



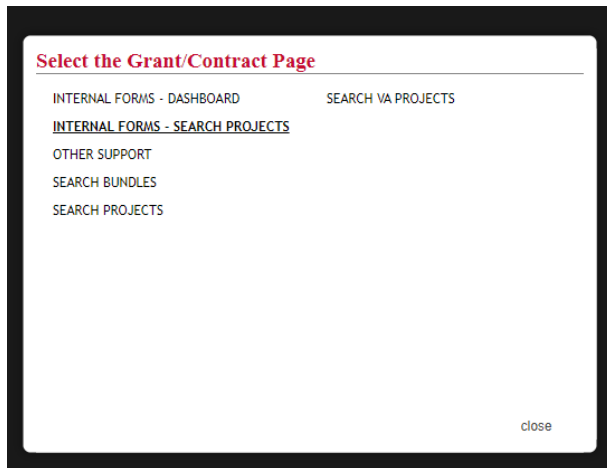
ADIS Internal Budget

What you need:

1. Sponsor Budget - obtained from Department Coordinator once agreed upon with Sponsor
(Exhibit A = Sample Sponsor Budget that correlates to example below)
2. Optional: CRC Internal Budget (if applicable)

Steps:

1. Log into ADIS (<https://edge.unmc.edu/adis/index.php>). Navigate to the top menu bar and click on Research > Research Administration > Manage Grants/Contracts > Internal Forms – Search Projects.



Click the Industry Sponsored Contracts radial button, and enter the PI's last name in the designated field to search for the project for which you are completing internal forms. You can enter additional information, such as the Sponsor name, if you have it.

- Once the project is located, click on the green plus sign and select "Routing/Budget".

Internal Forms - Project Search

project type
 Grants/Subcontracts Industry Sponsored Contracts

old name: full name: department:

value: project id: ir id: sponsor:

title: year:

project id	if id	sponsor	title	begin date	end date	status	staff member	role
000000	0	MIRIAM BIRBAUM, MD	A multi-center single arm phase II study to evaluate the safety and efficacy of genetically engineered antibodies with co-receptor with CD200 with CD200 gene/CD200 antibody (engineered monoclonal antibody) (MIRIAM BIRBAUM, MD)			Pending	BIRBAUM, MIRIAM	PI

Form to Add

Routing/Budget

Supplement

Click OK to confirm the Forms selected above. To Cancel any actions, click the X.

Internal Forms - Routing Form

status: sponsored program contact:

primary principal investigator search: faculty member:

contact name search:

contact person #1 search: phone: zip:

contact name search:

contact person #2 search: phone: zip:

The Routing Form will appear and has been pre-populated with project-specific information. Complete additional fields as required (required fields are identified with a red star) and progress to the next page, General Budget Information.

- Enter the project begin date (typically today's date) and the project end date and F&A rate will automatically populate. Inflation Factor is optional. From here, locate the Per Patient Costs and Startup Costs on your budget and enter in the identified fields. The Number of Patients entered should be the number of patients that is realistically anticipated to ensure the budget is as accurate as possible. Select the appropriate IRB from the IRB Fees dropdown, and proceed to the next page, Budget Staffing Information.

Internal Forms - General Budget Information

begin date: end date:

inflation factor:

F&A Form:

IRB Fees:

IRB Fees:

4. An accounting department code box will appear on the far right of the page. Click on this to confirm the accounting department for this study.

The PI will automatically pull into the staffing field at the bottom of the page, but a salary and effort will need to be entered. The Department Administrator should have access to the full Institutional Base Salary (IBS) for the PI, but UNeHealth can provide if needed. Effort can be determined by reviewing the final budget and determining how much time the PI will need to spend at each scheduled visit, i.e.; PI (on average) needs 60 minutes for each subject visit for a Study with 24 cycles (one cycle per month)

- a. $60 \text{ (minutes per visit)} \times 12 \text{ (visits per year)} = 720 \text{ (minutes per year)}$
- b. $720 \text{ (minutes per year)} / 60 \text{ (minutes per hour)} = 12 \text{ (hours per year)}$
 - i. As a general rule, 20.8 hours per year = 1% effort
- c. If you plan on enrolling 1 patient per year, PI effort should be 1%; 2 patients per year, PI effort should be 1-2%.
 - i. Generally, we recommend rounding up to 1% effort for anything under 20.8 hours
- d. Optional: if using CRC internal budget, PI time in minutes per cycle is a line item which can be quickly calculated into effort per year.

grant salary		cost sharing salary	
<input checked="" type="checkbox"/> Inflation Factor	0.00%	<input type="checkbox"/> Split Benefits	
ibs salary	300000	<input checked="" type="checkbox"/> Apply Effort Changes to future periods	
% benefits	25.90	% effort	0.00
% effort	1.00	salary requested	0
# months this year	6.00	benefits	0
# months next year	18.00	source:	
# months 2 years out	0.00	note:	Source Numbers should start with 31, 32, 33, or 37.
annualized salary	300000		
salary requested	6000		
benefits	1954		
total	7954		

5. Add personnel as needed using the Personnel search fields at the top of the page, entering the appropriate accounting department title and position for each, and using full IBS for each. Any salaries below the NIH cap will pull in automatically. To determine Coordinator effort:
 - a. To Review final Sponsor Budget (Exhibit A) and determine how much time Coordinator will need to spend at each scheduled visit per year, i.e.; Coordinator (on average) needs 300 minutes for each patient for a Study with 24 cycles (one cycle per month)
 - i. $300 \text{ (minutes per visit)} \times 12 \text{ (visits per year)} = 3600 \text{ (minutes per year)}$
 - ii. $3600 \text{ (minutes per year)} / 60 \text{ (minutes per hour)} = 60 \text{ (hours per year)}$
 - iii. $60 \text{ (hours per year)} / 20.8 \text{ (hours per 1% effort)} = 3\% \text{ (effort per patient per year)}$

