

SIMS Budgets/Cayuse Tips

General

- ❖ Mozilla Firefox – recommended Browser www.mozilla.org/firefox, Google Chrome
- ❖ Enable Popups
- ❖ You MUST begin in SIMS budget in order to create a Cayuse application

1. PIAF

- ❖ Always print PIAF from SIMS Budget
- ❖ In SIMS Budget, create PIAF. For any budget changes, do **NOT** create another PIAF. Go to the PIAF locator, find your PIAF, make necessary changes, reprint those pages.
- ❖ Prime Sponsor #11 is the original source of funds. The Sponsor is our source of funds (ie: incoming sub award).
- ❖ On page 1 question 4 – college/unit email address, use email address that we would contact if there are questions
- ❖ You must keep your title flowing on line 8, page 1. (Do NOT hit the return/enter button)
- ❖ If you need to delete a PIAF you can only delete it if you are the creator. You need to hit edit and then the delete button will appear.
- ❖ To make changes to the budget period, click in the gray box at the top of the budget and each period will come up to edit. If you want to add a budget period, use the “new period” icon at the top of the page. If you want to delete a budget period, click on the red circle with the minus sign.
- ❖ Anywhere that you see the **blue** magnifying glass icon, you must click to verify.
- ❖ Hershey Blue – signatures no longer required

OR

2. ePIAF

- ❖ Must **Create** ePIAF through Sims website <http://www.sims.psu.edu/>
- ❖ Provide Input
- ❖ Save your Sims budget as a .pdf and upload
- ❖ Print ePIAF from “Summary” Tab for ORA 1st Review
- ❖ Reminders:
 - Principal Investigators to use myResearch Portal for assistance <http://www.myresearch.psu.edu/>
 - Hershey Blue sheet – Not required
 - Do **NOT** place into Workflow prior to ORA review

3. Budgets

- ❖ Include **ONLY** Penn State personnel on the budget
See #6 and #7 for including subawards
- ❖ Verify Modular or Detailed (Traditional) Budget when starting in SIMS
- ❖ All Category I – Key Personnel MUST be verified.

- ❖ Senior/Key Personnel Category I object codes on the object code map. For detailed budgets, under the Sponsor Role drop down box, anyone listed as “Other Significant Personnel will route to section B – Other Personnel. If you want them in section A you must select “Key Personnel”. Do not select “None”
- ❖ If an investigator is over the NIH salary cap, enter the current salary (salary plus incentive).

4. Misc. Object Codes

- ❖ HMC faculty should use object code 104,114, etc. in place of 154,196 etc.
- ❖ Object codes 175 and 178 (Staff/Technicians) select Other Significant Personnel.
- ❖ Object Codes 176, 106 and 8003 map to secretarial/clerical – ONLY use these if the RFA allows.
- ❖ For Hershey Nurse Coordinators (charge-back purchase service object code 460). Budget as object code 411.
- ❖ Object Code 411 - Purchased Services and Awards to Employees – **remove** the wording, “AWARDS TO EMPLOYEES”
- ❖ If awarded, please BARA and charge to correct object codes
- ❖ For Cayuse:
 - Postdoctoral Scholars – use 8000
 - Graduate Lecturer/Researchers (summer) use 8004

5. Graduate Assistants – Hershey

- ❖ Graduate Assistants (10 months of the academic year – August through May)
See Graduate Lecturer/Researcher for June & July
- ❖ Category II, Object Code 164
- ❖ Grade 16 – Half Time
- ❖ Tuition: Full-time = Pre-comprehensive rate
- ❖ Tuition: 601-611 = Post-comprehensive rate
- ❖ SIMS will calculate the stipend & tuition amounts and automatically place on the budget.
- ❖ For Grade 21 appointments – Use Grade 0 as a work-around.

