How to Edit Subcontractor Budgets for the Report of Expenditures and Renewal Budget & Progress Reports

Subcontractor budget(s) associated to an award record are initially entered in at the application phase of the award. When the application is approved to fund, the subcontractor budget(s) will be available to view/edit once the award has been issued. The subcontractor budget(s) will be available to view/edit when completing the Renewal Budget & Progress Report and the Report of Expenditures. For applications/awards that include a subcontract with a third party, the applicant/awardee may request indirect costs on the first $25,000 of each subcontract per project period. Negotiations of subcontracts are between the applicant institution and the subcontractor.

Renewal Budget & Progress Reports - Subcontractor Budgets

(Please refer to the guide "How to Complete the Renewal Budget & Progress Report" for further guidance on the submission of the Renewal Budget & Progress Report)

1. You may find all pending deliverables including your Renewal Budget & Progress Report by clicking on **Upcoming Deliverables** under **My Activities**. **PLEASE NOTE**: You will only be able to view deliverables associated to an Award if the **Principal Investigator** has added you as a contact to their award (For more information, refer to "How to Add Contacts" guide)

2. The **Upcoming Deliverables** page lists all outstanding deliverables for a given award. To begin, select the **Renewal Budget & Progress Report** in **Pending** status.

3. On the Renewal Budget & Progress Report page, select **Begin Preparation**. This will update the status of the Renewal Budget & Progress Report to *In Progress*.

4. When the **Renewal Budget & Progress Report** is in *In Progress* status, you will be able to view/edit the Subcontractor Budget(s) associated with the award record. To view/edit a Subcontractor Budget, select **Enter Budget** next to the Subcontractor Budget line-item.
   PLEASE NOTE: Only the **Principal Investigator**, **Financial Officer,** or **Grants Officer** can edit the Subcontractor Budget. If you are a contact that needs to enter in the budget, you must request **Budget Access** from the **Principal Investigator** (Refer to the guide "How to Grant Budget Access").

5. In the Subcontractor Budget pop-up window, select the **Award Period Year** that the **Renewal Budget & Progress Report** is reporting on (the Budget Period Year). Enter in all the budget details of the Subcontractor Budget including the Indirect Costs (if applicable). Select **Save** then **Close Budget** to close the Subcontractor Budget pop-up window. Select **Save My Work** on the **Renewal Budget & Progress Report** page to save the budgetary information entered in the Subcontractor Budget details.
   PLEASE NOTE: The Subcontractor Budget pop-up window WILL NOT allow you to edit any budget details for the previous or future award period year(s) of the award. The Subcontractor Budget pop-up window will only allow you to edit the Subcontractor Budget details of the award period that correlates to the Renewal Budget & Progress Repot budget period.

6. Once the Subcontractor Budget(s) have been entered in, select the check box next to "*I confirm that subcontractor actuals for this reporting period have been entered.*" to acknowledge that the Subcontractor Budget(s) related to the **Renewal Budget & Progress Report** budget period have been reviewed.

7. To view the Total Summary of the Subcontract Budget(s), select **Open** next to the **Budget** field to open the **Renewal Budget & Progress Report** renewal budget detail. Under the **Subcontractor Summary** expense category, you will find your updated Subcontractor Budget(s) **Total Subcontractor Budget** amount(s) and the **Modified Total Direct Cost** of the Subcontractor Budget(s).   The Subcontractor Budget(s) for the **Renewal Budget & Progress Report** are now ready to submit as part of the renewal budget.

Report of Expenditures - Subcontractor Budgets

(Please refer to the guide "How to Enter in Financial Reports" and "How to Enter in the Report of Expenditures" for further guidance on the submission of the Report of Expenditures)
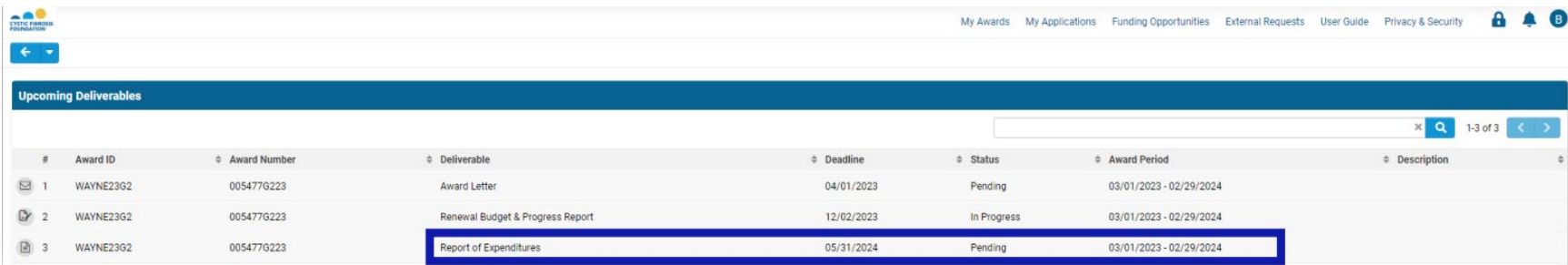
1. You may find all pending deliverables including your **Report of Expenditures** by clicking on **Upcoming Deliverables** under **My Activities**. **PLEASE NOTE**: You will only be able to view deliverables associated to an Award if the **Principal Investigator** has added you as a contact to their award (For more information, refer to "How to Add Contacts" guide)

2. The **Upcoming Deliverables** page lists all outstanding deliverables for a given award. To begin, select the **Report of Expenditures** in **Pending** status.

3. On the Report of Expenditures page, select **Begin Preparation**. This will update the status of the Report of Expenditures to *In Progress*.

4. When the **Report of Expenditures** is in *In Progress* status, you will be able to view/edit the Subcontractor Budget(s) associated with the award record. To view/edit a Subcontractor Budget, select Enter Budget next to the Subcontractor Budget line-item.
   PLEASE NOTE: Only the **Principal Investigator**, **Financial Officer**, or **Grants Officer** can edit the Subcontractor Budget. If you are a contact that needs to enter in the budget, you must request Budget Access from the **Principal Investigator** (Refer to the guide "How to Grant Budget Access").

5. In the Subcontractor Budget pop-up window, select the **Award Period Year** that the **Report of Expenditures** is reporting on (the Budget Period Year). Enter in all the budget details of the Subcontractor Budget including the Indirect Costs (if applicable). Select **Save** then **Close Budget** to close the Subcontractor Budget pop-up window. Select **Save My Work** on the **Report of Expenditures** page to save the budgetary information entered in the Subcontractor Budget details.
   <u>PLEASE NOTE:</u> The Subcontractor Budget pop-up window WILL NOT allow you to edit any budget details for the previous or future award period year(s) of the award. The Subcontractor Budget pop-up window will only allow you to edit the Subcontractor Budget details of the award period that correlates to the Report of Expenditures budget period.

6. Once the Subcontractor Budget(s) have been entered in, select the **check box** next to "*I confirm that subcontractor actuals for this reporting period have been entered*." to acknowledge that the Subcontractor Budget(s) related to the **Report of Expenditures** budget period have been reviewed.

7. To view the Total Summary of the Subcontract Budget(s), select **Enter ROE** next to the **Report of Expenditures** field to open the **Report of Expenditures**. Under the **Subcontractor Summary** expense category, you will find your updated Subcontractor Budget(s) **Total Subcontractor Budget** amount(s) and the **Modified Total Direct Cost** of the Subcontractor Budget(s). The Subcontractor Budget(s) for the **Report of Expenditures** are now ready to submit as part of the expenditure report.