- b. If you plan on enrolling 1 patient per year, Coordinator(2) effort should be 3%; 2 patients per year, Coordinator(s) effort should be 6%.
 - c. Optional: if using CRC budget, use Coordinator effort line item to calculate.
 6. Once all staff have been entered, proceed to the next page, Budget Other Expenses Information.
 7. The Budget Other Expenses Information page will calculate your budget Grand Total. The IRB fees will automatically pull into the Exempt field (1). The only other field that will be used is the Operating field (2). Enter the amount noted in the Over/Short amount field (3) into the Operating box to find your Grand Total. As you are entering the amount in the Operating field, you will see the Grand Total update in real time.

Internal Forms - Budget Other Expenses Information

tdc budgets	period 1
Salaries	545,769.00
Benefits	513,008.00
Operating	0.00 <input type="text"/>
Consultants	50.00
Subcontracts	0.00 <input type="text"/>
Exempt	1000.00 <input type="text"/>
Supplies	0.00 <input type="text"/>
Travel	0.00 <input type="text"/>
Equipment	0.00 <input type="text"/>
Gov't Aid	0.00 <input type="text"/>
Over/Short Amount	5150,278.00 <input type="text"/>
Total Direct	559,777.00
Less: F B A Exempt	
Subcontracts > ZSK	50.00
Exempt	51,000.00
Capital Equipment	50.00
Gov't Aid	50.00
F B A Basis	558,777.00
F B A Rate	28.00
F B A Costs	516,458.00
Grand Total	576,235.00

Internal Forms - Budget Other Expenses Information

tdc budgets	period 1
Salaries	545,769.00
Benefits	513,008.00
Operating	150278 <input type="text"/>
Consultants	50.00
Subcontracts	0.00 <input type="text"/>
Exempt	1000.00 <input type="text"/>
Supplies	0.00 <input type="text"/>
Travel	0.00 <input type="text"/>
Equipment	0.00 <input type="text"/>
Gov't Aid	0.00 <input type="text"/>
Over/Short Amount	50.00 <input type="text"/>
Total Direct	5210,055.00
Less: F B A Exempt	
Subcontracts > ZSK	50.00
Exempt	51,000.00
Capital Equipment	50.00
Gov't Aid	50.00
F B A Basis	5209,055.00
F B A Rate	28.00
F B A Costs	558,535.00
Grand Total	5268,590.00

8. After Operating expenses have been entered, proceed to the next page, Budget Summary. Review the numbers on this page to ensure they match as anticipated. Proceed to the next page, Designate Signees.
9. The Dean, Chairperson, PI, and UNeHealth Signature Authority will pull in automatically. Select the appropriate Section Chief for your department, and select your UNeHealth contact.

Internal Forms - Designate Signees

Please designate a person for each box listed. The project will not be allowed to be submitted without these designations. If you are missing a person, position or department please contact Sponsor Programs Administration for assistance.

Forms

- Dashboard
- Project Search
- Forms**
- Forms List
- Routing Form
- General Budget Information
- Staffing
- Other Expenses
- Budget Summary
- Pick Signees
- Requirements Summary

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project id	if id	period
principal investigator/director	sponsor	title of project:

Routing Form

Principal Investigator
Int Med Oncology/Hematology

Budget

Principal Investigator
Int Med Oncology/Hematology

Dean
College of Medicine

Chairperson
Internal Medicine

Section Chief
Int Med Oncology/Hematology

UNeHealth SPA Staff
Sponsored Programs Administration

UNeHealth Signature Authority
Vice Chancellor for Research

Click Next to proceed to the next page, Requirements Summary.

- Review the Requirements Summary page. You should see green check marks next to each section. If you see a red x, this indicates that information is missing and you will need to review that section. If all information looks correct, click Send to PI.

Internal Forms - Requirements Summary

Forms

- Dashboard
- Project Search
- Forms**
- Forms List

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internal form id	budget cycle id	status
project type	contract	in Progress

project title

- Routing Form Requirements
- Budget Requirements
- General Budget Requirements
- Budget Staffing Requirements
- Budget Other Expenses
- Budget Summary
- Designate Signees Requirements

concerns regarding the project

Send to PI

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Forms	Position	Department	Signee	Approved	Date Signed
Routing Form	Principal Investigator	Int Med Oncology/Hematology	Leingang, Amanda G		
Budget	Principal Investigator	Int Med Oncology/Hematology	Kathol, Galen L		
Budget	Dean	College of Medicine	Hill, Renee		
Budget	Section Chief	Int Med Oncology/Hematology	Vose, Julie M		
Budget	UNeHealth Staff	Clinical Research Center	Leingang, Amanda G		
Budget	UNeHealth Signature Authority	Clinical Research Center	Kratschvil, Christopher Jon		
PI Assurance	Principal Investigator	Int Med Oncology/Hematology	Leingang, Amanda G		

The page will refresh with a confirmation that “Message successfully sent to Principal Investigator(s)!”.

Internal Forms - Requirements Summary

Forms

- Dashboard
- Project Search
- Forms**
- Forms List

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internal form id	budget cycle id	status
project type	contract	PI Signature

project title

- Routing Form Requirements
- Budget Requirements
- General Budget Requirements
- Budget Staffing Requirements
- Budget Other Expenses
- Budget Summary
- Designate Signees Requirements

concerns regarding the project

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Message successfully sent to Principal Investigator(s)!