.0									
Sub-TOTAL Salary=					\$46,350	% effort = 100.000%	\$47,741	% effort = 0.000%	\$0	
ERE					\$19,430		\$20,613		\$0	
Total Salary & ERE					\$65,780	LOE = 12.00	\$68,354	LOE = 0.00	\$0	
Post Doctoral Associate	FY Salary: \$47,000	\$4,034	9.00	100.000%	\$36,308	# of staff = 1.0	\$37,397	# of staff = 1.0	\$0	
LOE Yr 1 =	9.00 person months									
# of staff =	1.0									
Sub-TOTAL Salary=					\$36,308	% effort = 100.000%	\$37,397	% effort = 0.000%	\$0	
ERE					\$15,220		\$16,147		\$0	
Total Salary & ERE					\$51,528	LOE = 9.00	\$53,544	LOE = 0.00	\$0	
Staff: Data Manager	FY Salary: \$50,000	\$4,292	1.00	50.000%	\$2,146	# of staff = 1.0	\$2,210	# of staff = 0.00	\$0	
LOE Yr 1 =	0.50 person months									
# of staff =	1.0									
Sub-TOTAL Salary=					\$2,146	% effort = 50.000%	\$2,210	% effort = 0.000%	\$0	
ERE					\$900		\$954		\$0	
Total Salary & ERE					\$3,046	LOE = 0.50	\$3,164	LOE = 0.00	\$0	
Staff	FY Salary: \$0	\$0	0.00	0.000%	\$0	# of staff = 1.0	\$0	# of staff = 1.0	\$0	
LOE Yr 1 =	0.00 person months									
# of staff =	0.0									
Sub-TOTAL Salary=					\$0	% effort = 0.000%	\$0	% effort = 0.000%	\$0	
ERE					\$0		\$0		\$0	
Total Salary & ERE					\$0	LOE = 0.00	\$0	LOE = 0.00	\$0	

Enter each of these respective cell numbers into its corresponding cell on the Budget Summary.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	RS	T	U	V	W	X	Y	Z	AA	AB
													Year 1	Year 2	Year 3		Summary										
4																											
5			<b>Senior Personnel</b>																								
6			PI: Paul Irving			Yr 1	0.90	P-Mos per year					\$8,755	\$9,018	\$0		\$17,773										
7						Yr 2	0.90	P-Mos per year																			
8						Yr 3	0.00	P-Mos per year																			
9			Co-PI: Connie Owen			Yr 1	0.50	P-Mos per year					\$5,722	\$5,894	\$0		\$11,616										
10						Yr 2	0.50	P-Mos per year																			
11						Yr 3	0.00	P-Mos per year																			
12			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0		\$0										
13						Yr 2	0.00	P-Mos per year																			
14						Yr 3	0.00	P-Mos per year																			
15			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0		\$0										
16						Yr 2	0.00	P-Mos per year																			
17						Yr 3	0.00	P-Mos per year																			
18			Co-PI:			Yr 1	0.00	P-Mos per year					\$0	\$0	\$0		\$0										
19						Yr 2	0.00	P-Mos per year																			
20						Yr 3	0.00	P-Mos per year																			
21																											
22																											
23																											
24			<b>Other Personnel*</b>																								
25			Post Doctoral Associate	Yr 1	1	@	12.00	P-Mos per year					\$46,350	\$47,741	\$0		\$94,091										
26				Yr 2	1	@	12.00	P-Mos per year																			
27				Yr 3	1	@	0.00	P-Mos per year																			
28			Post Doctoral Associate	Yr 1	1	@	9.00	P-Mos per year					\$65,780	\$68,354	\$0		\$134,134										
29				Yr 2	1	@	9.00	P-Mos per year																			
30				Yr 3	1	@	0.00	P-Mos per year																			
31			Staff: Data Manager	Yr 1	1	@	0.50	P-Mos per year					\$2,146	\$2,210	\$0		\$4,356										
32				Yr 2	1	@	0.50	P-Mos per year																			
33				Yr 3	1	@	0.00	P-Mos per year																			
34			Staff	Yr 1	0	@	0.00	P-Mos per year					\$0	\$0	\$0		\$0										
35				Yr 2	0	@	0.00	P-Mos per year																			
36				Yr 3	0	@	0.00	P-Mos per year																			
37			Administrative Staff	Yr 1	0	@	0.00	P-Mos per year					\$0	\$0	\$0		\$0										

**Step 5:** Next update the formulas for the second Post Doctoral Associate's Years 1-3 and Summary columns on the Budget Summary with the corresponding Sub-Total Salary line from the Worksheet (here, 54) – note that the column reference remains the same. [The Sub-Total Salary line is used as the ERE totals for each section are brought over separately to the Budget Summary.]

