



# Budget Development for NCAI Fund Victim Services Micro-grant Program

SEPTEMBER 3, 2020

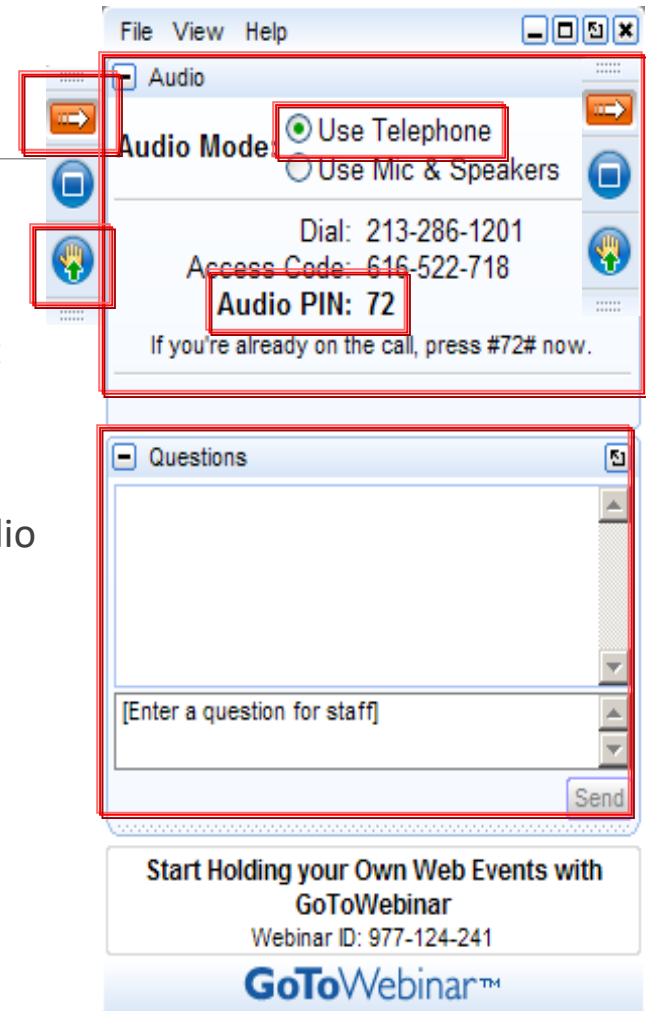
*This webinar was produced by the National Congress of American Indians Fund under 2019-VO-GX-K145, awarded by the Office for Victims of Crime, Office of Justice Programs, U.S. Department of Justice. The opinions, findings, and conclusions or recommendations expressed in this webinar are those of the contributors and do not necessarily represent the official position or policies of the U.S. Department of Justice.*



# Before we begin...

Here are some friendly housekeeping reminders:

1. Your control panel will appear on your user screen.
2. To minimize the control panel, use the orange arrow at the top left panel.
3. All attendees will be muted during the presentation.
4. Once you call into the meeting call line, enter your Audio PIN shown on your control panel.
  - i. In Audio: you can view, select, and test your audio.
5. Use the questions box on your panel to submit questions and responses via text.
6. During the discussion portion, please 'raise' your hand by clicking the hand icon to signal to be unmuted.
7. Everyone will receive an email with a link to a survey about today's session.
8. A recording of the webinar will be made available on [www.tribalvictimservices.org](http://www.tribalvictimservices.org).



