

Budget Form and Budget Narrative Instructions

Prior to preparing the Budget Form and Budget Narrative templates, you should be familiar with the information in the Request for Proposals document under Section III-C (pages 3-4) for the Policy on Indirect Costs and Section IV-D (pages 8-9) Budget and Budget Narrative.

To use the Budget Form in Excel, you will need to enable macro functionality. If this is already done, just open the file. If not, follow these steps:

- You will see the following message "Security Warning: Macros have been disabled" below the Toolbar Menus.
- Click "Enable content".

**IT IS IMPORTANT TO FOLLOW THESE STEPS IN NUMERIC ORDER
TO ALLOW THE AUTO FEATURES TO FULLY FUNCTION.**

Step 1: Go to the Main Menu tab and click on "Go to Budget Form (Master)" to input your baseline budget into the light blue colored cells in the Budget Form (Master). This will become the first year of funding ("Year 1") after completing Step 5. The form is protected to auto calculate.

Step 2: Go to the Budget Narrative (Master), you will see that all budget information has been auto-populated in the narrative. There are three buttons on the top right-hand side. Ignore these until you have completed entering all narrative information. Input narrative information on the light blue colored areas under the rows where the information from the Budget Form is present. After pressing "Enter", you will notice that the row is not sizing itself to the height of the narrative length. This is corrected by going back to the cell where you have entered the information and click the "Adjust Row Height for the Current Cell" button. If you do not want to adjust the row height after every cell entry or an edit, click the "Adjust Row Height for All Narrative" button. The following message appears "This will adjust the row height of all narrative fields, but it will take between 3-5 minutes. Excel will notify you when it is done updating". When it is done, it prompts the following message "Row Height Adjustments Completed".

Step 3: After you have completed all line items necessary for your narrative, click the "Hide Non-Populated Narrative" button. Most budgets do not use all of the fields in the Budget Form. The form will automatically hide any fields that are empty, so only the fields with financial information and the corresponding narrative are present.

Step 4: Once the Budget Form (Master) and Budget Narrative (Master) are complete, click the "Return to Main Menu" button.

Step 5: Select the number of years of funding requested. The form will make copies for each year. You can then go into the individual budgets and change the dollar amounts, if needed, and the narratives will be automatically updated. **DO NOT insert or delete rows.** The budgets and narratives for each year are only linked to the corresponding year (i.e., edits for "Year 1" will only appear on the "Year 1" narrative).

Step 6: The title for each year, will automatically correspond to the tab year ("ATTACHMENT E1" for "Year 1", "ATTACHMENT E2" for "Year 2"). You must input the fiscal year (e.g. 07/01/2026-06/30/2027) on the Budget Forms for each subsequent year. The following prompt: "**ENTER NEW FISCAL DATES HERE*" will appear in the Fiscal Year field. Update the fiscal year using this format MM/DD/YYYY. Once the date range is entered, the Budget Narrative will update accordingly.

Step 7: Select Page Layout and adjust the page breaks. Print the Budgets and Narratives for all years of requested funding.