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.

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.

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**.

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?
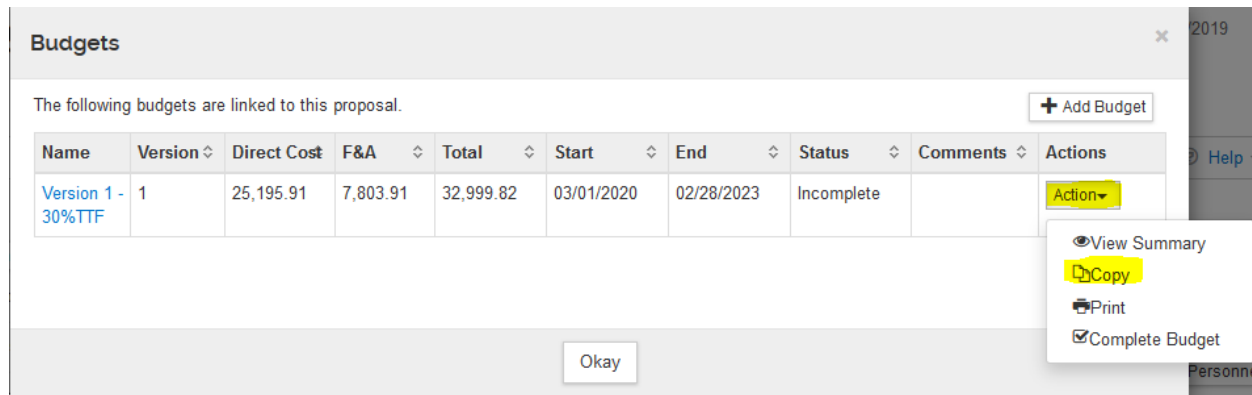
Yes   No

STEP 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.

✔ Data Validation (off) ⚙ Budget Settings ≣ Hierarchy 👁 Summary ▣ Budget Versions ⑦ Help ▾

« Return to proposal

↓F Periods & Totals

▤ Rates

👤 Personnel Costs   ⌄
    Project Personnel
    Assign Personnel to Periods
📄 Non-Personnel Costs
🖉 Subawards
🔔 Institutional Commitments   ›
▣ Project Income
✔ Modular   ↗
≣ Budget Notes

Non-Personnel Costs
Add and configure non-personnel items for this budget period.

| Period 1 | Period 2 | Period 3 |

Period 1   Assign Non-Personnel...

Description ⇕	Description ⇕	Quantity ⇕	Total Base Cost ⇕	Actions
Other Direct				
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 🗑
Travel				
Domestic Travel			2,000.00	Details 🗑

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

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	25,195.91	7,803.91	32,999.82	03/01/2020	02/28/2023	Incomplete		Action▾

Okay

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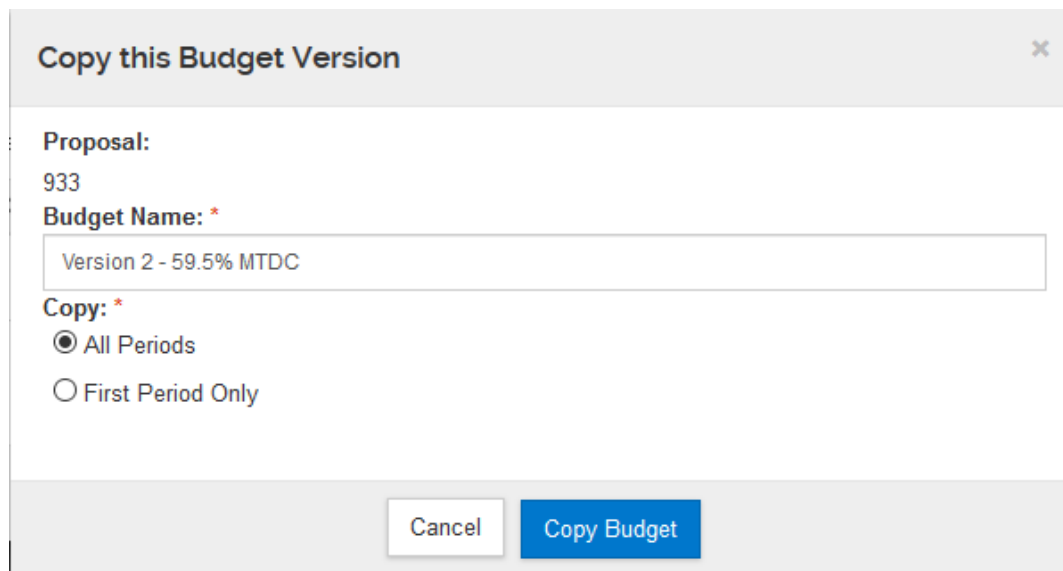

STEP 9 – Another pop-up box will appear entitled **Copy this Budget Version**. Here it will ask you to create a new budget name. Again, create a name that is easily distinguishable and something that clearly identifies the budget version and Indirect Cost type being used. Then select the **All Periods**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

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.

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.

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**.

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.

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

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	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**.

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 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