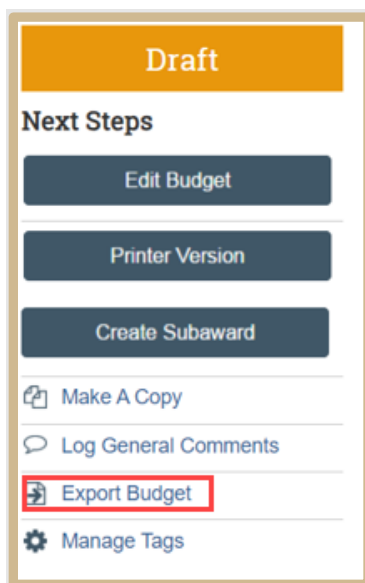


# Create a Pre-Award Budget Template

For a detailed view of the budget, a Budget Template has been created for Pre-Award to prepare and share. This Template can be used for multiple budgets in the same file.

## Export the Budget from PERA Create Budget Template

After a draft budget is created, the Pre-Award Specialist will export the budget information to excel and send it to the PI via email for review and adjustments. This excel file can be edited as needed until a budget is finalized.



1. From the Individual budget Workspace Select **Export Budget** from the Activity List.

*As this action is being prepared, a new screen will appear. After the budget export is prepared, this screen will disappear.*

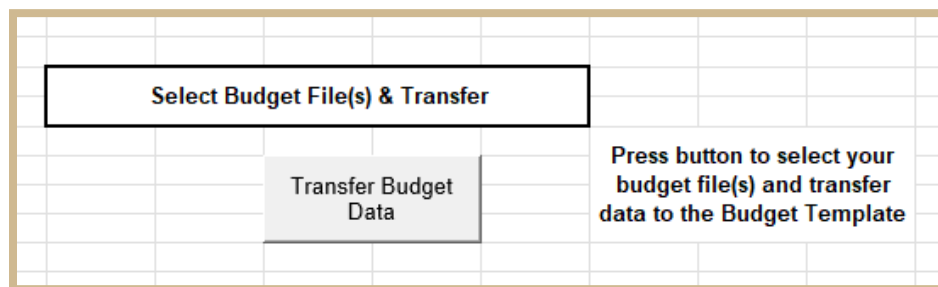


2. Click **History**, followed by **Exported Budget Spreadsheet**.

*This excel file will Download. Proceed to downloads on the computer to open the document and save to the proposal folder on the Network.*

## Create a Budget Template

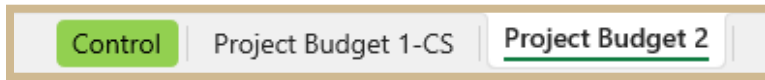
1. Open the excel file "Pre-Award Budget Template 9.2024.xlsm"



2. Select "Transfer Budget Data" to import PERA budget file(s) to this Template.

NOTE: Multiple excel files may be imported.

Each budget that is imported will create an individual tab in the Control File.



3. Make any necessary adjustments to the budget in this file.
  - a. Indicate line items that are to be excluded from the F&A base with a 'Y' in column C.

Other Direct Costs		
Cost Type	Description	Exclude From MTDC Base
Equipment	Scientific Equipment	Y
Grad Fee Remit		Y
Materials and Supplies		
Travel: Domestic		

- b. Add Subaward names and Direct/Indirect Cost Information.

<b>Subaward 1</b>	
<b>Subaward 2</b>	
<b>Subaward 3</b>	
<b>Subaward 4</b>	
<b>Subaward 5</b>	

- c. Select Yes / No for "Is this an NIH Project."

<b>Is this an NIH Project?</b>
No

- d. Choose the correct F&A Base in Column A.

MTDC Base	▼
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- e. Select the correct IP Fee option in Column A if applicable.

IP Fee	▼
Basic Research Total	▼

f. Update the F&A rate as needed.

Rate
57.000%

g. Update the IP Fee rate if applicable.

IP Fee		25%
Exclusive License Total		

NOTE: All adjustments should be made to each budget prior to Exporting for a Cumulative Budget.