6. Graduate Lecturer/Researcher

- ❖ Same Graduate Assistant – (appointed 2 months, June & July)
- ❖ Category III, Object Code 124 (8004 – Cayuse)
- ❖ For each period you must:
 - Manually enter 320 hours (replace the 1920 hours)
 - Year 1, enter the salary (currently $\$4,282 \times 1.025 = \$4,389$) in the “Salary or Wage” column
Year 2 - $\$4,389 \times 1.025 = \$4,499$
 - Each year, the salary must be manually inflated by the 2.5% COL
 - Note: Tuition COL = 4%

7. Modular Subawards

- ❖ Select object code 408
- ❖ Enter the consortium name in the **Short description**
- ❖ For each budget period (year), in column **Requested Direct** – enter **Total Costs** (both Direct Costs and Indirect Costs).
- ❖ In the column **Consortium F&A** – re-enter just the F&A amount.
- ❖ **Please note:** After entering the Consortium F&A, you will see the **Requested Direct** column will automatically recalculate to direct costs only. This is correct.
- ❖ Do **not** change our F&A rate.
- ❖ Please enter for each year of the subaward.
- ❖ When you hit Save, the figures will automatically fill in correctly on SIMS budget.
- ❖ Amounts over the first \$25,000 will be listed as object code 416.

8. Traditional (Detailed) Subawards

- ❖ Select object code 408
- ❖ Enter the consortium name in the **Short description**.
- ❖ In “Requested Direct” column, enter total costs (direct + indirect costs).
- ❖ Do **not** change our F&A rate.
- ❖ Please enter for each year of the subaward.
- ❖ When you hit Save, the figures will automatically fill in correctly on SIMS budget.
- ❖ Amounts over the first \$25,000 will be listed as object code 416.

9. Adding R&R Senior/KeyPersons:

A. Non-Penn State Employees -

- ❖ To add Senior/Key personnel and Biosketch from Other Institutions (example: Consultants, Other Significant Contributors, etc.) :
 - Click on Pencil Icon (Add a Key Person)
 - Click on “Show All” and do a Search for the name.
 - If name is found, highlight name and Click on “Add Selected Key Person”
 - If name is not found, Click on + “Create Professional Profile”
 - Type first, last name and click create New Profile
 - Select *Institution from drop down
 - If Institution name is found, choose the Institution, no further information is needed.
 - If the Institution name is not listed, see “**10. Adding Institution**” below.

B. Penn State Employees – Biosketch Only (unpaid, not on budget) –

- ❖ To add Senior/Key personnel and Biosketch from unpaid Penn State employee:
 - Click on Pencil Icon (Add a Key Person)
 - Select PSU employee or search for their name
 - Click “Add Selected key person”
 - Close manage key person screen that pops up
 - When you return to the R&R Sr/Key page Choose Role as “Other (specify)”
 - Other Project Role: Type **OSC** (this stands for Other Significant Contributor, but type only those 3 letters)

10. Adding Institution:

- ❖ If an institution is not listed in Cayuse, contact Billie Burns X7659 with the Institution information (name, address, etc.)

11. Cayuse

- ❖ Create proposal – type in opportunity number or search
- ❖ Import budget first time and for each additional budget change; otherwise Navigate
- ❖ Importing budget, select “NONE” for Base Salary information (exception DOD)
- ❖ If you are unable to delete Sr/Key Personnel (missing red “x”), you must re-import the budget.

12. Submission

- ❖ After final ORA review, email your grant officer and indicate when the PI approves to submit through Cayuse.

13. RPPR

- ❖ When you are completing a PIAF or ePIAF for an RPPR, you will need to use the current year’s budget period dates.

Further Assistance

- ❖ There is a help button (question mark) that may help you to find some answers to your questions.
- ❖ Please contact Billie Burns X7659 with questions before contacting SIMS admin. If Billie is not available, please contact Sharon Lehman (x5675) or Janelle Roman (x8488)
- ❖ For SF424 assistance, please reference the SF424 information and application guides found here:

<http://grants.nih.gov/grants/funding/424/index.htm#inst>