

Research Foundation for SUNY

Test Plans for SUNY PACS Grants

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| **Test Description:** | 2. Test and validate to ensure that the PI are able to create a new budget without issues. |
| **Tester Location:** |  |
| **Test Executed By:** |  |
| **Tester Email Address:** |  |

**Test 2: Create Budget**

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| Step | Test Steps | Data to Enter | Expected Results | Notes |
| 1 | Open browser and paste in https://pacsstg3.rfsuny.org/SponsoredPrograms/login |  | * The SUNY PACS website login page is presented. |  |
| 2 | Log in as **PIgrants1**  (Test accounts have been provided) |  | * Log in is successful * **Inbox** displays |  |
| 3 | Click the **Grants** tab at the top and then find the proposal you created in test plan 1 and click on the name |  | * List of proposal display |  |
| 4 | Click the **Budgets** Tab, next click the Funding Source **Name** on Working Budgets page for the Proposal you are adding a budget too. |  | * The Draft Budget page is displayed. | Note: The system automatically created a draft blank budget from the proposal |
| 5 | Click **Grid: Inflation and Indirect Rates** on the left of the workspace to review the inflation and indirect rates. To change indirect rates if necessary and/or verify the rate you want for the proposal:   * The default cost base type and rate is based upon the proposal. To see the other cost base types available, click the down-arrow. * 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. (since you have only one year you will not see this)   Click Apply and **OK** to save the changes and return to the budget workspace. | For testing purposes no changes needed, just verify the rate and base  Since one year budget you will not see this. | * Grid: Inflation and Indirect Rates are either verified or updated. |  |
| 6 | Click the **Edit Budget** Button on the left. |  | * The General Budget Information page is presented. |  |
| 7 | **General Budget Information Page:**   * Questions 1.0, 2.0 * Question 3.0 **Budget Type:** Select **Project**. (A program project cannot be sent to Grants.Gov.) * Question 4.0 **Is Modular Budget?** Select **“No”**. * Question 5 **Sponsor Budget Detail Level:** Select **Full Details** (A detailed budget is required for proposals submitted via Grants.Gov.)   Verify the information is correct. Click Save & Continue. | **These fields auto populate.**  **‘Project’**  **‘No’**  **Full Details** | * The General Budget Information is saved and the Budget Characteristics page is now displayed. | **Note:** 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. |
| 8 | **Budget Characteristics Page:**   * Question 1.0 \* **Will this budget pay for participant/trainee costs?** (Leave as no.) * Question 2.0 **Will this this Subaward/Subcontract research to another institution?** (You must enter **‘Yes’)** * **Question** 3.0 **Will this budget have Cost Sharing?** Answer No as cost sharing will be covered in another test.   **Click Save and Continue.** | ‘**No’**  **‘Yes’**  **‘No’** | The Budget Characteristics are now saved and the Personnel Costs page is now displayed. | Note: By selecting ‘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. Steps for completing subaward/subcontract budgets are covered in another test plan. |
| 9 | **Personnel Costs:**,   * **Enter the Salary Cap** as defined in the application based on the sponsor. * **Salary Inflation Rate will default, change if necessary.** * **Apply Infl. Per. 1:** If this should be applied to Period 1, check the box. | **185,000** |  |  |