The screenshot displays the Microsoft Excel interface for a budget worksheet titled "Guide Budget - Microsoft Excel". The worksheet is organized into columns A through O and rows 1 through 68. Key sections include:

- Row 1:** PROPOSAL BUDGET
- Row 2:** Year 1 Total = \$340,553
- Row 3:** Summary Budget = \$659,015
- Row 41:** Count = 0
- Row 44:** Sub-Total Faculty Salaries 2 = # of senior personnel \$14,477
- Row 45:** Staff Salaries
- Row 46:** Post Doctoral Associate FY Salary: \$45,000 \$3,863 12.00 100.000% \$46,350 # mos = 12.00 \$47,741 # mos = 0.00 \$0
- Row 47:** LOE Yr 1 = 12.00 person months
- Row 48:** # of staff = 1.0
- Row 49:** SUB-TOTAL Salary= \$46,350 % effort = 100.000% \$47,741 % effort = 0.000% \$0
- Row 50:** ERE \$19,430
- Row 51:** Total Salary & ERE \$65,780 # of staff = 1.0 \$68,354 # of staff = 1.0 \$0
- Row 52:** Post Doctoral Associate FY Salary: \$47,000 \$4,034 9.00 100.000% \$36,308 # mos = 9.00 \$37,397 # mos = 0.00 \$0
- Row 53:** LOE Yr 1 = 9.00 person months
- Row 54:** # of staff = 1.0
- Row 55:** SUB-TOTAL Salary= \$36,308 % effort = 100.000% \$37,397 % effort = 0.000% \$0
- Row 56:** ERE \$15,220
- Row 57:** Total Salary & ERE \$51,528 # of staff = 1.0 \$53,544 # of staff = 1.0 \$0
- Row 58:** Staff: Data Manager FY Salary: \$50,000 \$4,292 1.00 50.000% \$2,146 # mos = 1.00 \$2,210 # mos = 0.00 \$0
- Row 59:** LOE Yr 1 = 0.50 person months
- Row 60:** # of staff = 1.0
- Row 61:** SUB-TOTAL Salary= \$2,146 % effort = 50.000% \$2,210 % effort = 0.000% \$0
- Row 62:** ERE \$900
- Row 63:** Total Salary & ERE \$3,046 # of staff = 1.0 \$3,164 # of staff = 1.0 \$0
- Row 64:** Staff FY Salary: \$0 \$0 0.00 0.000% \$0 # mos = 0.00 \$0 # mos = 0.00 \$0
- Row 65:** LOE Yr 1 = 0.00 person months
- Row 66:** # of staff = 0.0
- Row 67:** SUB-TOTAL Salary= \$0 % effort = 0.000% \$0 % effort = 0.000% \$0
- Row 68:** ERE \$0
- Row 69:** LOE = 0.00

A red arrow points from cell H54 to cell H53, indicating a formula update. The ASU logo is visible in the background.



## ADDING ADDITIONAL STUDENT LINES TO THE BUDGET WORKSHEET

If additional Graduate Research Assistant lines are required beyond those provided, contact [RAHelp@asu.edu](mailto:RAHelp@asu.edu) for an expanded version of the Budget Worksheet, as modification of multiple sections is required, including tuition remission.

Listing multiple student positions on one line when salary amounts are the same is an option that should be utilized when possible.

You can add additional Hourly Student lines by following the steps outlined above. Remember that the Budget Summary will need to be updated, and the Cost Share tabs, when being utilized. Additions must be inserted above the last Hourly Student line to be included in the equation range for the subtotals (here, line 104).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	<b>PROPOSAL BUDGET</b>		<b>Start Date:</b> 2/1/2014			<b>Sponsor:</b>		<b>ASU ARIZONA STATE UNIVERSITY</b>							
2	Year 1 Total =	\$340,553	<b>End Date:</b> 1/31/2016			NSF									
3	Summary Budget =	\$659,015	CLICK THIS AFTER Updating Start Date					<b>Year 1</b>	<b>Year 2</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 3</b>	<b>Year 3</b>	<b>Year 3</b>	<b>Su</b>
88	Sum LOE Yr 1 =	0.00	person months		\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	
89	Total LOE Yr 1 =	0.00							# of stdts =	0		# of stdts =	0		
90	# of AY stdts =	0.0						SUB-TOTAL Salary=	\$0	AY LOE =	0.00	\$0	AY LOE =	0.00	\$0
91	# of sum stdts =	0.0						ERE	\$0	Sum LOE =	0.00	\$0	Sum LOE =	0.00	\$0
92										LOE =	0.00		LOE =	0.00	
93								<b>Total Salary &amp; ERE</b>	<b>\$0</b>			<b>\$0</b>		<b>\$0</b>	
94	<b>Sub-Total GRA Salaries</b>							<b>\$23,333</b>		<b>\$24,033</b>		<b>\$0</b>		<b>\$0</b>	
95	<b>Hourly Students</b>		AY Salary:	\$0	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	
96	Hourly Students		AY LOE Yr 1 =	0.00	person months				# of stdts =	0		# of stdts =	0		
97	Sum LOE Yr 1 =	0.00	person months		\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	
98	Total LOE Yr 1 =	0.00							# of stdts =	0		# of stdts =	0		
99	# of AY stdts =	0.0						SUB-TOTAL Salary=	\$0	AY LOE =	0.00	\$0	AY LOE =	0.00	\$0
100	# of sum stdts =	0.0						ERE	\$0	Sum LOE =	0.00	\$0	Sum LOE =	0.00	\$0
101										LOE =	0.00		LOE =	0.00	
102								<b>Total Salary &amp; ERE</b>	<b>\$0</b>			<b>\$0</b>		<b>\$0</b>	
103															
104	<b>Hourly Students</b>		AY Salary:	\$0	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	
105	AY LOE Yr 1 =	0.00	person months						# of stdts =	0		# of stdts =	0		
106	Sum LOE Yr 1 =	0.00	person months		\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	0.00	0.000%	\$0	
107	Total LOE Yr 1 =	0.00							# of stdts =	0		# of stdts =	0		
108	# of AY stdts =	0.0						SUB-TOTAL Salary=	\$0	AY LOE =	0.00	\$0	AY LOE =	0.00	\$0
109	# of sum stdts =	0.0						ERE	\$0	Sum LOE =	0.00	\$0	Sum LOE =	0.00	\$0
110										LOE =	0.00		LOE =	0.00	
111								<b>Total Salary &amp; ERE</b>	<b>\$0</b>			<b>\$0</b>		<b>\$0</b>	
112	<b>Sub-Total Hourly Salaries</b>							<b>\$0</b>		<b>\$0</b>		<b>\$0</b>		<b>\$0</b>	

