

**Guidance for Peoplesoft-Proposal Express Escalating Rate Checkbox: New escalating F&A rates effective 07/01/2012**

In order to facilitate the use of the federally negotiated F&A rate on Proposal Express, the following data requirements will need to be adhered to:

- 1) If the checkbox for “Budgets calculated using an escalating Indirect Cost Rate” is not selected (as shown below):

Facilities and Administration (Indirect) Costs	
Indirect Cost Rate:	<input type="text" value="26.00"/> <input type="checkbox"/> Budgets calculated using an escalating Indirect Cost Rate.
FA Base	<input type="text" value="A"/> <input type="button" value="Search"/> Modified Total Direct (MTDC)

The rate entered must be less than 56.5% and the entered rate cannot be simultaneously greater than 0 and less than 1 (this is to prevent user from entering 0.26 instead of 26.00). Failure to meet these conditions will result in an error message from the system.

- 2) If the checkbox for “Budgets calculated using an escalating Indirect Cost Rate” is selected (as shown below):

Facilities and Administration (Indirect) Costs	
Indirect Cost Rate:	<input type="text" value="56.50"/> <input checked="" type="checkbox"/> Budgets calculated using an escalating Indirect Cost Rate.
FA Base	<input type="text" value="A"/> <input type="button" value="Search"/> Modified Total Direct (MTDC)

- a. If the Proposal start date is on or after 07/01/2012, but before 07/01/2013, then the rate entered must be 56.5%.
- b. If the Proposal start date is on or after 07/01/2013, but before 07/01/2014, then the rate entered must be 57.0%.
- c. If the Proposal start date is on or after 07/01/2014, but before 07/01/2015, then the rate entered must be 58.0%.
- d. If the Proposal start date is on or after 07/01/2015, then the rate entered must be 58.5%.

Failure to meet one of the above conditions will result in an error message from the system with an explanation.

- 3) “Copy Proposal Express” proposal function: when this function is used, the newly created proposal will need to be adhered to the following requirements:
  - a. The escalating Indirect Cost Rate checkbox will not be initially checked -- the user will have to determine if this applies or not to the newly created proposal.
  - b. The F&A rate and base code will be initially blank -- the user will need to enter the base code and rate for the new proposal to make sure that the values are correct/applicable.