# Welcome

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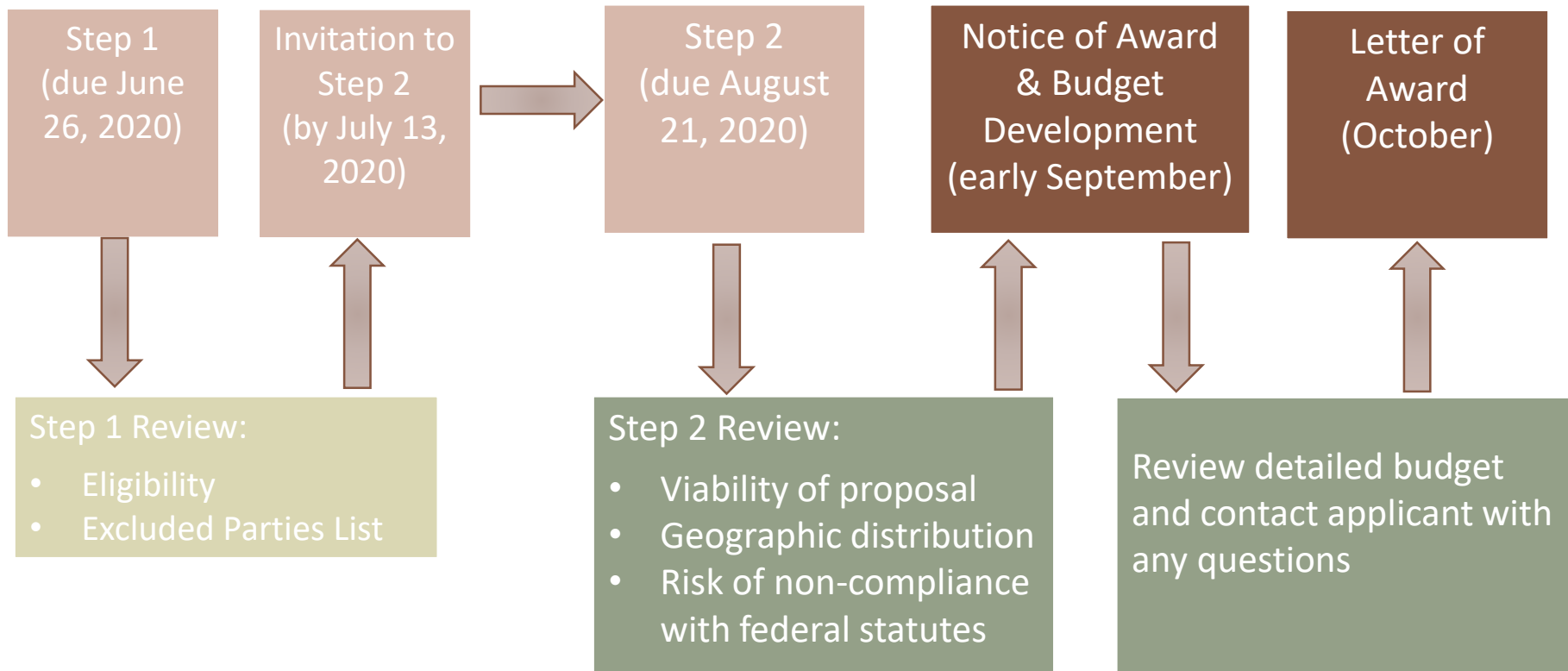
Goal: Guidance on the development of a budget for crime victim services programming in order for grantees to successfully submit their budget for the micro-grant program.

Panelists:

- Robin Paterson, Project Manager, FirstPic, Inc.
- Kelly Crowe, Project Director, FirstPic, Inc.

# Application Process

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What can  
funding be  
used for?

Examples of  
Victim  
Services  
include:

- Victim advocate or victim assistance program
- Domestic violence shelter
- Rape crisis center
- Child advocacy center
- Elder abuse program
- Mental health counseling
- Substance abuse treatment
- Legal services
- Forensic exams
- Emergency shelter
- Transitional housing
- Traditional, cultural, or alternative therapy
- Transportation, meals, lodging, child care for court or counseling

A chart of allowable and unallowable costs can be found at [https://tribalvictimservices.org/wp-content/uploads/2020/05/AppendixA\\_allowablecosts.pdf](https://tribalvictimservices.org/wp-content/uploads/2020/05/AppendixA_allowablecosts.pdf)

# What can funding be used for?

## Examples include:

- Salary
- Fringe benefits
- Travel
- Equipment
  - Vehicles
  - Security system at victim service facility
  - Remote access equipment in court
- Facility costs – rent, utilities, maintenance, renovation
- Supplies
  - Computers, printers, scanners
  - Cell phone
  - Office supplies, furnishings
  - Cultural items and supplies for victim healing
- Emergency needs for victims
- Program operating costs
- Subcontracts
- Indirect costs

## What is unallowable?

Examples  
include:

- Law enforcement/prosecution
- Crime prevention
- Services for offenders
- Construction or purchase of real estate
- Lobbying
- Fundraising
- Grant-writing

A chart of allowable and unallowable costs  
can be found:

[https://tribalvictimservices.org/wp-content/uploads/2020/05/AppendixA\\_allowablecosts.pdf](https://tribalvictimservices.org/wp-content/uploads/2020/05/AppendixA_allowablecosts.pdf)

# Sign in at

<https://firstpic.force.com/ncai/>

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To access this page, you have to log in to NCAI.

Username

Password

Log In

☐ Remember me

[Forgot Your Password?](#)





HELLO MATT BIELER (LOCAL).

To complete your Stage 2 application click [here](#).

Incomplete Applications

Application Id	Status	Submitted Date
APP-00442	Sent to Applicant	



To enter a budget, select the “Sub-Grants” tab.

HELLO MATT BIELER (LOCAL).

To complete your Stage 2 application click here.

Incomplete Applications		
Application Id	Status	Submitted Date
APP-00442	Sent to Applicant	



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OVC Example Org 2

Dashboard

About

Applications

Sub-Grants

Reimbursements

Logout

## SUB-GRANTS

Grant: View All

Sub-Grant Name:

Status: View All

Sort By: Name

Update

View All

Export Results

View My Assignments

Sub-Grant Name

Awarded

Total Budgeted

Requested Amount

Approved Amount

Balance

Status

OVC Example Org 2 Grant

\$75,000.00

\$0.00

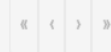
\$0.00

\$0.00

\$0.00

Incomplete

1 - 1 of 1



View Closed Grants

Click on the sub-grant related to the budget you are creating.

For this program, there should just be one sub-grant listed here.