## ADDING ADDITIONAL SUBCONTRACTORS

**Step 1:** Copy the third Sub-Recipient row (here, 143). Note: by selecting other than the last sub-recipient line, the sum formula will automatically adjust the range to include the new addition).

PROPOSAL BUDGET		Date:	Sponsor:		Year 1	Year 2	Year 3	Year 3	Summary
1	Year 1 Total =	\$0	Budget #:						
3	Summary Budget =	\$0	Duration:						
127	7310-80 Computer Use Fees				\$0	\$0	\$0	\$0	\$0
128	7320-01 Office Supplies				\$0	\$0	\$0	\$0	\$0
129	7320-05 Materials & Lab Supplies				\$0	\$0	\$0	\$0	\$0
130	7320-48 Computer Software				\$0	\$0	\$0	\$0	\$0
131	7325-22 Lab Equipment under \$5,000				\$0	\$0	\$0	\$0	\$0
132	7330-01 Postage/Express Mail/Airborne				\$0	\$0	\$0	\$0	\$0
133	7330-06 Telephone/FAX				\$0	\$0	\$0	\$0	\$0
134	7390-16 Computer Connect Charges				\$0	\$0	\$0	\$0	\$0
135	Rental/Equipment Use Fees				\$0	\$0	\$0	\$0	\$0
136	Other				\$0	\$0	\$0	\$0	\$0
137	<b>TOTAL OTHER DIRECT COSTS</b>	<b>\$0</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
138	<b>I.D. MODIFIED TOTAL DIRECT COSTS</b>	<b>\$0</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
139	<b>CAPITAL EQUIPMENT</b>	<b>\$0</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
140	Tuition Remission 7200-48				\$0	\$0	\$0	\$0	\$0
141	Sub-Recipient(s)		Insert Name >		\$0	\$0	\$0	\$0	\$0
142			Insert Name >		\$0	\$0	\$0	\$0	\$0
143			Insert Name >		\$0	\$0	\$0	\$0	\$0
144			Insert Name >		\$0	\$0	\$0	\$0	\$0
145	<b>TOTAL Sub-Recipients</b>	<b>\$0</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
146	Participant Support Stipends		Indicate total number of participants here >		\$0	\$0	\$0	\$0	\$0
147	Costs Travel				\$0	\$0	\$0	\$0	\$0
148	Subsistence				\$0	\$0	\$0	\$0	\$0
149	Other				\$0	\$0	\$0	\$0	\$0
150	<b>TOTAL</b>	<b>\$0</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
151	Scholarships		Insert # students >	0	Insert \$ >	\$0	\$0	\$0	\$0
152	<b>I.E. TOTAL DIRECT COSTS</b>	<b>\$0</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

Step 2: Insert the copied cells on the next line down (here, line 144).

Budget Worksheet Three Year Template with ERE FY12-FY14 [Read-Only] [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Acrobat

Normal Page Layout Page Break Custom Full Gridlines Formula Bar Message Bar Ruler Gridlines Headings Zoom 100% Zoom to Selection New Window Arrange All Freeze Panes Hide Unhide View Side by Side Synchronous Scrolling Reset Window Position Save Switch Workspace Windows Macros

A144

1	PROPOSAL BUDGET		Date:	Sponsor:	ASU ARIZONA STATE UNIVERSITY															
2	Year 1 Total =	\$0	Budget #:		Year 1	Year 2	Year 2	Year 3	Year 3	Summary										
3	Summary Budget =	\$0	Duration:																	
127	7310-80	Computer Use Fees			\$0		\$0			\$0										
128	7320-01	Office Supplies			\$0		\$0			\$0										
129	7320-05	Materials & Lab Supplies			\$0		\$0			\$0										
130	7320-48	Computer Software			\$0		\$0			\$0										
131	7325-22	Lab Equipment under \$5,000			\$0		\$0			\$0										
132	7330-01	Postage/Express Mail/Airborne			\$0		\$0			\$0										
133	7330-06	Telephone/FAX			\$0		\$0			\$0										
134	7390-16	Computer Connect Charges			\$0		\$0			\$0										
135		Rental/Equipment Use Fees			\$0		\$0			\$0										
136		Other			\$0		\$0			\$0										
137	<b>TOTAL OTHER DIRECT COSTS</b>				\$0		\$0			\$0										
138	<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>				\$0		\$0			\$0										
139	<b>CAPITAL EQUIPMENT</b>				\$0		\$0			\$0										
140	Tuition Remission	7200-48			\$0		\$0			\$0										
141	Sub-Recipient(s)			Insert Name>	\$0		\$0			\$0										
142				Insert Name>	\$0		\$0			\$0										
143				Insert Name>	\$0		\$0			\$0										
144				Insert Name>	\$0		\$0			\$0										
145				Insert Name>	\$0		\$0			\$0										
146	<b>TOTAL Sub-Recipients</b>				\$0		\$0			\$0										
147	Participant Support	Stipends		Indicate total number of participants here>	\$0		\$0			\$0										
148	Costs	Travel			\$0		\$0			\$0										
149		Subsistence			\$0		\$0			\$0										
150		Other			\$0		\$0			\$0										
151	<b>TOTAL</b>				\$0		\$0			\$0										
152	Scholarships			Insert # students >	0		Insert \$ >	\$0		\$0										
153	<b>1.E. TOTAL DIRECT COSTS</b>				\$0		\$0			\$0										

