**Complete a Budget (Non-Grants.Gov)**



**Work Instructions:**

Follow these instructions to create a budget for a proposal that will **not** be submitted via Grants.Gov.

1. Log into Click Portal.
2. From your Inbox, on the SPO Tasks tab, open the proposal whose budget you will complete.
3. From the proposal workspace, click the **Budgets** tab and then the budget name to open it.

Note: The system automatically created this budget and named it based on the sponsor selected in the proposal.

1. Click **Grid: Inflation and Indirect Rates** on the left of the workspace to review the inflation and indirect rates. To change indirect rates:

* The default cost base type is MTDC. To see the other cost base types available, click the down arrow. Contact the Sponsored Programs Office to change the default.
* To change the indirect cost rates, click in the rate field and type a new value.
* To copy a rate to subsequent periods, click the blue arrow to the right of the value.

Click **OK** to save the changes and return to the budget workspace.

1. On the budget workspace, click the **Edit Budget** button.
2. Complete the pages, paying attention to the fields listed below. Click **Continue** in the Navigation Bar to move through the pages. Required fields are marked with an asterisk (\*).

**General Budget Information**

Most of the fields on this page are auto populated from the proposal. In general, the principal investigator, funding source, and project sponsor should not require updates here; change them in the funding proposal, if needed.

* **3.0 Budget Type:** Select **Project**, unless this budget is part of a program project.
* **4.0 Is Modular Budget?:** If this is a modular budget, select **Yes**.
* **5.0 Sponsor Budget Detail Level:** Select **Per Period, Budget Category Totals** (“Full Details” only applies to proposals submitted via Grants.Gov.)

**Budget Characteristics**

* **2.0 Will this budget Subaward/Subcontract research…:** If you select Yes, the system will add a page for you to enter the subaward/subcontract organizations. The system will also create a subaward/subcontract budget for each organization that you must complete.

Note: Steps for completing a subaward/subcontract budget are covered in other work instructions.

* **3.0 Will this budget have Cost Sharing?:** If you select Yes, the system will create a cost sharing budget for this proposal that you must complete.

Note: Steps for completing a cost sharing budget are covered in other work instructions.

**Budget Per Period Cost Totals Grid**

* **For each row:** Type the amount for each period. To copy values from the first period to subsequent periods, click the blue right arrow next to that field, otherwise, click in the field for a period and type the amount.

1. When finished answering all the required fields, on the last page, click **Finish** to return to the budget workspace.
2. At the top (under the Grants tab), click the proposal name breadcrumb to return to the proposal workspace.

Your next step is to complete any other budgets (other subaward/subcontract budgets or cost sharing budgets) for the proposal. If all budgets, along with the funding proposal, are complete, then your next step is to submit the funding proposal for department review.

