Sponsored Projects Administration
UNIVERSITY OF GEORGIA

Budget Allocations Job Aid

Creating Budget Allocations in the Grants Portal ensures that Awards are set up correctly in the UGA Financial Systems. Many sponsors use different budget categories than the University System of Georgia. When the PI and the unit administrators convert the sponsor budget into the UGA/USG budget categories using the Budget Allocation Tool, it guarantees that the right codes are opened and the project and spending can move forward as planned without interruption.

SPA reviews all budget allocations prior to award set up for compliance with award terms and conditions. If budget categories requested are not allowed, SPA will reach out to PI and department to alert them and rebudget those funds prior to award set up.

When you receive a Just In Time notification/request, or any indication you may receive funding, login to the Grants Portal and start your budget allocations. A Step by Step Guide and additional resources are below.
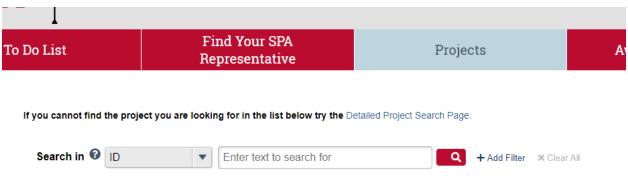
Additional Resources:

Budget Account Identifier Tool

Proactive Award Set Up Tool

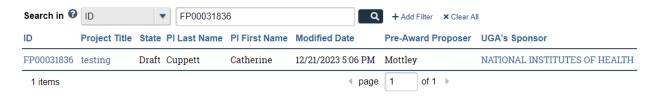Grants Portal Login

Step by Step Guide to Budget Allocation:

1. Login to the Grants Portal and locate the project you want to work on using the search functionality under "Projects".

| To Do List | Find Your SPA Representative | Projects | A |

If you cannot find the project you are looking for in the list below try the Detailed Project Search Page.

Search in ❓ | ID ▼ | Enter text to search for | 🔍 | ➕ Add Filter ✖ Clear All

Please enter search criteria to display data, or hit 🔍 to view all items.

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2. Click on the Project you wish to add budget allocation to in order to open the project workspace.

| Search in ⓘ | ID | ▼ | FP00031836 | 🔍 | + Add Filter | ✕ Clear All |

ID	Project Title	State	PI Last Name	PI First Name	Modified Date	Pre-Award Proposer	UGA's Sponsor
FP00031836	testing	Draft	Cuppett	Catherine	12/21/2023 5:06 PM	Mottley	NATIONAL INSTITUTES OF HEALTH

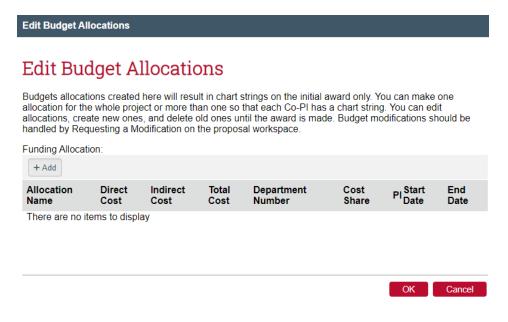1 items   ◁ page [1] of 1 ▷

3. Scroll halfway down till you see a purple button that says "Budget Allocation". Click the button and a pop-up will appear.

Edit Proposal Budgets:
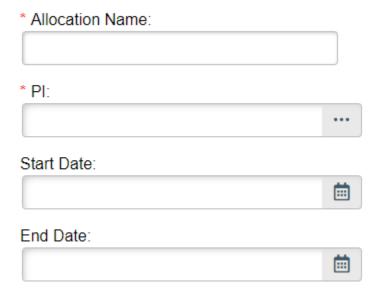
Edit Budget Allocations

4. Click the Add button in the pop-up in order to add budget allocations. Each budget allocation will be a chart string in the UGA Financial System. SPA will review the budget allocations before they are officially created in UGA Financials to ensure compliance with the award terms and conditions.

Edit Budget Allocations

Edit Budget Allocations

Budgets allocations created here will result in chart strings on the initial award only. You can make one allocation for the whole project or more than one so that each Co-PI has a chart string. You can edit allocations, create new ones, and delete old ones until the award is made. Budget modifications should be handled by Requesting a Modification on the proposal workspace.

Funding Allocation:

[+ Add]

Allocation Name	Direct Cost	Indirect Cost	Total Cost	Department Number	Cost Share	PI	Start Date	End Date
There are no items to display								

[OK] [Cancel]

5. Once you click "Add" a new window will appear in the pop-up. It is called Add Funding Allocation UGA. The funding allocation starts with basic information like a name, the PI for the chart string, the start and end dates:

Add Funding Allocation UGA

* Allocation Name:

[   ]

* PI:

[   ] [...]

Start Date:

[   ] [📅]

End Date:

[   ] [📅]

6. It also asks basic questions to determine if participant support is required. If participant support is required then you will make 2 budget allocations. One for the main project, and one for participant support costs only. The questions are interactive and if you say yes, more will appear. Only the account codes for participant support will appear on the allocation if you answer yes.

* Does this project entail the hosting of a workshop, conference, seminar, symposium, or other short-term instructional or information-sharing activity?:
● Yes ○ No Clear

* Does this project anticipate financially supporting participants via stipends, subsistence allowances, travel allowances and/or registration fees and is included in the budget you are currently making below?
PLEASE NOTE: Participants are the recipient of a service or training. Participants include students, scholars, and scientists from other institutions, individuals from the private sector, teachers or state/local government personnel. Participants do not include UGA employees.
● Yes ○ No Clear

Domestic Travel (641000): $0.00

International Travel (641200): $0.00

Technical Materials and Supplies (714000): $0.00
(includes all operating costs not listed below - lab supplies, publications, page charges, core services, etc.)