Export Finished Budget	
Export Budget	Press button after making adjustments to budget(s) to export a final version

4. On the "Control" tab of the Budget Template, select "Export Budget".
  - a. If you have multiple budgets. Select if you would like to create Cumulative Worksheet?

*\*The exported file will be the final version. Further adjustments will need to be done in this Template file and re-exported.*

A new excel file will open with the same tabs as the Control File and a Cumulative Budget Tab.

Project Budget 1-CS	Project Budget 2	<u>Cumulative Budget</u>
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5. Save the Control Budget Template file for future use.

6. This Budget Template can be sent to the PI for further adjustments until finalized. The Cumulative tab on the Exported Budget file will not calculate. Adjustments should be made to the individual budget tabs and re-exported each time.



**NOTE:** The FINAL Budget Template must be uploaded to the Funding Proposal "Add Attachments" activity prior to proposal submission. This file is mandatory for all proposals. Post Award and Finance will use this file at award time.

Purdue University Simms Training Proposal Rebecca Simms (pi) Office Of Naval Research			4/1/2025-3/31/2026 Period 1		4/1/2026-3/31/2027 Period 2		Total	
Role	Name	Appointment Type	Sponsor	Cost Share	Sponsor	Cost Share	Sponsor	Cost Share
PD/PI	Rebecca Simms (pi)	Academic Year	30,333	-	31,547	-	61,880	-
PD/PI	Rebecca Simms (pi)	Summer	-	-	-	-	-	-
Co-Investigator	Joe Bloggs (pi4)	Fiscal Year	12,497	60,303	75,712	-	88,209	60,303
<b>Total Salaries</b>			<b>42,830</b>	<b>60,303</b>	<b>107,259</b>	<b>-</b>	<b>150,089</b>	<b>60,303</b>
<b>Fringes</b>								
PD/PI	Rebecca Simms (pi)	Academic Year	5,898	-	6,134	-	12,032	-
PD/PI	Rebecca Simms (pi)	Summer	-	-	-	-	-	-
Co-Investigator	Joe Bloggs (pi4)	Fiscal Year	1,025	4,945	6,208	-	7,233	4,945
<b>Total Fringes</b>			<b>6,923</b>	<b>4,945</b>	<b>12,342</b>	<b>-</b>	<b>19,265</b>	<b>4,945</b>
<b>Total Salary &amp; Wages</b>			<b>49,753</b>	<b>65,248</b>	<b>119,601</b>	<b>-</b>	<b>169,354</b>	<b>65,248</b>
<b>Other Direct Costs</b>								
<b>Cost Type</b>	<b>Description</b>	<b>Exclude From MTDC Base</b>						
Equipment	New Equipment	Y		15,000		15,000		30,000
Materials and Supplies	Materials			25,000		25,000		50,000
Equipment	Scientific Equipment	Y	20,000		-		20,000	
Grad Fee Remit		Y	11,180		11,180		22,360	
Materials and Supplies			8,000		8,000		16,000	
Travel: Domestic			4,500		4,500		9,000	
<b>Subawards</b>			<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Subawards Direct Costs</b>			<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Subawards Indirect Costs</b>			<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Subaward Costs (including Indirects)</b>			<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Other Direct Costs</b>			<b>43,680</b>	<b>40,000</b>	<b>23,680</b>	<b>40,000</b>	<b>67,360</b>	<b>80,000</b>
<b>Total Direct Costs</b>			<b>93,433</b>	<b>105,248</b>	<b>143,281</b>	<b>40,000</b>	<b>236,714</b>	<b>145,248</b>
Purdue Indirects			35,484	51,441	75,298	14,250	110,782	65,691
<b>Sub Indirects</b>			<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Costs</b>			<b>128,917</b>	<b>156,689</b>	<b>218,579</b>	<b>54,250</b>	<b>347,496</b>	<b>210,939</b>
<b>IP Fee</b>			<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Basic Research Total</b>			<b>128,917</b>	<b>156,689</b>	<b>218,579</b>	<b>54,250</b>	<b>347,496</b>	<b>210,939</b>
<b>MTDC Base</b>			<b>62,253</b>	<b>90,248</b>	<b>132,101</b>	<b>25,000</b>	<b>194,354</b>	<b>115,248</b>