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OVC Example Org 2



## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

**Organization:** OVC Example Org 2 **Date Range:** 10/1/2020 - 6/30/2022 **Duration:** 638.00 **Status:** Incomplete

**Total Budgeted:** \$0.00 **Requested Amount:** \$0.00 **Approved Amount:** \$0.00 **Balance:** \$0.00

**Indirect Rate:** 0.0% **Procurement Threshold:**

Click "Update Budget"  
to begin the budget  
submission process.

Update Budget

NOTE: This budget has not yet been submitted. Please review and click submit.

Submit

### Personnel

Title	Hourly/Salary Rate/Salary	Grant Hrs/Wk	Wks on Grant	% on Grant	Amount Allocated	Requested Amount	Approved Amount	Balance	Notes
-------	---------------------------	--------------	--------------	------------	------------------	------------------	-----------------	---------	-------

### Fringe Benefits



**Please Note:** When first entering your budget in the online reporting site:

- **“Update Budget & Indirect Rate”** should be used to move forward in the initial submission process.
- “Update Budget” option should only be used when submitting a budget revision request later in the program that does not include a change of the indirect cost rate.

Indirect Rate: 10.0%

### Update Budget

You will not be able to submit any reimbursement requests until your updated budget has been submitted and approved. Are you sure you want to continue?

Cancel

Update Budget

Update Budget & Indirect Rate

Update Budget

Submit

### Personnel

Title

Hourly/Salary Rate/Sa

Approved Amount Balance Notes

### Fringe Benefits

### Personnel & Fringe Notes

No Notes from Affiliate

Select “Update Budget & Indirect Rate”



## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

## Personnel

Title

## Fringe Benefits

Update Amounts

Add Personnel

Add

Update Amounts

## Personnel &amp; Fringe Notes

Indirect Rate: 10.0

Apply Indirect Rate to Expenses: ☒

Mark Inactive

Delete

- If your tribe has an approved NICRA, please enter the rate in the “Indirect Rate” field.
- If your tribe does not have an approved NICRA, you may use the 10% de minimis rate.
- If choosing not to charge an indirect rate or de minimis to your budget, please enter 0.
- Enter the number only, do not enter the % sign.

The budget will default to the indirect rate being applied to both personnel/fringe as well as all of the other expenses in the budget (equipment, supplies, travel, etc.). If you would like to **only** apply this rate to the personnel/fringe costs, you must opt out and unclick the blue check box.

You will need to upload a copy of your NICRA with your budget. Details on how to do this will be provided a little later in the webinar.

## Differentiating between Direct and Indirect Costs

If you will be including an indirect rate in your budget, you cannot include items that are part of your indirect rate (such as rent, utilities, etc.) in your direct costs.

If you are **not** including an indirect rate or the de minimus in your budget, you may include a portion of these costs.

*However*, specific direct programming costs that may seem like an indirect cost, may be included in your budget if they are strictly used for direct programming.

**EXAMPLE:** Renting a space for two hours a week to host a victim's support group, this would be allowed as a direct cost.

# What should you consider in drafting your budget?

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## **Personnel**

- How many staff will be working on the project?
- Are they full-time or part-time?
- Hourly or salaried?
- Will they work 100% on the program or just dedicate a portion of their time?
- Will they be starting work on the program from the very start, or will there be a delay? (e.g., hiring process to fill position)

## **Fringe Benefits**


- What fringe benefits do you want to include in your budget, if any? Be sure to check with your payroll system to determine which payroll taxes you are required to pay, as these can be covered by the grant.





## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

Indirect Rate:   Apply Indirect Rate to Expenses: ☒

### Personnel

Mark Inactive

Delete

Title	Hourly/Salary	Rate/Salary	Total Hrs/Wk	Grant Hrs/Wk	Wks on Grant	% on Grant	Amount Allocated	Notes
-------	---------------	-------------	--------------	--------------	--------------	------------	------------------	-------

### Fringe Benefits

Update Amounts

### Add Personnel

Delete

Add

Update Amounts

To add a staff line item, click the “Add” button in the “Add Personnel” box.

### Personnel & Fringe Notes



## Fringe Benefits

1 Enter the employee title (not their name).  
This should be short but descriptive of their role  
with the program.  
Ex: Program Coordinator, Case Manager, etc.

Delete

	Title	Hourly/Salary	Rate/Annual Salary	Total Hrs/Wk	Grant Hrs/Wk	# Weeks on Grant	% Time on Grant	Amount Allocated to Grant	Notes
<input type="checkbox"/>	<input type="text"/>	<div>Salary ▾</div>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="91.14"/>			<input data-bbox="1825 685 1845 706" type="text" value="+"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Medical

FICA  %

Dental

Vision

Workers Comp  %

Other

Benefits Allocated to Grant

AddUpdate Amounts

2 Select whether the employee is hourly or salaried.

3 For **hourly** employees, enter their *hourly rate*.  
  
For **salary** employees, enter their *annual salary*.



