Agenda

- Purpose of the Budget Worksheet
- Overview of the Budget Worksheet
  - Role Authority
  - Where to Access a Budget Worksheet
  - SF-424A and Budget Worksheet Mapping
- Budget Worksheet Sections and Tools
- Budget Worksheet: New Award vs Amendment
- Edit Tips: Amendment Budget Worksheet
- Q&A
- Follow-Up Materials
- Resources
- Help Desk

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Purpose of the Budget Worksheet

What is the Budget Worksheet?

A tool used for managing application and amendment budgets.

The amounts on the Budget Worksheet display on the Notice of Award (NOA).

When is the Budget Worksheet used?

Anytime money is involved, whether the action involves new money or is a post-award change.

# Overview of the Budget Worksheet

Role Authority

- Common Grants Management Services User Roles that view and edit the Budget Worksheet include:
  - Grants Management Specialist (GMS)
  - Grants Management Officer (GMO)
  - Program Officer (PO)

  Note: *Additional user roles can also be configured to allow Budget Worksheet edit rights.*

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Where To Access A Budget Worksheet

- Application Receipt and Logging screen

- Manage Amendments screen

- Grant History screen

- Funding Memo screen

- Award Overview screen

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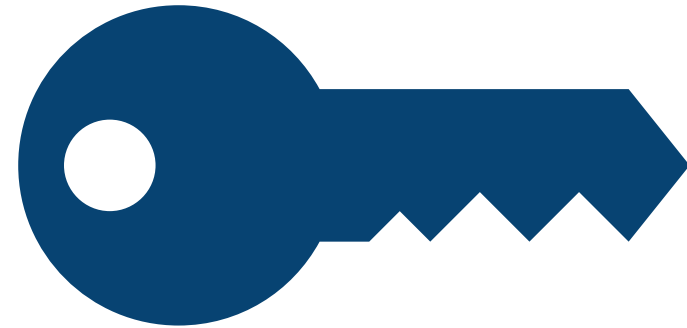
Where To Access A Budget Worksheet

Links to access a Budget Worksheet are available on several screens in Grants Management Services to easily access and edit a Budget Worksheet associated with each individual Application.

- **Application Receipt and Logging Screen**

  o The Budget Worksheet for new applications can be accessed from the "Application Receipt and Logging" screen. Click the *money bag* icon to open the Budget Worksheet for editing.

Where To Access A Budget Worksheet

- **Manage Amendments Screen**
  - A *Budget Worksheet* link is located on the "Manage Amendments" screen in the *Action* column.
  - The application verification process must be completed by Grantor staff before the *Budget Worksheet* link will appear.

Where to Access A Budget Worksheet

- **Grant History Screen**
  - For each application and amendment, *Budget Worksheet* links are located on the "Grant History" screen in the *Action* column.
  - All Grants Management Services role users can access/view the "Grant History" screen.

Application Number	Grant Number	Action Date	Project Period	Budget Period	Award Amount	Application Type	Status	Action
P		09/14/2020	04/01/2019 to 03/31/2022	04/01/2020 to 03/31/2021	$160,000.00	Post Award Amendment (Administrative/Supplement Increase)	Awarded	View Application, Budget Worksheet, View Memo, View NGA, Award Summary, Award Workflow History, View Terms & Conditions
GS		03/18/2020	04/01/2019 to 03/31/2022	04/01/2020 to 03/31/2021	$1,373,000.00	Non-Competing Continuation	Amended	View Application, Budget Worksheet, View Memo, View NGA, Award Summary, Award Workflow History, View Terms & Conditions
GS		09/28/2019	04/01/2019 to 03/31/2022	04/01/2019 to 03/31/2020	$273,000.00	Directed Supplement	Awarded	View Application, Budget Worksheet, View Memo, View NGA, Award Summary, Award Workflow History, View Terms & Conditions
G		03/26/2019	04/01/2019 to 03/31/2022	04/01/2019 to 03/31/2020	$1,100,000.00	New	Amended	View Application, Budget Worksheet, View Memo, View NGA, Award Summary, Award Workflow History, View Terms & Conditions

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Where to Access A Budget Worksheet

- **Funding Memo Screen**
  - When a Funding Memo is created for an application, the *Budget Worksheet* link will appear on the "Funding Memo" screen.

