Budget Revision Instructions

Awardees need to submit revised budgets and justifications for funding approved projects. (You should have received comments from the CRDF in a prior communication.) The instructions included in this PDF document provide the materials you need to submit your revised budgets.

Step 1: Download Budget Revision Documents. We created a special download site for you to access the budget revision documents. Navigate to this link to find these downloads:

http://www.citrusrdf.org/blog/archives/513

You will see seven documents listed for download on this page. Click on each title to open each document. Of the seven, you will only need to send in 1) a Revised Budget PDF Form; 2) the Resource Personnel Spreadsheet; and optionally the 3) Subcontractor Expense PDF Forms (necessary only if you are working with third-party contractors). Together, these documents comprise your Revised Budget Email Package. The other documents are just to assist you in preparing your materials.

- **Instructions for Submitting Revised Budgets** This is an online copy of the instructions on this page.
- **Revised Budget PDF Form** A two-page PDF Form with space for your budget revision and narrative.
- **Resource Personnel Spreadsheet** A two-page Excel template to provide information about your personnel and allocations for each objective. Complete both tabs on this spreadsheet.
- **Subcontractor Expense Form** Submit this form for each third party with whom you are working.
- **Project ID Numbers** A table containing researcher names, project titles and project ID numbers.

Step 2: Complete the Revised Budget PDF Form. Open the downloaded file **lastname-projectid.pdf**. On Page 1, enter your project title and contact information at the top. Then, add up to a 1000-word narrative to justify your use of funds for expenses listed in each category. Standard typographic practice is to separate sentences using a **single-space**; this will also give you room for 20 to 30 more words in your narrative.

Step 3: Enter Your Budget Numbers. On Page 2 of this same form, complete the budget fields for the coming year as directed. If for continuation funding, the subsequent year budget amount cannot exceed the current year amount. On Page 1, the original budget amount should be the total for all years requested. The Revised Budget amount is the total from Page 2.

Step 4: Rename the Budget Revision PDF Form. Rename your completed PDF Form and save it to a local disk using the PI last name and Project ID number as a unique identifier (e.g., rogers-23.pdf). Separate your name and ID number using a hyphen with no spaces. You can find your Project ID number in the left column of the document you downloaded in Step 1 called, **project-id-2008-project-id.xls**, **project-id-2009-project-id.xls**, or **project-id-2010-project-id.xls**, depending on the year in which your project was first funded.

Step 5: Fill Out Worksheet A of the Resource Personnel Spreadsheet. Next, open the **lastname-projectid.xls** file downloaded in Step 1. On Worksheet A, enter values showing the percent effort for each of the key personnel relative to specific research objectives in the table. You can add or delete columns and rows to accommodate your project design. The objective numbers in the table should correspond with the objective numbers in your proposal.

Step 6: Fill Out Worksheet B of the Resource Personnel Spreadsheet. On Worksheet B of the XLS file, list existing and pending commitments for key personnel during the term of the award. Replace the sample information with your own. In the narrative box provided, outline your plan to fulfill the award if key personnel end up being overcommitted.

Step 7: Rename your XLS Spreadsheet. When done, rename this XLS file and save it to local disk using the PI last name and Project ID Number as a unique identifier (e.g., rogers-23.xls). Use the same nomenclature as you did in your PDF form, except that this is the xls file. Separate the filename text with hyphens and no spaces.

Step 8: Complete the Subcontractor Expense Form. If you have cooperators (consultants, professional services or other institutions) that will receive funds from your project, complete one of these forms for each subcontractor.

Budget Instructions *(continued)*

Step 9: Rename the Subcontractor Expense Forms. Rename your Subcontractor Expense Forms using the PI last name, Project ID number and s1, s2…, etc., as a unique identifier (e.g., rogers-23-s1.pdf). Separate the text with hyphens and no spaces.

Step 10: Send Your Revised Budget Email Package to the CRDF. After you have completed and saved the forms, click on the Submit Revision button in the lower right corner of Page 1 of the Revised Budget PDF Form. An email will be created containing the delivery address and attached Revised Budget PDF Form. If your system does not create this email message, manually compose a new message with the attachment using the address **catp@citrusrdf.org** and with the subject line in all caps of exactly "BUDGET REVISION [Project ID] [Last Name]".

Next, attach your Resource Personnel Detail Spreadsheet and optional Subcontractor Expense Forms to the same email. Add a note to the email if you prefer. Copy yourself with the email to be sure it sends correctly and to provide yourself a backup copy.

Lastly, send all attached documents in this single email message to the email address above.

Special PDF Navigation Tips. Surprisingly, many people do not know the best way to navigate PDF documents. The tips below will make it easier for you to prepare your information, so here are some shortcuts on using PDF files:

- **Ctrl+(+) and Ctrl+(-)** Press the Control key (Command on the Mac) and the plus key at the same time to zoom in on the page. Press again to increase magnification. Press the Control key (Command on the Mac) and the minus key to zoom out.
- **Spacebar** Hold down the spacebar and click-drag with your mouse to pan across a zoomed PDF page.
- **Ctrl-(Ø)** Press the Control key (Command on the Mac) and the number Ø key at the same time to zoom the PDF document out to Full Page View.
- **Ctrl-(l)** Press the Control key (Command key on the Mac) and the lower-case L key at the same time to put the pdf in Presentation Mode. Press Esc to exit.

If you have questions:

Submit your questions about forms completion or software compatibility issues to catp@citrusrdf.org. Someone should respond to your question within 24 hours.

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