| 10 | **Personnel Costs Grid:**   * **To add personnel to the grid:** In the first column, click the “add row” down arrow, select the number of personnel rows to add, and then click the **Add** button. * **For each personnel row:** Complete all the fields listed in the first column:  1. **Person:** Select the Person from the list of values by clicking the down arrow to display the list of values. 2. **Appt:** Select Appt: (Appointment Period) by clicking the down arrow to display the list of values. 3. **Role:** Select the Role by clicking the down arrow to display the list of values. 4. **Key**: Check the box if this person is a Key. 5. **F & A Type**: will default. 6. **Apply Inflation Rate**: Check the box to Apply Inflation Rate if applicable. 7. **Base Salary ( if inflation applied):** Enter the Base Salary 8. **Fringe Category**: Chose the Fringe Category from the list of values by clicking the down arrow to display the list of values.   **In the Period Column Enter:**   1. **Effort:** Enter the Percentage of Effort 2. **SalReq:** Salary Requested percentage. 3. **Base:** enter the Base salary 4. **Req**: Enter the salary amount requested. 5. **FB Rate:** The fringe benefit rate will default. 6. Click Save. | Chose the PI you are logged in as.  9 month  PI  This will default  This will default  Base Salary PI: 100,000  SUNY-IFR  20%  20%  102,000  20,400 | The Personnel Costs Grid information has now been saved. Go to Step 11 to **Add** additional people (for this test) or Click **Continue** and the General Costs Grid will be displayed and go to Step 12. | Note: The system auto populates each period’s FB rate based on the fringe category selected (based upon only entering one year you will only have one column) |
| 11 | **Add** an additional row for CO-PD/PI and TBD to the budget repeating step 10 for each person. Click Save and Continue. | CO-PD/PI  Effort: 10%  Base: 102,00  SalReq: 10,200  TBD  Effort: 100% SalReq: 100%  Base: 20,000  Req: 20,000 | * The Personnel Costs Grid information has now been saved and the General Costs Information will be displayed. |  |
| 12 | **General Costs**  **Inf Rate:** Lists the default inflation rate.  **Apply Infl. Per. 1**: Check if applying inflation rate to period 1, for the purpose of this test, leave the box unchecked.  **General Costs Grid:**   * **To add a cost item to the grid:** In the first column, click the “add row” down arrow, select the number of rows to add, and then click the **Add** button. * **For each row:** Complete all the fields listed in the first column, for example, select the cost type, type a description, type the unit cost, etc. | Cost Type: Materials & Supplies  Desc: Lab Supplies  Unit Cost: 1.00 and number of units 10,000  Cost Type: Travel- Domestic  Desc: Travel in US.  Unit Cost: 1.00  # Units: 2500 | Click Continue and the Subaward-Subcontractor Sites page will now display. |  |
| 13 | Subaward-Subcontractor Sites –  Question 1   * Click Add , Add Subcontractor form displays * Name: Leave Blank for this test * Organization: Type Cornell on the Organization line, Click Select, List of values displays, Chose Cornel University, Click Ok * Question 2, leave blank. * Click continue | Cornell University | * Note you have added the name of the subaward/subcontractor. |  |
| 14 | SF424 Subaward Import   * Question 1, Ignore * Question 2, Select Browse and select the document called ‘RR\_Budget\_1\_3\_A30-V1 3’. * Click continue | Attachment: RR\_Budget\_1\_3\_A30-V13. | * Subaward pdf form is attached and imported. | Note: For testing, we are providing the budget attachment. |
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| 15 | On the Attachments for Internal Purposes screen (optional) Click Save and Finish. | Don’t load any attachments. | * You will be returned to the Financials Screen. |  |
| 16 | Click the **Subaward/Subcontract Tab**, Click the Subaward/Subcontract **Name,** click **Edit Budget** |  | * The Subaward/Subcontract Budget Information will now display. |  |
| 17 | * Questions 1.0 Defaults in information. * Question 2, Defaults in information. * Question 3.0 Budget Type, Select "Subaward”. * Question 4,Leave PI default. * Question 5.0 leave as 0. * Question 6, select “PDF Import”, * Click **Continue.** | Subaward  PDF Import | * The Subaward/Subcontract Information is now saved. | Note: Select **PDF Import** for all Grants.Gov submissions. |
| 18 | Attachments for internal Purposes | Leave Blank and click continue | * Optional for additional attachments |  |
| 19 | You will be returned a financial screen showing the direct cost total for the subaward you imported for year 1 only |  | * Shows the total imported |  |
|  | End of Test |  |  |  |