Where to Access A Budget Worksheet

- **Award Overview Screen**
  - o The "Award Overview" screen captures award data after the award is drafted and allows users to take additional actions. A *Budget Worksheet* link appears in the *Award Preparation* column.

SF-424A & Budget Worksheet Mapping

Where do the amounts on Budget Worksheet populate from?

- When new and amendment applications are submitted electronically from Grants.gov or from the GrantSolutions Grants Management Services (Grantor or Recipient submissions), the Activity name and amounts entered (not uploaded) on the SF-424A are automatically transferred into the Budget Worksheet.
    - o The system transfer saves time with data entry and helps to reduce the likelihood of errors associated with manually entering data into the Budget Worksheet.

- Each activity entered in Section A of the SF-424A becomes a Budget Worksheet Tab. Therefore, if more than one activity row on the SF-424A contains data, you will see multiple tabs on a Budget Worksheet.

- The amounts entered in Section B of the SF-424A will transfer to the *Direct Cost* section of the Budget Worksheet and these values will display as "read-only" in the *Requested* column in the corresponding SF-424A budget category row.

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How SF-424A Information Transfers to the Budget Worksheet

- Sections A and B impact the name and number of Budget Worksheet activity tabs

How SF-424A Information Transfers to the Budget Worksheet

- Values manually entered in the SF-424A are transferred to the following fields on the Budget Worksheet:

NL - Grant Languages Program

Direct Cost (NL - Grant Languages Program)

Category	Requested / Agency Adjusted Requested	Adjustment	Recommended	Total	Non-Federal	Federal	Unobligated Balance
Personnel	500,000.00	0.00	500000.00	500,000.00	0.00	500,000.00	0.00
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	500,000.00	0.00	500000.00	500,000.00	0.00	500,000.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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How SF-424A Information Transfers to the Budget Worksheet

- Values manually entered in the SF-424A are transferred to the following fields on the Budget Worksheet:

How SF-424A Information Transfers to the Budget Worksheet

- Values manually entered in the SF-424A are transferred to the following fields on the Budget Worksheet:

Category	Requested / Agency Adjusted Requested	Adjustment	Recommended	Total	Non-Federal	Federal	Unobligated Balance
			Direct Cost (NL - Grant Languages Program)				
Personnel	500,000.00	0.00	500000.00	500,000.00	0.00	500,000.00	0.00
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	500,000.00	0.00	500000.00	500,000.00	0.00	500,000.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00	0.00

NL - Grant Languages Program

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Budget Worksheet Sections and Tools

Sections and Tools on the Budget Worksheet

The Budget Worksheet includes the following:

- Header Section

- Budget Worksheet Tools

- Direct Cost Section

- Indirect Cost Section

- Non Federal Cost Section

- Adjustment Options Tool

- Final Budget Totals Section

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Header Section

The Header is always positioned at the top of the screen. It contains a read-only summary of applicant/grantee, project information and funding pertaining to the current action.

Budget Worksheet Tools

1. Calculate Budget as
2. Scenario
3. Activity
4. Print

Budget Worksheet Features

Calculate Budget as: Select whether the *Direct Cost* section of the Budget Worksheet should include non-federal amounts (*Total Cost* radio button), or federal amounts only (*Federal Only* radio button).

Budget Worksheet Features

Create Scenario: Generate an exact copy of the original Budget Worksheet and create other possible budget options without making real changes to the original version.

