

## QUICK GUIDE

### NIFA (USDA) 30% TTF vs 59.5% MTDC

**Overview:** Under the 2018 Farm Bill, a number of USDA NIFA grant programs limit indirect costs to 30 percent of [Total Federal Funds Awarded \(TFFA\)](#). However, if there is a subcontractor we will need to assess whether this 30% TTF rate or the university's negotiated Indirect Cost Rate of 59.5% MTDC provides the USDA/NIFA a better deal (less F&A). This guide will show you how to create an initial budget version using the Sponsor's mandated rate and then create a new version of the same budget with our standard rate. More [on calculation information and Frequently Asked Questions](#).

**STEP 1** – After you have done your initial set up of the proposal, navigate to the **Budget** page and click the **+ Add Budget** button.

**STEP 2** – A pop-up screen will appear where you can name the initial budget version. Create a name that is easily distinguishable and something that clearly identifies the budget version and Indirect Cost type being used. Then select **Create Budget**.

**STEP 3** – Once your initial budget is created go directly to the **Budget Settings** hyperlink at the top of the page and click into it.

Proposal #933 > Budget #1

**Budget #1: Version 1 - 30%TTF**

Marked For Submission: No  
Created: 06/21/2019  
Proposal: #933  
[more...](#)

✓ Data Validation (off) **Budget Settings** Hierarchy Summary Budget Versions Autocalculate Periods Help

Project Personnel + Add Personnel Sync from Proposal

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

Person	Job Code	Appointment Type	Base Salary	Actions
<b>From Proposal Development</b>				
Justin B Richardson (PI)	College (AA001)	Faculty-Academic Year (9M)	0.00	<a href="#">Details</a> <a href="#">✕</a>
Justin B Richardson (PI)	State Retirement And WC/Medicare tax (TSFI)	Faculty-Academic Year (9M)	83,640.00	<a href="#">Details</a> <a href="#">✕</a>

Left sidebar: [Return to proposal](#), [Periods & Totals](#), [Rates](#), **Personnel Costs** (selected), [Project Personnel](#), [Assign Personnel to Periods](#), [Non-Personnel Costs](#), [Subawards](#), [Institutional Commitments](#), [Project Income](#)

**STEP 4** – Another pop-up window will appear and about half way down the page you will see two drop down menus titled **Unrecovered F&A Rate Type** and **F&A Rate Type**. Select **30% Federal TC – No Sub IC** for both drop down menus. Then click the blue **Apply Changes** button.

**Budget Settings**

Project Start Date: 03/01/2020  
Project End Date: 02/28/2023

Total Direct Cost Limit: 0.00

Budget Status: Incomplete

On/Off Campus: Default

Residual Funds: 0.00

Total Cost Limit: 0.00

Unrecovered F & A Rate Type: 30% Federal TC - No Sub IC

F&A Rate Type: 30% Federal TC - No Sub IC

Comments:

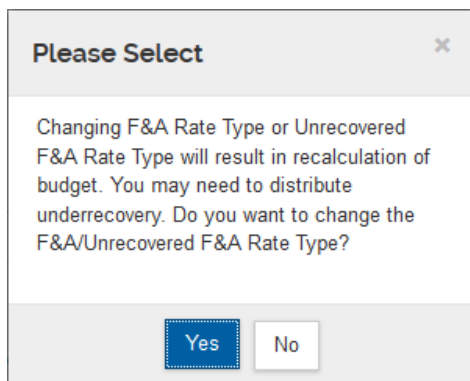
Modular Budget: ☐

Submit Cost Sharing: ☒

Exclude Subcontract F&A from Direct Cost Limit: ☐

[Apply Changes](#) [Close](#)

**STEP 5** – A pop-up box will appear telling you that this change will cause a recalculation of the budget and ask if you want to move forward with the changes. Select **Yes**.