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## Fringe Benefits

Update Amounts

## Add Personnel

Title	Hourly/Salary	Rate/Annual Salary	Total Hrs/Wk	Grant Hrs/Wk	# Weeks on Grant	% Time on Grant	Allocated to Grant	Notes
<input type="checkbox"/> <input type="text"/>	Salary ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="91.14"/>			+

☐ Medical

FICA  %

**Please Note:** Not all employees will be working on the program for the entire program period. Therefore, when adding an employee, the “# Weeks on Grant” should accurately reflect what is appropriate for each staff member.

Add

Update Amounts

The system will automatically calculate the amount allocated to the grant based on information entered in the payroll section and here.

**Please Note:** You are not required to include fringe benefits in your budget, you may leave any or all of these options blank.

1

On the top line of the fringe benefits, enter the **annual premium** for benefits paid as a set rate each month.

**Example: Employer** pays \$500 per month towards the Medical Insurance for this employee:  $\$500 \times 12 \text{ mos.} = \$6,000$  annual premium (enter 6,000 in the Medical box)

<input type="checkbox"/>	<input type="text"/>	Salary ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	91.14							
<input type="checkbox"/> Medical	<input type="text"/>	Dental	<input type="text"/>	Vision	<input type="text"/>	Short Term	<input type="text"/>	Long Term	<input type="text"/>	Life	<input type="text"/>	Other	<input type="text"/>
FICA	<input type="text"/> %	SUTA	<input type="text"/> %	Workers Comp	<input type="text"/> %	Retirement	<input type="text"/> %	Other	<input type="text"/> %	Benefits Allocated to Grant			

2

On the bottom line of fringe benefits, enter the percentage based fringe amount (e.g., FICA = 7.65)

Click "Update Amounts" to calculate totals.



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## Fringe Benefits

Update Amounts

## Add Personnel

Title



Medical

FICA

 %

SUTA

 %

Workers Comp

 %

Retirement

 %

Other

 %

% Time on  
Grant

Amount  
Allocated to  
Grant

Notes

+

Click on the + under Notes to add the narrative information for each staff member. These notes are for both the personnel and fringe benefits entries. Notes included for each line item should describe the work the employee will be doing related to the NCAI Fund Victim Services Micro-grant Program, any other relevant/clarifying information that may be needed, and necessary information related to fringe that is included in the budget.

**Please note:** If entering an amount for “Other” in the fringe benefits section, you need to provide information specifically identifying this fringe benefit here.

Supporting documentation verifying fringe rate(s) must be uploaded to the budget for percentage based fringe, with the exception of FICA. (ex: Worker’s Compensation, SUTA, etc.)



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## Fringe Benefits

Update Amounts

## Add Personnel

Title

Hourly/S



Salary



Medical

Dental

FICA

 %

SUTA

Add

Update Amounts

## Personnel & Fringe Notes

When adding notes, this is the pop up that will appear. Please enter the necessary narrative information and press “Save and Close” to close the screen and return to the budget entry page.

### Notes for

No Notes from National

Save and Close

Delete

Amount  
Allocated to  
Grant

Amount  
Allocated to  
Grant

Notes

±

Other

Benefits Allocated to Grant



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OVC Example Org 2

## Fringe benefits

Update Amounts

## Add Personnel

Delete



Do not leave any empty items in the Add box. The system will try to save it for you and it will show up as a line item with a random string of numbers and letters as its title in your budget.

Select these empty line items in the Add box and hit delete **before** saving or moving forward.

Title

Hourly/Salary

Rate/Annual  
Salary

Total Hrs/Wk

Grant Hrs/Wk

# Weeks on Grant

% Time on  
Grant

Amount  
Allocated to  
Grant

Notes



Medical

De

ong Term

Life

Other

FICA

SU

ther

Benefits Allocated to Grant

Add

Update Amounts



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Salary ▾

0

0

91.14



This notes section is utilized when submitting a request for a budget revision after your budget has been approved. Please leave this blank during the original budget submission.

Term

Life

Other

Benefits Allocated to Grant

Add

Update Amounts

### Personnel & Fringe Notes

### Reviewer Notes:

No Notes from National

Update Amounts

Save

Next

Total Personnel and Fringe Budget: \$ 0.00

Total Expense Budget: \$ 0.00

Total Budget Amount: \$ 0.00





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OVC Example Org 2



Salary ▾

0

0

91.14



? Medical

FICA

 %

1

Click here if you need to add another staff person to your budget and repeat the previous steps.

Short Term

Retirement

 %

Long Term

Other

 %

Life

Other

Benefits Allocated to Grant

Add

Update Amounts

2

Click "Update Amounts" at the bottom of the page to calculate the total Personnel and Fringe amount budgeted

Personnel

3

If you need to step away from entering your budget, you may press "Save" and come back to continue later.

Reviewer Notes:

No Notes from National

4

Once you have entered all of the necessary Personnel and Fringe Benefits expenses, press "Next" to move on to the Expenses section of the budget.