- Create, Load, Select, Rename, Delete, and Reset a scenario.
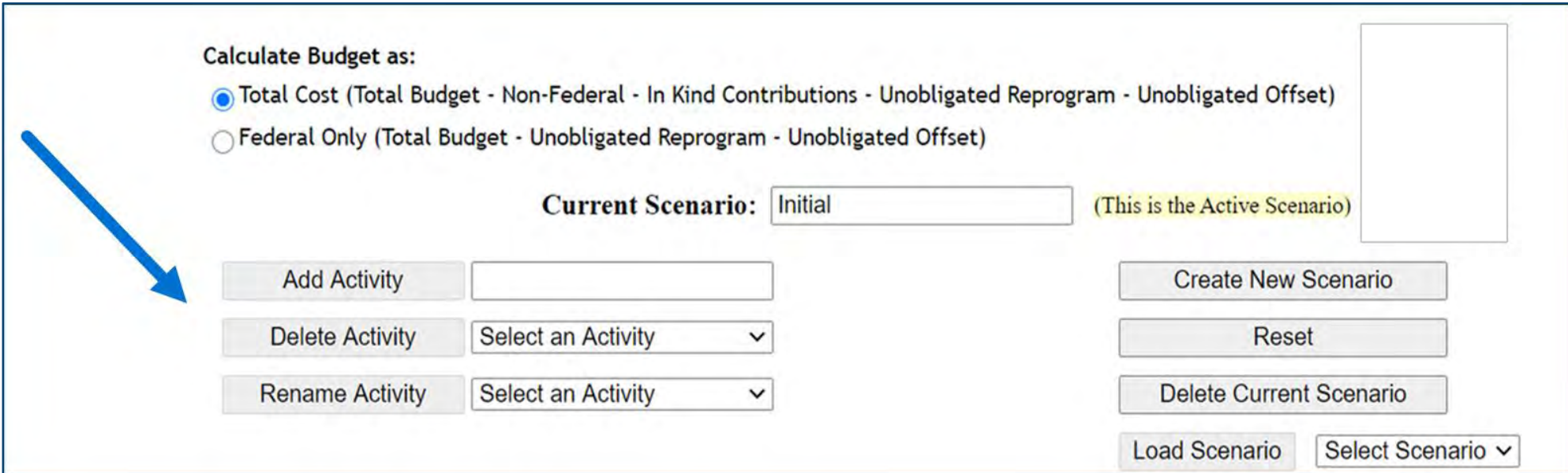
Budget Worksheet Features

