



CLICK Grants Module - Budget Frequent Errors

Funding Proposal SmartForms Budget Periods

Common Error: Entering high level budget information in the wrong area.

Solution: Do NOT enter data in the Target DC and IDC areas in the Budget Periods page. This “Target” data is not used to document the budget totals; these fields feed another section of the system that is not currently utilized. The Target DC and Target IDC amounts should remain \$0. This page is used to determine the budget TIME PERIODS ONLY and calculates the end date based on the budget periods indicated.

Use Advanced Editing

*Date Project Starts

Date Project Ends

Project Length (Years)

Add	row:	Add	Duration (Months)	Target Direct \$	Target Indirect \$	Start	End	
1	Period Number	1 *	12	\$ 0.00	\$ 0.00	11/1/2018	10/31/2019	
	Period Name							
	Period 1							
2	Period Number	2 *	12	\$ 0.00	\$ 0.00	11/1/2019	10/31/2020	
	Period Name							
	Period 2							
3	Period Number	3 *	12	\$ 0.00	\$ 0.00	11/1/2020	10/31/2021	Remove
	Period Name							
	Period 3							

Budget SmartForms

General Budget Information Question 5.0 Sponsor Budget Detail Level

Common Error: People are choosing the **Full Details** budget choice

Solution: Choose **Per Period, Budget Category Totals**

General Budget Information

1.0 * Budget Title:

2.0 * Principal Investigator for this Budget:

3.0 * Budget Type:

4.0 * Funding Source:

* Project Sponsor:

* Is Modular Budget?: Yes No [Clear](#)

5.0 * Sponsor Budget Detail Level:

Full Details

Per Period, Budget Category Totals

Back



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Entering the Budget

The correct place to enter the per year high level budget amounts (total DC and total IDC) is in the Budget tab (follow steps below)

Step 1: Click on the Budgets tab

The screenshot shows a 'Draft' status bar at the top left. To its right, under 'Project Information', the 'Budgets' tab is highlighted with a red box. Below this, there are buttons for 'Edit Funding Proposal' and 'Printer Version'. On the right side, there is a 'PROPOSAL INFORMATION' section with fields for 'PD/PI:' and 'Department/Institute/Center:'.

Step 2: Click on the budget name (defaults to sponsor name)

The screenshot shows a table titled 'Working Budgets'. The table has two columns: 'Name' and 'SmartForm'. The 'Name' column contains 'Sponsor Name' with a document icon to its left, and this text is highlighted with a red box. The 'SmartForm' column contains '[Edit]' with a dropdown arrow.

Step 3: Click on Edit Budget button

The screenshot shows a 'Current State' section with a 'Draft' status bar. Below it, the 'Edit Budget' button is highlighted with a red box. Other buttons visible are 'Printer Version', 'View Differences', and 'View SmartForm Progress'.

Step 4: fill out the budget page smart forms, making sure you choose "Per Period, Budget Category totals" in Question 5 of page 1.

The screenshot shows a dropdown menu with the text '5.0 * Sponsor Budget Detail Level:'. The selected option, 'Per Period, Budget Category Totals', is highlighted with a red box.

Step 5: when you reach the per period Grid, for each budget period, enter in the Total Direct costs in the Other line and the Total Indirect costs in the Indirect Line. Enter any comments/notes as appropriate.

Human Subject Costs:	\$0.00	\$0.00	\$0.00	\$0.00
Animal Purchase/Care Costs:	\$0.00	\$0.00	\$0.00	\$0.00
Alterations and Renovations:	\$0.00	\$0.00	\$0.00	\$0.00
ADP/Computer Services:	\$0.00	\$0.00	\$0.00	\$0.00
Other:	\$100,000.00	\$100,000.00	\$50,000.00	\$250,000.00
Subcontract:	\$0	\$0	\$0	\$0
Indirect:	\$50,000.00	\$50,000.00	\$25,000.00	\$125,000.00
Grand Total:	\$150,000	\$150,000	\$75,000	\$375,000
Budget Notes:	Sponsor limits IDC to 50%			