Step 1: Navigate to the Budget
A budget is automatically created for each proposal. Navigate to the budget on the Budget tab of the funding proposal. Click Edit Budget to open the SmartForm.

Step 2: Enter General Budget Information
Complete the General Budget Information page. Select the F&A base and rate and determine how inflation will be applied. For budgets that will be submitted to the sponsor, confirm Include in Consolidated Budgets is Yes.

Step 3: Budget Personnel Costs
Add all Princeton personnel that will be included in the budget on the Personnel Cost Definition SmartForm page. Select their role, appointment type, and salary. Appointments are typically 9 months for faculty and 12 months for non-faculty.

On the Personnel Costs page, enter the effort and salary requested percentage for each person being budgeted to calculate the requested salary. Ensure the proper fringe benefit rate is entered to calculate benefits. A blended fringe rate must be used if the first period spans the current and next fiscal year. The FB rate should be set to 0 for personnel that do not receive benefits.

For assistance with calculations, use the Effort Distribution Tool and Blended Fringe Benefit Tool available on the Princeton ERA website.

Step 4: Budget General Costs
Add general cost types on the General Cost Definition page and set the first period amount. Select if inflation should be applied. If it is not applied, the amount per period will be editable so you can remove out year amounts not budgeted. On the General Cost page, review the costs table. Update the amount per period if needed.

Step 5: Upload Budget Attachments
Upload the Budget Justification, including any ancillary documents required by the sponsor such as the F&A rate agreement or vendor quotes. If this is an S2S submission the budget justification may be uploaded directly to the SF424 instead.

Step 6: Review Budget and Add Additional Budgets
Review a summary of your budget on the Financials tab of the budget workspace. If needed, add any additional project budgets, cost share budgets, or subaward budgets from the budget workspace or funding proposal workspace.

Need help? Email erasupport@princeton.edu

Last Updated 8/27/2020