IAF Data Entry - Budget tab

For the most up-to-date information, visit this article in ServiceNow.

This tab contains information associated with the proposal’s budget.

Budget information may be imported from SIMSbudgets or entered directly on the form. Information should be entered for the first (initial) period of the budget and for the total budget. In the case of a single period budget, the information will be the same.

1. **SIMSbudgets Budget #**: If you have imported a budget from SIMSbudgets, the budget # will appear. To import a budget from SIMSbudgets, enter the budget # and click the magnifying glass to find it. Once the budget is validated, the magnifying glass will become a check box. To re-import the budget (e.g. after a change to the budget in SIMSbudgets), click the refresh budget button. You can choose to refresh all tabs (Basic Info, Budget, and Personnel) or just the Budget tab. (see "Refreshing Budget")
2. **Budget Details With Salary Information**: A PDF of the detailed budget (including salary information) must be uploaded. Only the AOR(s) and the PI and their Department Head and Research Dean will have access to the detailed budget. Other investigators (and their Department Head) will not have access to this file. Required to submit IAF. File size limit is 100MB.
3. **Initial Period Start**: Beginning date of first period. MM/DD/YYYY format. Required to submit IAF.
4. **Initial Period End**: End date of first period. MM/DD/YYYY format. Required to submit IAF.
5. **Initial Direct**: Total amount of direct funds requested (not including F&A or fee) for the first period total budget. Required to submit IAF.
6. **Initial F&A**: Total amount of F&A requested for the first period total budget. Value can be 0. Required to submit IAF.
7. **Initial Fee**: Total amount of fee requested for the first period total budget. Value can be 0. Required to submit IAF.
8. **Initial Total**: Total amount for the first period total budget. Calculated total. Read-only.
9. **Total Budget Start**: Beginning date of total budget. Copied from Initial Period Start. Read-only.
10. **Total Budget End**: Ending date of total budget. MM/DD/YYYY format. Required to submit IAF.
11. **Total Direct**: Total amount of direct funds requested (not including F&A or fee) for the total budget. Required to submit IAF.
12. **Total F&A**: Total amount of F&A requested for the total budget. Value can be 0. Required to submit IAF.
13. **Total Fee**: Total amount of fee requested for the total budget. Value can be 0. Required to submit IAF.
14. **Total**: Total amount for the total budget. Calculated total. Read-only.
15. **F&A Rate**: Enter each F&A rate applied to the budget in numeric form (e.g. 53%). Allows up to 3 rates. Value can be 0. Required to submit IAF.
16. **Location**: Choose on or off campus based on the predominant location of the research as indicated by the primary F&A rate. In rare cases, mixed rate is appropriate. Required to submit IAF.
17. **Basis**: Choose the calculation basis for the budget: Modified Total Direct Cost, Total Direct Cost, Total Amount, or Other. Required to submit IAF.

18. **Current Grant, Contract, OR PSU Account Info**: 200 characters.

19. **Are Subcontracts or Subrecipients proposed**: Choose “Yes” if Penn State will issue a subaward or subcontract to another institution or company. This value is auto populated, if a SIMSbudgets budget is associated based on Subcontract object code. Required to submit IAF.

20. **Are there Participant Support Costs budgeted**: Choose “Yes” if Participant Support Costs are budgeted. This value is auto populated, if a SIMSbudgets budget is associated based on Participant Support Cost object codes. Required to submit IAF.

21. **Does this proposal include sponsor salary cap limitations?**: Choose “Yes” if you have individuals who are exceeding current sponsor salary cap. Required to submit IAF.

22. **Does this project require additional space, renovations to existing space or new equipment that is not funded in the proposed budget?**: Required to submit IAF.
   a. **Please describe the requirements here**: 200 characters. Required to submit IAF.

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**SIMBA Account Information**

Please note that all listed SIMBA data is required at Award stage. If the information is incorrect, the account creation request will be rejected and returned to the unit for correction.

1. **Grant Number**: Auto-generated on IAF insert. Read-only. Grant is an element that represents sponsored grants and contracts. It is linked to external sponsors for billing, stores all pertinent data associated with the grant or contract, and tracks the status of the award or project. It groups together sponsored programs with detailed revenue and expenditure for sponsor funds and cost share funds. Grant is a required field on all transactions, but non-grant transactions are assigned to a Not-Relevant Grant. This helps reconciliation between total expenditures and grant-related expenditures.

2. **IO Number**: (Internal Order Number) Generated by SIMBA. Read-only. Does not apply to ARL administered IAFs.

3. **WBSE Number**: (Work Breakdown Structure Element) Appears for ARL administered IAFs only. This number should already exist in SIMBA, and be entered here. Required to submit an IAF from Award stage.

4. **Cost Center**: A collector of costs and revenue for a permanent activity within an organizational unit (division, department, etc.). Unit’s should contact their Financial Officer if they are not familiar with their unit cost center.
   a. Required to submit an IAF from Award stage. Does not apply to ARL administered IAFs.
   b. Numeric. Cannot exceed 16 characters. Type the first four digits to return a pick list of valid Cost Centers. The Functional Area will also display in the populated list.
   c. **WARNING**: The Functional Area related to the Cost Center must be compatible with the Project Type entered on the Basic Info tab. If it is not, either the Cost Center or the Project Type needs to be updated. The Cost Center must also be chargeable (only valid Research, Instruction, Outreach areas display).
   d. **Help Text**: Note: There is no Project Type of Student Aid. If the student will be engaged in “activities involving the training of individuals in research techniques where such activities utilize the same facilities as other research and development activities and where such activities are not included in the instruction function,” please select a Project Type and Cost Center of Research (2 CFR 200.1). If the student will be engaged in other activities, please select a Cost Center or Project Type of Instruction or Public Service. If you wish to capture the fact that the funds are being provided in support of Student Aid, please use the Subfunction Reporting field in the IAF Account Setup tab to capture this information.

5. **Functional Area**: A Functional Area represents a mission and function classification of each revenue and expense transaction to provide information on the overall purpose. Functional area groups can be created for reporting purposes. The functional area cannot be selected. It is
5. Account Name: Defaults to the first 20 characters of the IAF Title. User can change value, but cannot exceed 20 characters. Required to submit an IAF from Award stage. Name of the overall Grant.

6. Request Advanced Account? Choose yes if the unit is requesting an advanced fund prior to award. Required to submit an IAF from Award stage. (see Creating an Internal Order Number)

IBIS Account Information

For accounts where an AURA may have been created on or prior to May 22, 2020, the AURA related information will display in the upper left instead of the SIMBA Account Information.

1. Create AURA: Choose yes if an AURA should be created for this IAF if/when awarded. Required to submit IAF, if available (see Creating an AURA Form Number).
   a. AURA Contact Email: Auto populated based on Administering Unit.
   b. Are Advanced Funds Requested: Choose yes if the unit is requesting an advanced fund prior to award. Required to submit IAF.
      i. Advanced Funds Reason: Required to submit IAF, if available. 100 characters.
   c. AURA Budget Number: Provide budget number and location. Use the full budget format (7 digits without dashes) and 2 character location (e.g. UP). Required to submit IAF, if available.
   d. AURA Budget Notes: Any text in these fields will be transferred to the AURA budget notes fields. Each line is limited to 50 characters. 200 total characters.