Participant Subsistence (751111): $0.00
(Only for Projects With Participants)

Stipends (783000): $0.00
(Payments to individuals during a period of training. Services are rendered by the trainee. This service is required of all students involved in the program.)

Indirect Costs (951100): $0.00

Total Costs: $0

7. Additional questions determine if research incentives are needed. If they are, then the account code for research incentives will appear. If not, it will remain hidden.

* Does this project anticipate the compensation of human subjects? Such compensation can be monetary (debit/gift card, cash, etc.) or non-monetary (free health services, educational materials, tokens of appreciation). Monetary and non-monetary compensation is for the human subject's time and possibly inconvenience of procedure/s.
○ Yes ○ No *Clear*

8. A final question about cost share is present. If there is cost share and you are making the cost share allocation, select yes and enter the cost share budget below. You will also be required to provide the fund code, the class code, and the department number for the cost share chart string. You will also need to create the non-cost share allocation separately.

* Is this a Cost Share budget?: ● Yes ○ No *Clear*

* Department ID for allocation below:

[···]

* Fund:

[   ]

* Class:

[   ]

9. The budget allocation itself is divided into black and orange categories. All account code categories require a budget justification, but orange codes are uncommon for sponsored projects and should be specifically detailed in the budget justification.

Faculty/Student/Scientific Staff Salaries/Payroll (510000):
(total salary for all non-administrative personnel - faculty, graduate students, techs, etc.) — $0.00

Administrative Staff Salaries/Payroll (522000): — $0.00

All Fringe Benefits (550000):
(total fringe for all personnel) — $0.00

Domestic Travel (641000): — $0.00

International Travel (641200): — $0.00

International Travel - VISA/Passport Fees (641290): — $0.00

Technical Materials and Supplies (714000):
(includes all operating costs not listed below - lab supplies, publications, page charges, core services, etc.) — $0.00

Clothing (714200):
(excludes scientific/protective clothing) — $0.00

Office Supplies (714101):
(pens, paper, pencils, computer parts<$100, etc.) — $0.00

Postage/Stamps (714110):
(excludes shipping which is included under Materials & Supplies) — $0.00

Licenses - non-software (714112): — $0.00

Books, e-books, and Subscriptions (714113): — $0.00

Entertainment (714116):
(usually unallowable) — $0.00

Utilities (717000): — $0.00

Conferences/Workshops (727111): — $0.00

Membership Fees/Dues (727130): — $0.00

Advertising (727200): — $0.00

Employee Group Meals (727700):
(Requires Sponsor prior-approval) — $0.00

Software (733000): — $0.00

Equipment under $5000 (743000):
(Requires Equipment Tag at UGA) — $0.00

Computers and Servers (744000):
(includes Computer Supplies >$100) — $0.00

Rental Fees/Real Estate (748000): — $0.00

Consulting Services/Per Diem (751000):
(includes consulting contract/procurement services) — $0.00

Telecommunications (771000):
(Requires sponsor approval - phones, cell, internet, etc.) — $0.00

Subrecipients <25,000 (753120):
(Subawards/Subcontracts) — $0.00

Subrecipients >25,000 (753121):
(Subawards/Subcontracts) — $0.00

Fellowships (782000):
(Grants-in-aid to graduate students. Has both an educational and application component) — $0.00

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Stipends (783000):
(Payments to individuals during a period of training. Services are rendered by the trainee. This service is required of all students involved in the program.)

$0.00

Tuition and Fees (784000):
(at UGA only)

$0.00

Equipment >$5000 and useful life of 1 year or more (800000):

$0.00

Lease/Purchase (818000):

$0.00

Indirect Costs (951100):

$0.00

Total Costs: $0

Please click "Ok and Add Another" if you would like to add a budget allocation for a Co-PI

10. Once you enter the allocation budget, if you only need one allocation and one chart string, click ok. If you need more than one allocation/more than one chart string, click ok an add another to complete an additional chart string.

Please click "Ok and Add Another" if you would like to add a budget allocation for a Co-PI

* Required   [OK]   [OK and Add Another]   [Cancel]

11. Once all chart strings are completed click ok and return to the Edit Budget Allocations Page. Here you can view a summary of the allocations you made.

Edit Budget Allocations

Budgets allocations created here will result in chart strings on the initial award only. You can make one allocation for the whole project or more than one so that each Co-PI has a chart string. You can edit allocations, create new ones, and delete old ones until the award is made. Budget modifications should be handled by Requesting a Modification on the proposal workspace.

Funding Allocation:

[+ Add]

Allocation Name	Direct Cost	Indirect Cost	Total Cost	Department Number	Cost Share	PI	Start Date	End Date	
Cuppett - test	$700.00	$0.00	$700.00	4300 MECHANICAL SYSTEMS	no	Catherine Cuppett	1/1/2024	12/31/2024	⊗
Cuppett - Participant Support	$1,000.00	$0.00	$1,000.00	4300 MCHE Mechanical Sys		Catherine Cuppett	1/1/2024	12/31/2024	⊗

[OK] [Cancel]

12. If you have completed all budget allocations click OK in the bottom right. When the award is reviewed by SPA these allocations will be reviewed and used for award set up. If there are any issues or questions, SPA will reach out to the PI and unit for clarification.

Thanks 😊