**STEP 6** – Build out your budget.

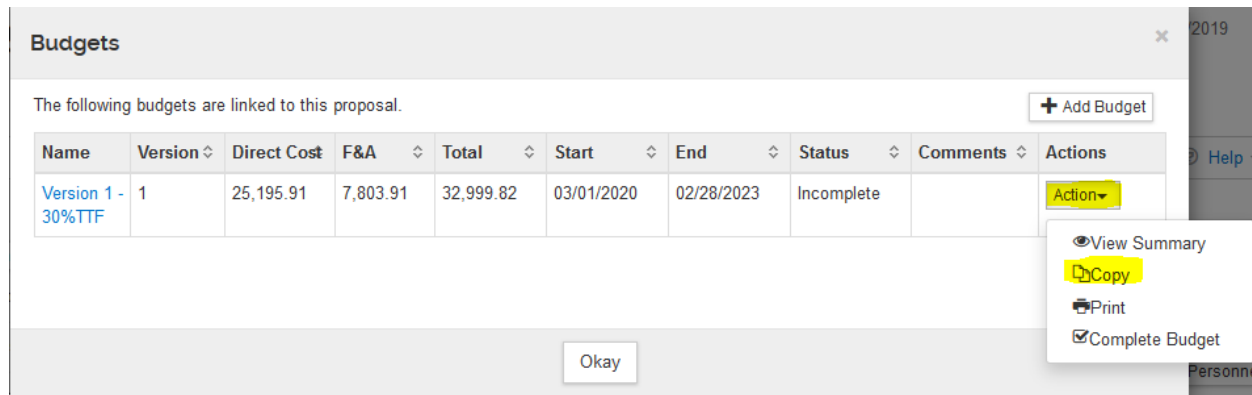
**STEP 7** – Once your budget is built and you are satisfied with where it stands, make sure you hit **Save** and then click either **Return to Proposal** in the upper right corner or click **Budget Versions** in the upper left corner.

Description	Quantity	Total Base Cost	Actions
<b>Other Direct</b>			
Material and Supplies		3,000.00	Details
Subcontractor<=25K	STANFORD UNIVERSITY	25,000.00	Details
Subcontractor>25K	STANFORD UNIVERSITY	30,427.00	Details
Tuition Charge		6,988.00	Details
<b>Travel</b>			
Domestic Travel		2,000.00	Details

Whichever button you decide to select you will be brought to a screen that looks like this:

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
Version 1 - 30%TTF	1	25,195.91	7,803.91	32,999.82	03/01/2020	02/28/2023	Incomplete		Action

**STEP 8** – Click the **Action** drop down button next to your most recent/accurate budget version and select **Copy**.



**Budgets**

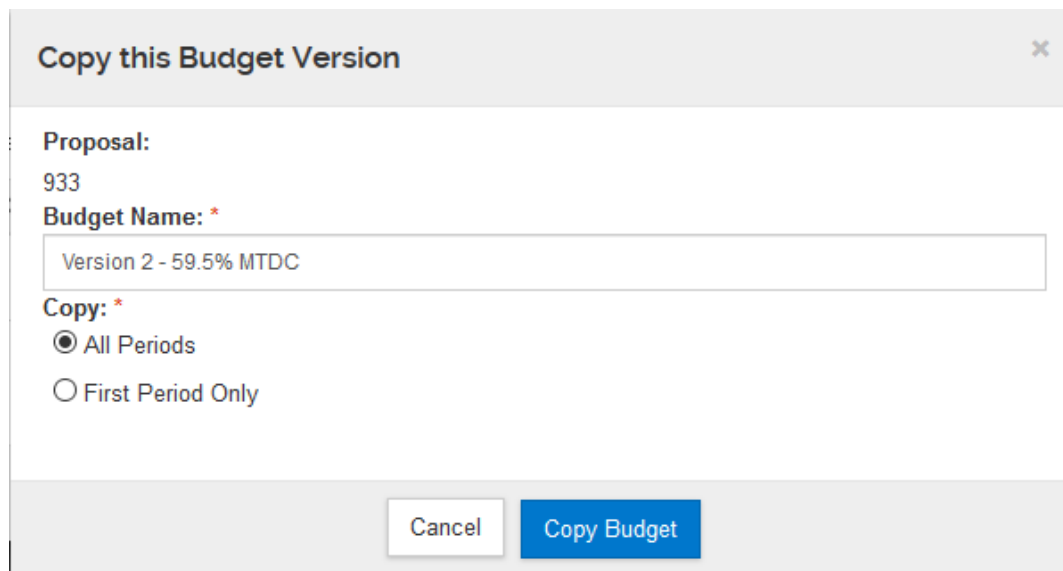
The following budgets are linked to this proposal.

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
Version 1 - 30%TTF	1	25,195.91	7,803.91	32,999.82	03/01/2020	02/28/2023	Incomplete		Action

Okay

- View Summary
- Copy
- Print
- Complete Budget

**STEP 9** – Another pop-up box will appear entitled **Copy this Budget Version**. Here it will ask you to create a new budget name. Again, create a name that is easily distinguishable and something that clearly identifies the budget version and Indirect Cost type being used. Then select the **All Periods** radio button and click the blue **Copy Budget** button.



**Copy this Budget Version**

Proposal:  
933

Budget Name: \*

Version 2 - 59.5% MTDC

Copy: \*

☒ All Periods

☐ First Period Only

Cancel Copy Budget

**STEP 10** – Once your new budget version is created go directly to the **Budget Settings** hyperlink at the top of the page and click into it.