**Step 3:** The F&A calculation on total subrecipients must be manually updated to include the additional subrecipient row. Go to the F&A Costs for Subs cell for Year 1 (here, H157). Copy the first segment of the formula, from just after the = sign up to the + sign:

The screenshot shows the Microsoft Excel interface with the following details:

- Formula Bar:** 
$$=IF(\$H\$144<=25000,\$H\$144*\$E\$157,(E157*25000))+IF(\$H\$143<=25000,\$H\$143*\$E\$157,(E157*25000))+IF(\$H\$142<=25000,\$H\$142*\$E\$157,(E157*25000))+IF(\$H\$141<=25000,$$
- Worksheet Content:**

		Year 1	Year 2	Year 3	Year 3	Summary
<b>PROPOSAL BUDGET</b>						
130	7320-48 Computer Software	\$0	\$0	\$0	\$0	\$0
131	7325-22 Lab Equipment under \$5,000	\$0	\$0	\$0	\$0	\$0
132	7330-01 Postage/Express Mail/Airborne	\$0	\$0	\$0	\$0	\$0
133	7330-06 Telephone/FAX	\$0	\$0	\$0	\$0	\$0
134	7390-16 Computer Connect Charges	\$0	\$0	\$0	\$0	\$0
135	Rental/Equipment Use Fees	\$0	\$0	\$0	\$0	\$0
136	Other	\$0	\$0	\$0	\$0	\$0
<b>TOTAL OTHER DIRECT COSTS</b>		\$0	\$0	\$0	\$0	\$0
<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>		\$0	\$0	\$0	\$0	\$0
<b>CAPITAL EQUIPMENT</b>		\$0	\$0	\$0	\$0	\$0
140	Tuition Remission 7200-48	\$0	\$0	\$0	\$0	\$0
141	Sub-Recipient(s)	\$0	\$0	\$0	\$0	\$0
142		\$0	\$0	\$0	\$0	\$0
143		\$0	\$0	\$0	\$0	\$0
144		\$0	\$0	\$0	\$0	\$0
145		\$0	\$0	\$0	\$0	\$0
145	Sub-Recipient(s) LIA	\$10,000	\$10,000	\$10,000	\$30,000	\$30,000
<b>TOTAL Sub-Recipients</b>		\$10,000	\$10,000	\$10,000	\$30,000	\$30,000
147	Participant Support Costs	\$0	\$0	\$0	\$0	\$0
148	Slipends	\$0	\$0	\$0	\$0	\$0
149	Travel	\$0	\$0	\$0	\$0	\$0
149	Subsistence	\$0	\$0	\$0	\$0	\$0
150	Other	\$0	\$0	\$0	\$0	\$0
151	<b>TOTAL</b>	\$0	\$0	\$0	\$0	\$0
152	Scholarships	\$0	\$0	\$0	\$0	\$0
<b>1.E. TOTAL DIRECT COSTS</b>		\$0	\$0	\$0	\$0	\$0
154	<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>	\$0	\$0	\$0	\$0	\$0
155	52.5% MTDC Year 1					
156	52.5% MTDC Year 2					
156	52.5% MTDC Year 3					
157	for Subs = see note	\$0	\$0	\$0	\$0	\$0
<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>		\$0	\$0	\$0	\$0	\$0
<b>3. TOTAL PROJECT COSTS</b>		\$0	\$0	\$0	\$0	\$0

**Step 4:** Paste that copy at the front of the formula immediately following the = sign and then update that segment to correspond to the row number of the additional subrecipient (here, 145):

The screenshot shows the Microsoft Excel interface with the following details:

- Title Bar:** adding subs [Compatibility Mode] - Microsoft Excel
- Formula Bar:** =IF(\$H\$145<=25000,\$H\$145\*\$E\$157,(E157\*25000))+IF(\$H\$144<=25000,\$H\$144\*\$E\$157,(E157\*25000))+IF(\$H\$143<=25000,\$H\$143\*\$E\$157,(E157\*25000))+IF(\$H\$142<=25000,
- Worksheet:**
  - Row 1:** PROPOSAL BUDGET
  - Row 2:** Year 1 Total = \$5,250
  - Row 3:** Summary Budget = \$5,250
  - Columns:** Year 1, Year 2, Year 3, Year 3, Summary
  - Row 137:** TOTAL OTHER DIRECT COSTS
  - Row 138:** 1.D. MODIFIED TOTAL DIRECT COSTS
  - Row 139:** CAPITAL EQUIPMENT
  - Row 140:** Tuition Remission 7200-48
  - Row 141-144:** Sub-Recipient(s) with "Insert Name" placeholders.
  - Row 145:** Sub-Recipient with "Insert Name" and "LIA" label, values of \$10,000 for Year 2 and Year 3, and \$30,000 for Summary.
  - Row 146:** TOTAL Sub-Recipients
  - Row 147-151:** Participant Support Costs (Slipends, Travel, Subsistence, Other, TOTAL)
  - Row 152:** Scholarships
  - Row 153:** 1.E. TOTAL DIRECT COSTS
  - Row 154-156:** FACILITIES & ADMINISTRATIVE COSTS (F&A) with 52.5% MTDC for Years 1, 2, and 3.
  - Row 157:** for Subs = see note, value of \$5,250
  - Row 158:** 2. TOTAL FACILITIES & ADMINISTRATIVE COSTS (F&A)
  - Row 159:** 3. TOTAL PROJECT COSTS

**Step 5:** In Years 2 and 3, updating the F&A Costs for Subs formula is slightly different. Note that the formula in each of these cells begins with “ROUND” and starts with the first subrecipient row number (here, 141):

The screenshot displays the Microsoft Excel interface for a budget worksheet titled "Budget Worksheet Three Year Template with ERE FY12-FY14\_subs [Compatibility Mode]". The formula bar at the top shows the following formula:

$$=ROUND(IF(\$K\$141>0,IF(\$H\$141<25000,IF((\$H\$141+\$K\$141)>25000,(25000-\$H\$141)*\$E\$157,\$K\$141*\$E\$157),0),0)+ROUND(IF(\$K\$142>0,IF(\$H\$142<25000,IF((\$H\$142+\$K\$142)>25000,(25000-\$H\$142)*\$E\$157,\$K\$142*\$E\$157),0),0))$$

The spreadsheet content includes the following categories and values:

	Year 1	Year 2	Year 3	Year 3	Summary
<b>PROPOSAL BUDGET</b>					
Year 1 Total =	\$5,250				
Summary Budget =	\$5,250				
7320-48 Computer Software	\$0	\$0	\$0	\$0	\$0
7325-22 Lab Equipment under \$5,000	\$0	\$0	\$0	\$0	\$0
7330-01 Postage/Express Mail/Airborne	\$0	\$0	\$0	\$0	\$0
7330-06 Telephone/FAX	\$0	\$0	\$0	\$0	\$0
7390-16 Computer Connect Charges	\$0	\$0	\$0	\$0	\$0
Rental/Equipment Use Fees	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0
<b>TOTAL OTHER DIRECT COSTS</b>	\$0	\$0	\$0	\$0	\$0
<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>	\$0	\$0	\$0	\$0	\$0
<b>CAPITAL EQUIPMENT</b>	\$0	\$0	\$0	\$0	\$0
Tuition Remission 7200-48	\$0	\$0	\$0	\$0	\$0
Sub-Recipient(s)	Insert Name	\$0	\$0	\$0	\$0
	Insert Name	\$0	\$0	\$0	\$0
	Insert Name	\$0	\$0	\$0	\$0
	Insert Name	\$0	\$0	\$0	\$0
	Insert Name: University of Arizona	\$10,000	\$10,000	\$10,000	\$30,000
<b>TOTAL Sub-Recipients</b>	\$10,000	\$10,000	\$10,000	\$10,000	\$30,000
Participant Support Costs	Slipends Indicate total number of participants here	\$0	\$0	\$0	\$0
	Travel	\$0	\$0	\$0	\$0
	Subsistence	\$0	\$0	\$0	\$0
	Other	\$0	\$0	\$0	\$0
<b>TOTAL</b>	\$0	\$0	\$0	\$0	\$0
Scholarships	Insert # students > 0 Insert \$ >	\$0	\$0	\$0	\$0
<b>1.E. TOTAL DIRECT COSTS</b>	\$0	\$0	\$0	\$0	\$0
<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>	\$0	\$0	\$0	\$0	\$0
	52.5% MTDC Year 1				
	52.5% MTDC Year 2				
	52.5% MTDC Year 3				
for Subs = see note	52.5% of first \$25,000	\$5,250	\$0	\$0	\$5,250
<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>	\$5,250	\$0	\$0	\$0	\$5,250
<b>3. TOTAL PROJECT COSTS</b>	\$5,250	\$0	\$0	\$0	\$5,250

**Step 6:** In the Year 2 cell, go to the top of the formula and copy the first full segment, from just after the = sign up to the + sign:

The screenshot shows the Microsoft Excel interface with the following data visible in the worksheet:

	Year 1	Year 2	Year 2	Year 3	Year 3	Summary
130 7320-48 Computer Software	\$0		\$0		\$0	\$0
131 7325-22 Lab Equipment under \$5,000	\$0		\$0		\$0	\$0
132 7330-01 Postage/Express Mail/Airborne	\$0		\$0		\$0	\$0
133 7330-06 Telephone/FAX	\$0		\$0		\$0	\$0
134 7330-16 Computer Connect Charges	\$0		\$0		\$0	\$0
135 Rental/Equipment Use Fees	\$0		\$0		\$0	\$0
136 Other	\$0		\$0		\$0	\$0
<b>TOTAL OTHER DIRECT COSTS</b>	<b>\$0</b>		<b>\$0</b>		<b>\$0</b>	<b>\$0</b>
<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>	<b>\$0</b>		<b>\$0</b>		<b>\$0</b>	<b>\$0</b>
<b>CAPITAL EQUIPMENT</b>	<b>\$0</b>		<b>\$0</b>		<b>\$0</b>	<b>\$0</b>
140 Tuition Remission 7200-48	\$0		\$0		\$0	\$0
141 Sub-Recipient(s)	Insert Name		\$0		\$0	\$0
142	Insert Name		\$0		\$0	\$0
143	Insert Name		\$0		\$0	\$0
144	Insert Name		\$0		\$0	\$0
145	Insert Name: University of Arizona		\$10,000		\$10,000	\$30,000
146 <b>TOTAL Sub-Recipients</b>			<b>\$10,000</b>		<b>\$10,000</b>	<b>\$30,000</b>
147 Participant Support	Stipends Indicate total number of participants here:		\$0		\$0	\$0
148 Costs	Travel		\$0		\$0	\$0
149	Subsistence		\$0		\$0	\$0
150	Other		\$0		\$0	\$0
151 <b>TOTAL</b>			<b>\$0</b>		<b>\$0</b>	<b>\$0</b>
152 Scholarships	Insert # students > 0 Insert \$ >	\$0	\$0		\$0	\$0
153 <b>1.E. TOTAL DIRECT COSTS</b>			<b>\$0</b>		<b>\$0</b>	<b>\$0</b>
154 <b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>			\$0		\$0	\$0
155	52.5% MTDC Year 1					
156	52.5% MTDC Year 2					
157	52.5% MTDC Year 3					
157	for Subs = see note		\$5,250		\$0	\$5,250
158 <b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>			<b>\$5,250</b>		<b>\$0</b>	<b>\$5,250</b>
159 <b>3. TOTAL PROJECT COSTS</b>			<b>\$5,250</b>		<b>\$0</b>	<b>\$5,250</b>

Step 7: Go to the end of the formula, add a + sign, then paste in the copied segment:

The screenshot shows the Microsoft Excel interface with the following details:

- Title Bar:** Budget Worksheet Three Year Template with ERE FY12-FY14\_subs [Compatibility Mode] - Microsoft Excel
- Formula Bar:**  $\text{ROUND}(\text{IF}(\text{K}\$144>0,\text{IF}(\text{H}\$144<25000,\text{IF}((\text{H}\$144+\text{K}\$144)>25000,(25000-\text{H}\$144)*\text{E}\$157,\text{K}\$144*\text{E}\$157),0),0)+\text{ROUND}(\text{IF}(\text{K}\$141>0,\text{IF}(\text{H}\$141<25000,\text{IF}((\text{H}\$141+\text{K}\$141)>$
- Worksheet Content:**
  - Row 1:** PROPOSAL BUDGET
  - Row 2:** Year 1 Total = \$5,250
  - Row 3:** Summary Budget = \$5,250
  - Columns:** Year 1, Year 2, Year 2, Year 3, Year 3, Summary
  - Row 137:** TOTAL OTHER DIRECT COSTS
  - Row 138:** 1.D. MODIFIED TOTAL DIRECT COSTS
  - Row 139:** CAPITAL EQUIPMENT
  - Row 140:** Tuition Remission 7200-48
  - Row 141-145:** Sub-Recipient(s) with names and amounts.
  - Row 146:** TOTAL Sub-Recipients
  - Row 147:** Participant Support
  - Row 148:** Costs (Travel, Subsistence, Other)
  - Row 149-151:** TOTAL
  - Row 152:** Scholarships
  - Row 153:** 1.E. TOTAL DIRECT COSTS
  - Row 154-156:** FACILITIES & ADMINISTRATIVE COSTS (F&A) with MTDC percentages.
  - Row 157:** for Subs = see note
  - Row 158:** 2. TOTAL FACILITIES & ADMINISTRATIVE COSTS (F&A)
  - Row 159:** 3. TOTAL PROJECT COSTS

**Step 8:** Now update that segment with the number of the additional subrecipient row (here, 145). Note there are six instances of “141” to be updated to “145” within the segment:

The screenshot shows the Microsoft Excel interface with the following details:

- Title Bar:** Budget Worksheet Three Year Template with ERE FY12-FY14\_subs [Compatibility Mode] - Microsoft Excel
- Formula Bar:**  $\text{ROUND}(\text{IF}(\text{K}\$144 > 0, \text{IF}(\text{H}\$144 < 25000, \text{IF}(\text{H}\$144 + \text{K}\$144) > 25000, (25000 - \text{H}\$144) * \text{E}\$157, \text{K}\$144 * \text{E}\$157), 0), 0) + \text{ROUND}(\text{IF}(\text{K}\$145 > 0, \text{IF}(\text{H}\$145 < 25000, \text{IF}(\text{H}\$145 + \text{K}\$145) > 25000, (25000 - \text{H}\$145) * \text{E}\$157, \text{K}\$145 * \text{E}\$157), 0), 0)$
- Worksheet Content:**
  - Row 1:** PROPOSAL BUDGET
  - Row 2:** Year 1 Total = \$5,250
  - Row 3:** Summary Budget = \$10,500
  - Row 137:** TOTAL OTHER DIRECT COSTS
  - Row 138:** 1.D. MODIFIED TOTAL DIRECT COSTS
  - Row 139:** CAPITAL EQUIPMENT
  - Row 140:** Tuition Remission 7200-48
  - Row 141-144:** Sub-Recipient(s) with "Insert Name" placeholders.
  - Row 145:** Sub-Recipient(s) with "Insert Name: University of Arizona" and values of \$10,000 for Year 2 and Year 3, and \$30,000 for Summary.
  - Row 146:** TOTAL Sub-Recipients
  - Row 147:** Participant Support Costs
  - Row 148-150:** Costs: Slipends, Travel, Subsistence, Other.
  - Row 151:** TOTAL
  - Row 152:** Scholarships
  - Row 153:** 1.E. TOTAL DIRECT COSTS
  - Row 154:** FACILITIES & ADMINISTRATIVE COSTS (F&A)
  - Row 155-156:** 52.5% MTDC Year 1, 52.5% MTDC Year 2, 52.5% MTDC Year 3
  - Row 157:** for Subs = see note
  - Row 158:** 2. TOTAL FACILITIES & ADMINISTRATIVE COSTS (F&A)
  - Row 159:** 3. TOTAL PROJECT COSTS