Activity Tabs: Each Activity entered on the SF-424A transfers to the Budget Worksheet as a new tab. However, the *Activity* section allows you to:
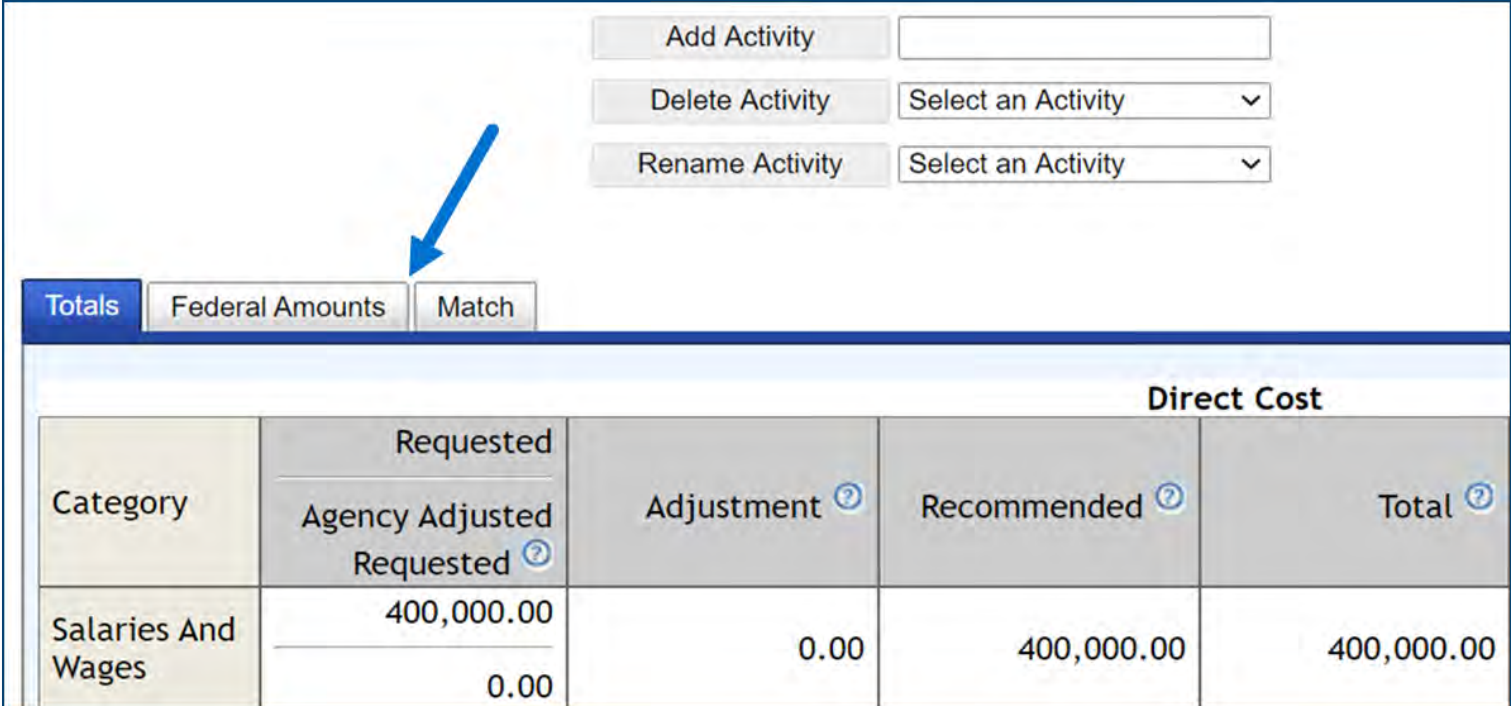
- Add a new Activity tab
- Delete an Activity tab you've manually added
- Rename an existing Activity tab

Direct Cost Section

- Contains the requested and recommended budget for an award. Budget amounts are entered or edited in other Activity tabs. When the amounts in a tab are edited, the Totals tab updates to reflect the new budget.

- Amounts entered on SF-424A are transferred to one or more activity tabs.

- When there is more than one Activity tab, a read-only *Totals* tab is created.

- The *Totals* tab displays the cumulative "Recommended" total amount from all Activity tabs.

Direct Cost Section

- The *Requested* column reflects the amounts entered on the SF-424A transferred electronically to this field.

- The *Agency Adjusted Requested* field is used when there is an error in the amount entered by the applicant on the SF-424A. The *Agency Adjusted Requested* field is used at the discretion of the Grantor.

Direct Cost Section

- For Amendment actions, there is a *Previous Budget* column.

- The *Adjustment* column can be used to add or take away funds in the *Recommended* column.

- The *Recommended* column contains the amounts the Grantor would like to award for each budget category. Although the requested amount displays by default, the Grantor can modify the amount for each category.

Category	Previous Budget	Direct Cost Requested / Agency Adjusted Requested	Adjustment	Recommended	Total	Non-Federal	Federal
Salaries And Wages	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Construction	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other	187,500.00	0.00	0.00	0.00	187,500.00	0.00	187,500.00
Trainee		0.00					

Direct Cost Section

- Check the *Non-Federal* column in each Activity tab. When a value is entered in this column, the amount in the *Federal* column will decrease by the amount entered in the *Non-Federal* column.

Indirect Cost Sections

- The *Indirect Cost* section is optional and contains the indirect costs for each Activity tab. The total of the amounts entered in the *Indirect Cost* section display in the *Indirect* row of the *Direct Cost* section.

- The *Base, Rate Percent,* and *Month* columns can be modified if the selected *Method* is anything but *Manual*. *Manual* is the default. Other available methods include:
  - S&W for Salaries and Wages
  - TADC for Total Adjusted Direct Cost
  - MTDC for Modified Total Direct Costs

Non-Federal Section

- When an applicant enters non-federal amounts in the *Non-Federal* section of the SF-424A, those amounts transfer to the *Non-Federal* section of the Budget Worksheet. The Grantor also has the option to manually enter values in the *Non-Federal* section if they want to track or record the Recipient contribution.