Update Amounts

Save

Next

Total Personnel and Fringe Budget: \$ 0.00

Total Expense Budget: \$ 0.00

Total Budget Amount: \$ 0.00



## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

Expenses		Indirect Rate: 10.0%	Procurement Threshold: 3,000
Equipment			
Item	Rate		
Travel			
Item	Rate		
Update Amounts			

If the Indirect Rate has been applied to expenses, the rate from the Personnel and Fringe Benefits page has defaulted to expenses in a read-only format.

Please enter the applicable threshold amount for micro-purchases based on your tribe's Procurement Policies and Procedures.

Add Expenses						Delete
Item	Category	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
Add Expense Add Mileage Update Amounts						

# Procurement Threshold

---

- The threshold for micro-purchases must match that outlined in the Tribal nation/organization's procurement policy.
- Micro-purchases are those for which no competitive solicitation is required if the price is considered reasonable.
- Based upon Uniform Guidance requirements, the micro-purchase threshold must be no greater than \$10,000.
- If your Tribal nation/organization's micro-purchase threshold is currently less than \$10,000, you can update the policy to match the federal requirement.
- FirstPic, Inc. can assist your Tribal nation/organization in updating your procurement policy if desired.

# Procurement Threshold (cont'd)

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- You must enter your Tribal nation's micro-purchase procurement threshold so that the system can identify when a more advanced procurement process is required.
- During the reimbursement request process, if a purchase is made that exceeds the indicated micro-purchase threshold the system will flag that additional paperwork must be submitted that outlines the procurement process followed.
- The NCAI Fund will make templates available to meet this requirement.
- We will provide more information on the procurement requirements during the Financial Online Reporting Training webinar.

# Procurement – Indian Preference

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- Federal law allows “Indian Preference” in the procurement process if:
  - Indian Preference is included in the written policies and procedures
  - Preference clauses are incorporated into contracts
  - Indian Preference is referenced in notices and advertisements
- Technical assistance providers can help create or adjust your procurement procedures to meet these requirements if needed. Please reach out to [microgrants@ncai.org](mailto:microgrants@ncai.org) to request this support.

# Tips to consider in drafting your budget

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- Will any local or out of the area travel be required? If you are purchasing a vehicle, consider gasoline needs once the vehicle has been acquired.
  - If staff will be using personal vehicles, they can be reimbursed at the federal rate of \$0.575/mile\* but must track mileage and purpose through a mileage log.
- \*This is the current rate for 2020, if this rate changes for 2021 and/or 2022, reimbursement amount will be based on the new rate for travel in those years as applicable.
- Consider any service contracts such as cell phone, internet, virtual platforms, etc. A portion of these can be paid by the grant if they are shared across other activities as well.
- Other costs include emergency needs for victims including clothing, transportation, toiletries, etc. Review the allowable costs document to find other expenses that could be considered.

# Equipment and Supplies Considerations

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- Think through all auxiliary equipment and supply needs such as locked cabinets for files and computers, computer software, etc.

## **Equipment Definition**

- The DOJ Grant Financial Guide (3.7 Property Standards, Equipment) defines equipment as tangible personal property (including information technology systems) having:
  - A useful life of more than 1 year
  - A per-unit acquisition cost of \$5,000 or greater (or greater than the organization's capitalization threshold, if it is less than \$5,000)

## **Supplies Definition**

- If the item does not meet the threshold outlined under “Equipment” above, enter it under the Supplies category.

# Procurement Contracts and Subawards

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Applicants will be allowed to use funds to engage in contracts and/or subawards that assist in achieving the goals of the proposed victim services activities. 2 C.F.R. 200 requires that determination of the nature of the relationship be made based upon the substance of the agreement rather than the form.

If your program will involve contracting or subawarding funds to an outside entity, please mention this to the technical assistance provider and provide appropriate information in your budget so that we can support you in ensuring an adequate procurement and monitoring procedure is planned in advance.





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OVC Example Org 2



## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

Indirect Rate: 10.0% Procurement Threshold:

### Expenses

Mark Inactive

Delete

### Equipment

Item	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
------	------	----------	---------------------------	------------------------------------	-------

### Travel

Item	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
------	------	----------	---------------------------	------------------------------------	-------

Update Amounts

### Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
------	----------	------	----------	---------------------------	------------------------------------	-------

Add Expense

Add Mileage

Update Amounts

This is the Expenses page. As with Personnel, you add items and include line item notes. To begin, click "Add Expense"



## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

Indirect Rate: 10.0% Procurement Threshold: 3,000

Mark Inactive

Delete

1

Enter the Item name.  
Please use a **short** general  
descriptive name here.  
Additional detailed  
information will be  
provided in the Notes.  
Ex: Vehicle; Office Lease;  
Program/Office Supplies;  
etc.

2

Select the Item type:

- Travel
- Equipment
- Supplies
- Sub-Awards (Sub-Grants)
- Procurement Contracts
- Consultant Travel
- Other Costs
- Indirect Costs

Add Expenses

Delete

Item

Category

Rate

Quantity

Amount Allocated to Grant Amount Allocated for Indirect Cost Notes

Other Costs

1.00

Add Expense

Add Mileage

Update Amounts



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OVC Example Org 2



## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

1

Enter the rate (\$) per unit. For entries such as "Program/Office Supplies" this will be a lump sum as opposed to a per item amount.

