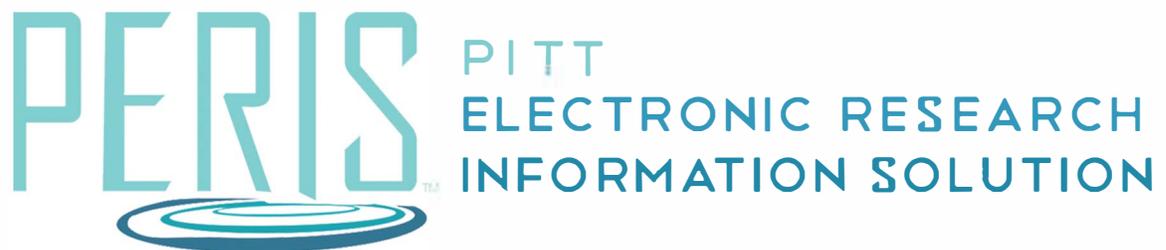




University of Pittsburgh



Quick Reference

CREATING AND ROUTING A SUBACCOUNT.....2-4

Creating a Subaccount

1
Create Additional Budget

2
1. * **Budget title:** (81 characters & spaces max. for NIH)

Subaccount 1

2. * **Principal investigator for this budget:** ?

Office Trainer

3a
* **Is this a Subaccount budget?**

Yes No [Clear](#)

3b
Department responsible for the Subaccount:

History ...

Department Administrator responsible for Subaccount

Test Study Staff ...

3c
* **Is this work On or Off Campus?** ?

If you change the rate from On-Campus, it will be necessary to click [SAVE](#)

On Campus

3d
* **Does this budget use the standard indirect cost base and rates?**

Yes No [Clear](#)

3e
* **Do you intend to complete a detailed budget?**

Yes No [Clear](#)

4
Include in proposal budget?

Yes No [Clear](#)

Where to start?

1. From the Workspace click *Create Additional Budget*.

How do I create the subaccount?

2. Give the budget a title and select the Subaccount PI.
3. Complete the General Budget Information SmartForm.
 - a. Indicate yes, this is a Subaccount budget.
 - b. Select the Subaccount Department and Department Administrator.
 - c. Indicate if the work is On or Off Campus. If you change the rate from On-Campus click Save for the correct rates to appear.
 - d. Determine if the budget uses the standard indirect cost base and rates. If not select *No*. A table will appear where you can provide the Base Type and rates being used. You will also need to indicate why standard rates are not being used.
 - e. Indicate if a detailed budget is being completed for the subaccount. If *No*, an upload will be required.
4. Determine if this subaccount budget should be rolled into a master budget. If so select *Yes*. If the subaccount costs were included in the master budget or if your budget is modular select *No*.
5. Click *Continue*.

Creating a Subaccount

6

Person: Person TBA/TBH

Appt: 12 months

Role: Co-Investigator

Key:

Apply Inflation Rate

Base Salary \$ 100000.00

Effort: 10 %

SalReq: 10 %

Base: \$ 100000.00

Req: \$10,000.00

FB Rate: 31.3 %

FB: \$3,130.00

7

*Cost Type: Direct Costs F&A Applied

Desc:

Cost: \$ 5000

9

Send for Subaccount Review

10

Subaccount Reviewer:

12

Financials	Subaward	Documents	Snapshots	History
Activity				
Subaccount Review Completed				
Sent for Subaccount Review				

- If you are completing a detailed budget for the subaccount enter your Personnel and General Costs. *See Creating a Detailed Budget Quick Guide for more information.
- If you are not completing a detailed budget for the subaccount enter the Direct Costs F&A Applied and/or Direct Costs F&A not Applied for General Costs.
- Attach and subaccount documents that are required for internal purposes and click *Finish*.

How do I send the Subaccount for review?

- In the Subaccount Budget workspace click *Send for Subaccount Review*.
- Choose the Subaccount Reviewer. This is the individual that will review and approve the subaccount.
- Add Comments or attachments if necessary and click *OK*.
- The History tab in your subaccount workspace will show that the subaccount was sent for review and when the review is completed.

Creating a Subaccount

13

All subaccount budgets must be approved before routing begins. If a funding proposal is routed prior to the approvals being obtained there will be no option for the subaccount department to approve the subaccount budget.

14

The subaccount departments will only see the budget that you as the master department have routed to them for approval.

15

No, the solution does not have the capability to create modular budgets from multiple budgets. When a modular budget is being submitted for the overall proposal, the subaccount budget feature should be used as a routing tool to obtain approval for the subaccount, but that budget should not be included in the proposal.

Instead, one cumulative budget should be created that includes all costs for the project. That budget should be included in the proposal. The solution will use the cumulative budget to create the modules.

Subaccount Tips

- 13.** Can I route a proposal without an approved subaccount budget?
- 14.** Will the subaccounts only see their subaccount budget, or will they see the entire budget?
- 15.** Does the MyFunding module create modular budgets with the subaccount budgets included?