- The non-federal amounts must be entered into the *Applicant*, *State*, *Other*, and *Program Income* columns when non-federal funds are entered into the *Non-Federal* section. The Grantor can decide whether to include program income in the *Total Non-Federal* amount by using the radio buttons.

Note: The Non Federal Section is used to capture Matching Funds.

Adjustment Options Tool

- This tool is located near the bottom of the Budget Worksheet *Totals* tab.

- Use this tool to increase or decrease the entire budget by a certain percentage for all direct and/or indirect costs for federal, non-federal, or total costs.

- Once the adjustment is run, either save the changes or undo the calculation.

Final Budget Totals

- This section is located just below the *Adjustment Options* tool on the *Totals* tab.

- It displays the total awarded budget, federal, and any non-federal budget. It also displays *Unobligated Funds*, *In Kind Contribution*, *Program Income*, and *Total This Action* fields.

Final Budget Totals	
Total Budget ⓘ	700,000.00
Non-Federal (May Include Program Income) ⓘ	200000.00
Federal ⓘ	500,000.00
Unobligated Funds - Reprogram	0.00
Unobligated Funds Offset	0.00
In Kind Contribution ⓘ	0.00
Program Income ⓘ	0.00
Total This Action ⓘ	500,000.00

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Budget Worksheet: New Award vs Amendment

New Award Budget Worksheet

- *Direct Cost* section displays eight column headers.

Amendment Budget Worksheet

- The Budget Worksheet for an amendment will include the *Previous Budget* column and will display the last approved budget.

Category	Previous Budget ⓘ	Direct Cost Requested / Agency Adjusted Requested ⓘ	Adjustment ⓘ	Recommended ⓘ	Total ⓘ	Non-Federal ⓘ	Federal ⓘ	Unobligated Balance ⓘ
Salaries And Wages	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Construction	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other	187,500.00	0.00	0.00	0.00	187,500.00	0.00	187,500.00	0.00

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Entering Carryover Value

- The recommended carryover amount must be entered in the *Recommended* and *Unobligated Balance* columns.

Entering Deobligation Value

- When deobligating funds, enter the negative value in the *Recommended* field for the specific budget category.

- Review the *Total This Action* field on the *Totals* tab (displays the deobligation award amount).

Resources

- **Grants Management Services Process New Application Guides**: Funding Memo Creation, Budget Worksheet, and Funding Memo Recommendation

- **Grants Management Services Amendment Guides**: Funding Memo Creation, Budget Worksheet, and Funding Memo Recommendation

- **Grants Management Services Closeout Guides**

*Remember you must be logged into GrantSolutions before you click on the link to access the Federal Support and Training Resources Site

Resources

- Advanced Budget Worksheet - Amendments Presentation

- Quick Sheet: Using the Budget Worksheet – Budget Revision Amendment for the Grant Office

- Quick Sheet: Using the Budget Worksheet – Budget Revision Amendment for the Program Office

- Quick Sheet: Using the Budget Worksheet - Carryover (Reprogram) Amendment for the Grant Office

- Quick Sheet: Using the Budget Worksheet - Carryover (Reprogram) Amendment for the Program Office

- Quick Sheet: Using the Budget Worksheet – Supplement with Offset Amendment for the Grant Office

- Quick Sheet: Using the Budget Worksheet – Supplement with Offset Amendment for the Program Office

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Help Desk

- The GrantSolutions Help Desk is available to provide technical assistance
  - Monday – Friday 7 AM to 8 PM Eastern Time
    - Excluding Federal Holidays
  - **Email:** help@grantsolutions.gov
  - **Phone:** 202-401-5282 or 866-577-0771

Follow-Up Materials

- Recording will be sent to all participants
- Slide deck will be available after training

Questions?