Proposal #933 > Budget #2

## Budget #2: Version 2 - 59.5% MTDC

Marked For Submission: No  
Created: 06/21/2019  
Proposal: #933  
[more...](#)

✓ Data Validation (off) **Budget Settings** | Hierarchy | Summary | Budget Versions | Help

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Rates

**Personnel Costs** ▾

Project Personnel

Assign Personnel to Periods

Non-Personnel Costs

Subawards

Institutional Commitments >

### Project Personnel

+ Add Personnel | Sync from Proposal

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

Person	Job Code	Appointment Type	Base Salary	Actions
<b>From Proposal Development</b>				
Justin B Richardson (PI)	State Retirement And WC/Medicare tax (TSF)	Faculty-Academic Year (9M)	83,640.00	Details ✕
<b>Other Personnel</b>				
Grad Students - Academic - 1	DEFAULT (AA000)	Graduate Student Academic (9M)	27,154.95	Details ✕

**STEP 11** – Another pop-up window will appear and about half way down the page you will see two drop down menus titled **Unrecovered F&A Rate Type** and **F&A Rate Type**. Select **Standard Federal MTDC** for both drop down menus. Then click the blue **Apply Changes** button.

### Budget Settings

Project Start Date: 03/01/2020

Project End Date: 02/28/2023

Total Direct Cost Limit: 0.00

Budget Status: Incomplete ▾

On/Off Campus: Default ▾

Residual Funds: 0.00

Total Cost Limit: 0.00

Unrecovered F & A Rate Type: **Standard Federal MTDC** ▾

F&A Rate Type: **Standard Federal MTDC** ▾

Comments:

Modular Budget: ☐

Submit Cost Sharing: ☒

Exclude Subcontract F&A from Direct Cost Limit: ☐

**Apply Changes** | Close

**STEP 12** – A pop-up box will appear telling you that this change will cause a recalculation of the budget and ask if you want to move forward with the changes. Select **Yes**.

Please Select

Changing F&A Rate Type or Unrecovered F&A Rate Type will result in recalculation of budget. You may need to distribute underrecovery. Do you want to change the F&A/Unrecovered F&A Rate Type?

Yes

No

**STEP 13** – make sure you hit **Save** and then click either **Return to Proposal** in the upper right corner or click **Budget Versions** in the upper left corner.

Data Validation (off)

Budget Settings

Hierarchy

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Personnel Costs

Project Personnel

Assign Personnel to Periods

Non-Personnel Costs

Project Personnel

+ Add Personnel

Sync from Proposal

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

Person	Job Code	Appointment Type	Base Salary	Actions
From Proposal Development				
Justin B Richardson (PI)	State Retirement And WC/Medicare tax (TSFI)	Faculty-Academic Year (9M)	83,640.00	Details
Other Personnel				
Grad Students - Academic - 1	DEFAULT (AA000)	Graduate Student Academic (9M)	27,154.95	Details

Whichever button you decide to select you will be brought to a screen that looks like this:

## Budgets

[+ Add Budget](#)

The following budgets are linked to this proposal.

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
Version 1 - 30%TTF	1	243,802.89	95,508.72	339,311.61	03/01/2020	02/28/2023	Incomplete		Action
Version 2 - 59.5% MTDC	2	243,802.89	48,526.95	292,329.84	03/01/2020	02/28/2023	Incomplete		Action

**STEP 12** – Click on the **Action** drop down button next to the budget with the **LOWER** overall total. Then click **Include for Submission**.

**Budgets** ✕

The following budgets are linked to this proposal. + Add Budget

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
Version 1 - 30%TTF	1	243,802.89	95,508.72	339,311.61	03/01/2020	02/28/2023	Incomplete		Action
Version 2 - 59.5% MTDC	2	243,802.89	48,526.95	292,329.84	03/01/2020	02/28/2023	Incomplete		Action

View Summary  
Copy  
Print  
Complete Budget  
Include for Submission

Okay

**NOTE:** If you have a subcontractor that is using an IDC rate that is lower than the 30% TTF (42.857 MTDC) rate, we are going to try and increase our F&A rate to incur the difference. For instructions on how to do these please contact the Kuali Helpdesk (link below). Further, please include the [pre-award@umass.edu](mailto:pre-award@umass.edu) email in the “Email Address 2” field.

## GET HELP

**KUALI GUIDES:** <https://www.umass.edu/research/kuali-guides>

**KUALI FAQs:** <https://www.umass.edu/research/kuali-research-faq>

**KUALI HELP DESK:** <https://www.umass.edu/research/webform/kuali-help-desk>