**Step 9:** Update the Year 3 cell in a similar fashion. However, note that in Year 3, the copied segment has nine instances of “141” to be updated:

The screenshot shows the Microsoft Excel interface with the following details:

- Title Bar:** Budget Worksheet Three Year Template with ERE FY12-FY14\_subs [Compatibility Mode] - Microsoft Excel
- Formula Bar:**  $=ROUND(IF($N$141>0,IF((($H$141+$K$141)<25000,IF((($H$141+$K$141+$N$141)>25000,(25000-($H$141+$K$141))*$E$157,$
- Spreadsheet Table:**

PROPOSAL BUDGET		Date:	ASU ARIZONA STATE UNIVERSITY				
Year 1 Total = \$5,250		Budget #:	Year 1	Year 2	Year 3	Year 3	Summary
7320-48	Computer Software		\$0		\$0	\$0	\$0
7325-22	Lab Equipment under \$5,000		\$0		\$0	\$0	\$0
7330-01	Postage/Express Mail/Airborne		\$0		\$0	\$0	\$0
7330-06	Telephone/FAX		\$0		\$0	\$0	\$0
7390-16	Computer Connect Charges		\$0		\$0	\$0	\$0
	Rental/Equipment Use Fees		\$0		\$0	\$0	\$0
	Other		\$0		\$0	\$0	\$0
<b>TOTAL OTHER DIRECT COSTS</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>CAPITAL EQUIPMENT</b>			\$0	\$0	\$0	\$0	\$0
Tuition Remission 7200-48			\$0	\$0	\$0	\$0	\$0
Sub-Recipient(s)			\$0	\$0	\$0	\$0	\$0
Insert Name >			\$0	\$0	\$0	\$0	\$0
Insert Name >			\$0	\$0	\$0	\$0	\$0
Insert Name >			\$0	\$0	\$0	\$0	\$0
Insert Name >			\$0	\$0	\$0	\$0	\$0
Insert Name: University of Arizona			\$10,000	\$10,000	\$10,000	\$10,000	\$30,000
<b>TOTAL Sub-Recipients</b>			<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$30,000</b>
Participant Support Costs			\$0	\$0	\$0	\$0	\$0
Slipends Indicate total number of participants here >			\$0	\$0	\$0	\$0	\$0
Travel			\$0	\$0	\$0	\$0	\$0
Subsistence			\$0	\$0	\$0	\$0	\$0
Other			\$0	\$0	\$0	\$0	\$0
<b>TOTAL</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Scholarships Insert # students > 0 Insert \$ >			\$0	\$0	\$0	\$0	\$0
<b>1.E. TOTAL DIRECT COSTS</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>			\$0	\$0	\$0	\$0	\$0
52.5% MTDC Year 1							
52.5% MTDC Year 2							
52.5% MTDC Year 3							
for Subs = see note			\$5,250	\$5,250	\$0	\$0	\$10,500
<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>			<b>\$5,250</b>	<b>\$5,250</b>	<b>\$0</b>	<b>\$0</b>	<b>\$10,500</b>
<b>3. TOTAL PROJECT COSTS</b>			<b>\$5,250</b>	<b>\$5,250</b>	<b>\$0</b>	<b>\$0</b>	<b>\$10,500</b>

Now that all three formulas have been updated to include the additional subrecipient row, the F&A calculates correctly on the first \$25,000 of this total subaward that is budgeted at \$10,000 per year.

Budget Worksheet Three Year Template with ERE FY12-FY14\_subs [Compatibility Mode] - Microsoft Excel

Formula bar:  $=\$H\$144+\$K\$144)*\$E\$157,\$N\$144*\$E\$157,0),0)+ROUND(IF(\$N\$145>0,IF((\$H\$145+\$K\$145)<25000,IF((\$H\$145+\$K\$145+\$N\$145)>25000,(25000-(\$H\$145+\$K\$145))*\$E\$157,$

