



**The University of Texas at El Paso
Office of Research and Sponsored Project
Handbook / Enchiridion**

Step 1.3: Budget Preparation

Purpose: To prepare a budget that meets the scope/needs of the project while also adhering to agency guidelines and all other university regulations.

Parties Involved: Research Administrator, C&G Specialist III, Principal Investigator/Researcher, Subcontractors (if applicable), Chairs and Deans

Steps in the Process:

- Gather basic budgetary information to include:
 - Title
 - Due date
 - Funding agency (mark if flowdown)
 - Link to proposal guidelines
 - Principal Investigator
 - Submit thru department
 - Period of performance
 - Subject to IRB/IACUC
 - Could lead to a patent/invention
 - Verify and select F&A rate
 - Proposal type (Research, Instruction, Other)
 - CFDA # (If the source of funds are Federal but no CFDA # is provided, insert the first two digits of the prime agency as identified on www.cfda.gov. For example, DOD is 12.000.)
- Detail budgetary needs:
 - Personnel (Faculty, Staff, Students); if co-PIs, request the percent of participation credit
 - Equipment (must be over \$5,000 per unit)
 - Travel (domestic, mileage, foreign [if agency allowed])
 - Participant Support (Tuition/Stipends/Travel)
 - Other Direct Costs as included in budget tool
 - Subcontracts
- Subcontracts
 - RA will use criteria to determine if the agency is a subcontractor or vendor using the [Subrecipient vs Contractor Checklist](#)
 - RA needs to send an email to subcontracts@utep.edu that includes the following: contact info for subrecipients, their PI name, internal deadline, title, project period, agency info, UTEP PI name/dept contact, and budget amounts (if already determined).



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Specialist will contact subcontractors and request completion of **Subrecipient Commitment Form** and submission of all related documents.

- Mandatory Subrecipient Commitment form may include:
 - Scope of work
 - Detailed Budget
 - Budget Justification
 - Institutional Letter of Commitment (if required by guidelines)
 - Letter of Support (PI to PI)
 - Key Personnel Bio-sketches
 - Other documents as required by granting agency

- Cost Share Budget (only when mandated by agency)
 - If cost share is required, must obtain letter or email from the account owner providing the commitment for the complete proposal file.
 - Must have the same indirect rate as used on the agency request.
- Insert 50 to 300 words abstract for the lay audience as provided by PI.
- Generate electronic transmittal document for review and authorization by the PI, Chair, and Dean at least 5 days before submission.

Summary Description: To summarize the estimated financial needs of the project.



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Basic information

Project title	<input type="text"/>	Proposal due date	2/11/2015	Proposal type	<input type="text"/>	ORSP Number	-
Agency	<input type="text"/>	(New agency)	Proposal Guidelines (link)	<input type="text"/>	CFDA No.	<input type="text"/>	
Flow-Down (Primary Agency)	<input type="text"/>	(New agency)	Submit thru	<input type="text"/>			
PI Name	<input type="text"/>	Participation (%)	0	No. Years	6	From	2/11/2015 To 2/10/2021 6y: 0m: 0d
Agency	UTEP	Shift+Alt+C to copy the current budget tab to the clipboard					

Personnel	Travel	Participant Support	Equipment	Consultant	Subcontract	Other Direct	Transmittal Info	Abstract
Due date	2/11/2015							
CFDA Title	<input type="text"/>							
Type of proposal:	<input type="checkbox"/> Research	<input type="checkbox"/> Instruction	<input type="checkbox"/> Other					
THECB R&D fields	<input type="text"/>	and	THECB Special interest	<input type="text"/>				
NSF S&E Fields	<input type="text"/>	or	NSF Non S&E fields	<input type="text"/>				
<input type="checkbox"/>	Do you anticipate any contractual terms, conditions, and restrictions? Types of restrictions include but are not limited to: ITAR, EAR, OFAC and certain classifications							
<input type="checkbox"/>	Are there cost-sharing commitments or long-range financial commitments? Cost-Sharing Type (NONE)							
<input type="checkbox"/>	Is this a multidisciplinary proposal?							
<input type="checkbox"/>	Does this proposal involve international collaborations, subawards, travel, student/faculty exchange?							
<input type="checkbox"/>	Does this proposal require additional space? Renovation/upgrades of current space? Do current facilities (infrastructure, equipment, power supplies, security doors/locks/storage) support project activities?							
<input type="checkbox"/>	Will a portion of the project be subcontracted? (If yes, complete subcontract proposal must be attached in accordance with OMB Circular A-133.)							
<input type="checkbox"/>	Could this research lead to a patentable invention?							
<input type="checkbox"/>	Radioactive Materials or Radiation Devices?	<input type="checkbox"/> Approval attached	<input type="checkbox"/> Approval pending					
<input type="checkbox"/>	Recombinant DNA?							
<input type="checkbox"/>	Humans as research subjects?	<input type="checkbox"/> Approval attached	<input type="checkbox"/> Approval pending					
<input type="checkbox"/>	Animals as research subjects?	<input type="checkbox"/> Approval attached	<input type="checkbox"/> Approval pending					



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Agency **UTEP**

Fringe/Indirect

	Faculty	Staff	Grad	Undergrad
Premium Monthly Rate	691.06	691.06	345.53	0.00
Benefits Rate (%)	16.98	17.98	0.83	0.83

Indirect cost rate (%) for Research proposals Override indirect cost
 for Instruction proposals
 for Other proposals

Salary increase (%)

Other

Travel rate (\$)/mile

Only the first (\$) of each subcontract will be charged indirect cost

Abstract page

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Envelope to send transmittal

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Summary Send All ORSP forms Approve Unlock Upload Download Award/Reject Account

Proposal due date 2/15/2015 Proposal type Research ORSP Number -

INFECTIOUS D (FED) (New agency) Proposal Guidelines (link) CFDA No. 93.856

Submit thru Chemistry

Participation (%) 55 No. Years 2 From 10/ 1/2015 To 9/30/2017 2y: 0m: 0d

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Participant Support	Equipment	Consultant	Subcontract	Other Direct	Transmittal Info	Abstract
Post Doc	Other Professional	Graduate Stu	Undergrad Stu	Secretarial	Other Personnel	