2

Enter the quantity to be purchased. In the case of a lump sum amount, this will be 1.

3

Add notes to explain the item(s) and how it will be used for/related to the program. In the case of a more general line item entry, examples of what you plan to purchase is also needed. Notes are required for all line items.

### Expenses

Update Amount

Indirect Rate: 0.0

Procurement Threshold:

Mark Inactive

Delete

### Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant Notes
<input type="checkbox"/>	Other Costs		1.00	<input data-bbox="1787 863 1864 949" type="text" value="+"/>

Add Expense

Add Mileage

Update Amounts

### Expense Notes



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OVC Exam

When adding notes, this is the pop up that will appear. Please enter any necessary notes and press “Save and Close” to close the screen and return to the budget entry page.

Notes for

No Notes from National

Save and Close



## Expenses

[Mark Inactive](#)[Delete](#)

Rate = Per Item or Lump Sum Fee

Quantity = Number of items

	Item	Rate	Quantity	Amount Allocated to Grant
<input type="checkbox"/>	Vehicle	10,000.00	1.00	\$10,000.00

## Procurement Contracts

	Item	Rate	Quantity	Amount Allocated to Grant
<input type="checkbox"/>	Contractor 1	250.00	5.00	\$1,250.00

## Supplies

	Item	Rate	Quantity	Amount Allocated to Grant
<input type="checkbox"/>	Office Supplies	750.00	1.00	\$750.00

Rate = Per Item or Lump Sum Fee

Quantity = Number of items

Rate = Per Hour or Per Session Fee

Quantity = Number of hours or sessions

Clarification for what each represents needs to be included in the notes.

Or this could also just be entered as a lump sum amount for the rate with a quantity of 1 if appropriate for this contractor.



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OVC Example Org 2



## Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant Notes
<input type="checkbox"/> Airfare	Travel ▼	500.00	1.00	\$500.00 +

Add Expense

Add Mileage

Update Amounts

Click “Add Expense”  
to add a new  
expense item.

“Add Mileage” is specifically for  
creating a line item to reimburse  
for travel by personal vehicle.

The current allowable GSA mileage  
rate is \$0.575/mile. This should be  
used as the mileage rate unless  
your Tribal nation/organization has  
a lower rate that is used. If this is  
the case, please include a comment  
about this in the notes.

### Reviewer Notes:

No Notes from National



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OVC Example Org 2

### Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant Notes
<input type="checkbox"/> Travel to Purchase Sup	Travel	500.00	1.00	\$500.00 +
<input type="checkbox"/> Mileage	Travel	.575	350	+

Add Expense

Travel via program vehicle – gas reimbursement

The general purpose of the travel needs to be included in the line item notes.

Travel via personal vehicle

The general purpose of the travel needs to be included in the line item notes. All travel by personal vehicle needs to be included in this one line item, with different purposes indicated in the notes if applicable.  
**Please Note:** If using a mileage rate lower than the GSA allowable rate, a comment must be included in the notes. You may not enter a rate higher than the GSA allowable rate.

### Expense Notes

#### Reviewer Notes:

No Notes from National



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OVC Example Org 2



## Supplies

Item

☐

Office Supplies

Amount Allocated to Grant

\$750.00

Notes

+

Update Amounts

Do not leave any empty items in the Add box. The system will try to save it for you and it will show up as an line item with a random string of numbers and letters as its title in your budget. Select these empty line items in the Add box and hit delete **before** saving or moving forward.

## Add Expenses

Delete

☒

Item

Category

Other Costs

Rate

Quantity

1.00

Amount Allocated to Grant Notes

+

Add Expense

Add Mileage

Update Amounts

## Expense Notes





## OVC EXAMPLE ORG 2 GRANT

TOTAL AMOUNT: \$75,000.00

1

For Sub-Awards and Procurement Contracts, \$25,000 is the maximum amount allowable to apply indirect costs. For your initial budget submission, the “Amount Allocated for Indirect Cost” field for line items in these categories will auto-populate based on the “Amount Allocated to Grant” total up to \$25,000 if you have included indirect costs or the de minimis rate in your budget.

2

The system will automatically populate the amount to be used to calculate indirect costs directly from the “Amount Allocated to Grant” field for line items in categories other than Sub-Awards (Sub-Grants) and Procurement Contracts once you click on “Update Amounts” if you have included indirect costs or the de minimis rate in your budget.