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	<b>PROPOSAL BUDGET</b>		Date:	Sponsor:		<b>ASU ARIZONA STATE UNIVERSITY</b>																
2	Year 1 Total =	\$5,250	Budget #:																			
3	Summary Budget =	\$13,125	Duration:																			
130	7320-48	Computer Software																				
131	7325-22	Lab Equipment under \$5,000																				
132	7330-01	Postage/Express Mail/Airborne																				
133	7330-06	Telephone/FAX																				
134	7390-16	Computer Connect Charges																				
135		Rental/Equipment Use Fees																				
136		Other																				
137	<b>TOTAL OTHER DIRECT COSTS</b>																					\$0
138	<b>1.D. MODIFIED TOTAL DIRECT COSTS</b>																					\$0
139	<b>CAPITAL EQUIPMENT</b>																					\$0
140	Tuition Remission	7200-48																				\$0
141	Sub-Recipient(s)		Insert Name >																			\$0
142			Insert Name >																			\$0
143			Insert Name >																			\$0
144			Insert Name >																			\$0
145			Insert Name > University of Arizona					\$10,000		\$10,000				\$10,000							\$30,000	\$30,000
146	<b>TOTAL Sub-Recipients</b>							\$10,000		\$10,000				\$10,000							\$30,000	\$30,000
147	Participant Support		Indicate total number of participants here >					\$0		\$0				\$0								\$0
148	Costs	Travel						\$0		\$0				\$0								\$0
149		Subsistence						\$0		\$0				\$0								\$0
150		Other						\$0		\$0				\$0								\$0
151	<b>TOTAL</b>							\$0		\$0				\$0								\$0
152	Scholarships		Insert # students >	0	Insert \$ >	\$0		\$0		\$0				\$0								\$0
153	<b>1.E. TOTAL DIRECT COSTS</b>							\$0		\$0				\$0								\$0
154	<b>FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>							\$0		\$0				\$0								\$0
155			52.5% MTDC Year 1																			
156			52.5% MTDC Year 2																			
157			52.5% MTDC Year 3																			
157	for Subs =	see note	52.5% of first \$25,000					\$5,250		\$5,250				\$2,625							\$13,125	\$13,125
158	<b>2. TOTAL FACILITIES &amp; ADMINISTRATIVE COSTS (F&amp;A)</b>							\$5,250		\$5,250				\$2,625								\$13,125
159	<b>3. TOTAL PROJECT COSTS</b>							\$5,250		\$5,250				\$2,625								\$13,125

Once an additional Sub-Recipient line has been added, the Budget Summary (tab 1) will also need to be updated to include this addition.

**Step 1:** Copy the fourth Sub-Recipient's line.

**Step 2:** Insert it on the next line down. The formulas on this new line will automatically adjust to include the line number for the fifth Sub-Recipient from the Budget Worksheet.

		M	N	O	P	Q	RS	T	U
70	Foreign Travel	\$0	\$0	\$0	\$0	\$0			
72	<b>Total Travel</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>			
74	<b>Other Direct Costs - Included in MTDC</b>								
75	Consultants	\$0	\$0	\$0	\$0	\$0			
76	Consultant Travel	\$0	\$0	\$0	\$0	\$0			
77	Telephone, Fax, Airborne	\$0	\$0	\$0	\$0	\$0			
78	Publication/Page Charges, Photocopying	\$0	\$0	\$0	\$0	\$0			
79	Computer Use Fees	\$0	\$0	\$0	\$0	\$0			
80	Materials & Lab Supplies	\$0	\$0	\$0	\$0	\$0			
81	Computer Software	\$0	\$0	\$0	\$0	\$0			
82	Computer Connect Charges	\$0	\$0	\$0	\$0	\$0			
83	Office Supplies	\$0	\$0	\$0	\$0	\$0			
84	Lab Equipment under \$5,000	\$0	\$0	\$0	\$0	\$0			
85	Rental/Equipment Use Fees	\$0	\$0	\$0	\$0	\$0			
86	Other	\$0	\$0	\$0	\$0	\$0			
87									
88	<b>Total Other Direct Costs - Included in MTDC</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>			
89									
90	<b>Other Direct Costs - Not included in MTDC</b>								
91	Sub-Recipient(s)	(See attached)							
92		0	\$0	\$0	\$0	\$0		\$0	
93		0	\$0	\$0	\$0	\$0		\$0	
94		0	\$0	\$0	\$0	\$0		\$0	
95		0	\$0	\$0	\$0	\$0		\$0	
96	University of Arizona		\$10,000	\$10,000	\$10,000	\$10,000		\$30,000	
97	Tuition Remission		\$0	\$0	\$0	\$0		\$0	
98	Participant Support Costs		\$0	\$0	\$0	\$0		\$0	
99	Student Stipends		\$0	\$0	\$0	\$0		\$0	
100									
101	<b>Total Other Direct Costs - Not Included in MTDC</b>		<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>		<b>\$10,000</b>	
102									
103	<b>Modified Total Direct Costs (MTDC)</b>		<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>		<b>\$0</b>	
104									
105	<b>Total Direct Costs</b>		<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>		<b>\$0</b>	
106									
107	<b>Facilities &amp; Administrative Costs (F&amp;A)</b>								
108	Rate negotiated with the DHHS	52.5% MTDC	\$5,250	\$5,250	\$2,625	\$13,125			
109									
110	<b>Total Project Costs</b>		<b>\$5,250</b>	<b>\$5,250</b>	<b>\$2,625</b>	<b>\$13,125</b>			
111									
112									
113									

No further change is necessary, as F&A, Total, etc., are filling from the Budget Worksheet cells already updated for this addition.