Amount Allocated to Grant  
\$30,000.00

Amount Allocated for Indirect Cost  
25,000

Amount Allocated to Grant  
\$750.00

Amount Allocated for Indirect Cost  
\$750.00

### Expenses

#### Equipment

Item

☐ Vehicle

#### Procurement Contracts

Item

☐ Contractor 1

Rate

30,000.00

Quantity

1.00

#### Supplies

Item

☐ Office Supplies

Update

#### Add Expenses

Item

Category

Rate

Quantity

Amount Allocated to Grant

Amount Allocated for Indirect Cost

Notes

Add Expense

Add Mileage

Update Amounts

Delete



Expenses

Mark Inactive Delete

Equipment

Item	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
<input type="checkbox"/> Vehicle	10,000.00	1.00	\$10,000.00	\$1,000.00	+

Procurement Contracts

Item	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
<input type="checkbox"/> Contractor 1	250.00	5.00	\$1,250.00		+

Supplies

Item	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
<input type="checkbox"/> Office Supplies	750.00	1.00	\$750.00	\$75.00	+

Update Amounts

After clicking "Update Amounts"  
the online reporting site organizes  
the items entered per category



## Add Expenses

[Delete](#)

Item	Category	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
------	----------	------	----------	---------------------------	------------------------------------	-------

[Add Expense](#)[Add Mileage](#)[Update Amount](#)

2

“Indirect Cost Approved” will be automatically updated based on indirect costs submitted and approved in reimbursement requests.

3

“Indirect Cost Remaining” is equal to “Indirect Cost Budgeted” minus “Indirect Cost Approved.”

1 The “Indirect Cost Budgeted” will automatically populate based on information entered in the budget.

Indirect Cost

Indirect Cost Budgeted  
\$1,075.00

Indirect Cost Approved  
\$0.00

Indirect Cost Remaining  
\$1,075.00



NCAI

OVC Example Org 2

Mileage

Travel

5/5

350

Add Expense

Add Mileage

Update Amounts

### Expense Notes

This notes section is utilized when submitting a request for a budget revision after your budget has been approved.  
No notes should be entered here during the original budget submission.

### Reviewer Notes:

No Notes from National

Notes from reviewers will appear here. These might include revisions needed if the budget is sent back for adjustment or corrections.  
During your original budget entry, this will be blank.

### Attachments

No Attachments Found



**NCAI**

OVC Example Org 2



☐ Mileage

Travel

.575

350

Add Expense

Add Mileage

Update Amounts

### Expense Notes

### Reviewer Notes:

No Notes from National

### Attachments

No Attachments Found

Upload Attachment

Click "Upload Attachment" to  
add a document to the budget.



## Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
------	----------	------	----------	---------------------------	------------------------------------	-------

Add Expense Add Mileage Update Amounts

## Expense Notes

Reviewer Notes:  
No Notes from National

## Indirect Cost

Indirect Cost Budgeted  
\$3,575.00

## Attachments

Name	Notes	Edit/Upload View Attachment(s)
SUTA		Test Upload.pdf

Upload Attachment

1

Select the type of document you are uploading: Workers Comp, SUTA, Pension, Verification Letter, NICRA, or Other.

The specific documents listed are the most common attachments needed here. Other is the catch all for any other document that may be needed

### Add New Document

SUTA  
Workers Comp  
SUTA  
Pension  
Verification Letter  
NICRA  
Other

Close

Save as

### Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Amount Allocated for Indirect Cost	Notes
------	----------	------	----------	---------------------------	------------------------------------	-------

[Add Expense](#) [Add Mileage](#) [Update Amounts](#)

### Expense Notes

**Reviewer Notes:**  
No Notes from National

### Indirect Cost

**Indirect Cost Budgeted**  
\$3,575.00

**Indirect Cost Remaining**  
\$3,575.00

#### Add New Document

SUTA  
Workers Comp  
SUTA  
Pension  
Verification Letter  
NICRA  
Other

Close

Save and Close

Upload New Attachment

2

Click "Upload New Attachment"

### Attachments

Name	Notes	Edit/Upload View Attachment(s)
------	-------	--------------------------------

 SUTA		 <a href="#">Test Upload.pdf</a>
--	--	---

[Upload Attachment](#)



NCAI

OVC Example Org 2

## Expense Notes

## Reviewer Notes:

No Notes from National

## Attachments

No Attachments Found

Upload Attachment

Previous

Update Amount

Review and Submit

### Add New Document

File Name:

Choose File No file chosen

File size is limited to 5MB. Please upload PDF's Only

Upload

Close

1

You may leave this blank.  
If you do choose to enter a name,  
please end the name with ".pdf"  
as some systems have challenges  
opening the file when renamed  
without this format label.

2

Click "Choose File" to  
select the file to  
upload. The file must  
be a pdf.

3

Once you have  
selected the file,  
make sure you  
click "Upload."

and Fringe Budget: \$ 0.00  
Total Expense Budget: \$ 12,500.00  
Total Budget Amount: \$ 12,500.00





NCAI

OVC Example Org 2

## Expense Notes

## Reviewer Notes:

No Notes from National

## Attachments

No Attachments Found

Upload Attachment

## Add New Document

Attachment uploaded successfully. Click "Choose File" to upload another attachment, or "Close" if you are finished.

File Name:

Choose File

No file chose

File size is limited to 5mb. Please uplo

Upload

Close

When you are done, click "Close."

Previous

Update Am

Review and Submit

nd Fringe Budget: \$ 0.00

Total Expense Budget: \$ 12,500.00

Total Budget Amount: \$ 12,500.00



Reviewer Notes:  
No Notes from National

If you need to delete an attachment (e.g., uploaded the incorrect document), please contact the finance team member at FirstPic you are working for assistance or email [support@firstpic.org](mailto:support@firstpic.org).

Indirect Cost

Indirect Cost Budgeted  
\$1,075.00

Indirect Cost Approved  
\$0.00

Indirect Cost Remaining  
\$1,075.00

To view an uploaded file, click on the link for the document under “View Attachment(s).”

Attachments

Name	Notes
 SUTA	

Edit/Upload View Attachment(s)  
 Test Upload.pdf

Upload Attachment



**Reviewer Notes:**  
No Notes from National

Indirect Cost

Indirect Cost Budgeted  
\$1,075.00

Indirect Cost Remaining  
\$1,075.00

Attachments

Name	Upload View Attachment(s)
SUTA	Test Upload.pdf

Upload Attachment

Previous Update Amounts Save **Review and Submit**

Total Personnel and Fringe Budget: \$ 0.00  
Total Expense Budget: \$ 12,000.00  
Total Budget Amount: \$ 13,075.00

When you are done, hit “Review and Submit.”  
This will take you to a screen where you can review what you have created before final submission.



## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

Organization: OVC Example Org 2 Date Range: 10/1/2020 - 6/30/2022 Duration: 638.00 Status: Incomplete  
Total Budgeted: \$0.00 Requested Amount: \$0.00 Approved Amount: \$0.00 Balance: \$0.00  
Indirect Rate: 10.0% Procurement Threshold: \$0

Update Budget

NOTE: This budget has not yet been submitted. Please review and click submit.

Submit

### Attachments

These numbers need not match exactly; however, they should be relatively close.

Name

SUTA



Test Upload.pdf

Upload Attachment

### General Notes from National

#### Reviewer Notes:

No Notes from National

View Reimbursements

Update Budget

Submit

Total Budgeted Amount: \$ 0.00

There may be in-kind donations, as well as other leveraged funding used in order to implement the T.R.A.I.L. program.

## Attachments

Name	Notes	Edit/Upload View Attachment(s)
------	-------	--------------------------------

SUTA		
------	--	--

Upload Attachment

General Notes from National

Reviewer Notes:

No Notes from National

If you discover you need to make changes before submitting, scroll to the bottom of the review page and click on “Update Budget.” This will take you to the beginning of the process and you will just click through until you get to whatever it is you need to adjust.

View Reimbursements

Update Budget

Submit

Total Budgeted Amount: \$ 0.00

There may be in-kind donations, as well as other leveraged funding used in order to implement the T.R.A.I.L. program.



NCAI

OVC Example Org 2



## OVC EXAMPLE ORG 2 GRANT

TOTAL AWARDED: \$75,000.00

**Organization:** OVC Example  
Org 2

**Date Range:** 10/1/2020 -  
6/30/2022

**Duration:** 638.00

**Status:** Incomplete

**Total Budgeted:** \$0.00

**Requested Amount:** \$0.00

**Approved Amount:** \$0.00

**Balance:** \$0.00

**Indirect Rate:** 0.0%

**Procurement Threshold:**

Update Budget

NOTE: This budget has not yet been submitted. Please review

Once you have everything entered the way you want, you must hit this submit button to complete the process and submit your budget for review.

Submit

### Personnel

Title	Hourly/Salary Rate/Salary	Grant Hrs/Wk	Wks on Grant	% on Grant	Amount Allocated	Requested Amount	Approved Amount	Balance	Notes
Staff 1	<input checked="" type="checkbox"/> Salary	0.00	91.14	0.00%		\$0.00	\$0.00	\$0.00	

# Training and Technical Assistance Webinars 2020

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## Post-Award

- **October 7, 2020**, Financial Online Reporting webinar

Registration Link:

<https://attendee.gotowebinar.com/register/6268198551300495887>

This webinar will include:

- Step-by-step instructions for submitting a reimbursement request in the online reporting site;
  - Required schedule for submission of requests;
  - Required documentation needed when submitting a request;
  - Reimbursement request review process;
  - Helpful tips for submitting a successful reimbursement request.
- 
- **November** - Program Reporting webinar – exact date TBD

# Questions?

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1. Use the questions box on your control panel to submit questions and responses.
2. 'Raise' your hand by clicking the hand icon to signal to be unmuted.



# Contact Info

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- Robin Paterson, FirstPic, Inc. [rpaterson@firstpic.org](mailto:rpaterson@firstpic.org)
- Virginia Davis, National Congress of American Indians, [vdavis@ncai.org](mailto:vdavis@ncai.org)
- Lonna Hunter, Tribal Law & Policy Institute, [lonna@tlpi.org](mailto:lonna@tlpi.org)
- Esther Labrado, National Congress of American Indians, [elabrado@ncai.org](mailto:elabrado@ncai.org)

