

Budgeting in ePlan Competitive Grant Applications

Overview

In competitive funding applications, allocation amounts are not known until the grant competition is complete, applications are reviewed, and final allocation amounts are determined. Since ePlan requires an allocation and budget to accept a funding application submission, prospective grantees are awarded a temporary \$0.01 allocation to create a budget and submit the funding application.

Additionally, as part of the grant competition, reviewers must see the proposed grant budget to approve the application.

To submit the initial application, applicants must have a **budget item of \$0.01** on the ePlan [Budget](#) page and a **proposed budget file** uploaded to the [Related Documents](#) page.

When final allocations are made, successful applicants will revise their funding application and upload the *Proposed Budget* file to the [Budget](#) page to create the approved application budget.

Original Submission

The table below provides a quick overview of the two different methods to create competitive funding application budgets.

Method	Overview of Next Steps
I prefer to use a spreadsheet.	<ul style="list-style-type: none"> Download the blank <i>Budget</i> file from the ePlan Budget page. Add Budget items in a spreadsheet program. Upload the <i>Proposed Budget</i> file to the Related Documents page. Create a \$0.01 budget item on the ePlan Budget page to allow the application to be submitted. When all other pages in the application are complete, submit the application.
I prefer to use the ePlan Budget page.	<ul style="list-style-type: none"> Complete the proposed budget on the ePlan Budget page. Download the <i>Proposed Budget</i> file. Upload the <i>Proposed Budget</i> file to the Related Documents page. Delete all budget items on the ePlan Budget page. Create a new \$0.01 budget item on the ePlan Budget page to allow the application to be submitted. When all other pages in the application are complete, submit the application.

Budget Item Creation Option 1: Edit or Create the Budget Items inside ePlan

To manually enter each budget line item on the application *Budget* page:

- For each budget line that the organization plans to use, click the **Modify** link located to the left of the account number to open the *Budget Detail* page for that item.

Action	Account Number	Total
Modify	73300 - Community Services	\$0.00
Modify	99100 - Transfers Out	\$0.00

- On the *Budget Detail* page for the item, click **Add Budget Detail**.

Add Budget Detail	<< First < Previous Next > Last >> Items 0-0 out of 0	Items/Page: 10	
Delete	Edit	Budget Detail	Narrative Description
		Total for filtered Budget Details: \$0.00	

Create Budget Detail

Indirect Cost	
Total Contributing to Indirect Cost	\$0.00
Indirect Cost Rate	4.39%
Maximum Allowed for Indirect Cost	\$0.00

Budget Detail	Narrative Description
Account Number: 73300 - Community Services	
Line Item Number: 105 - Supervisor / Director	
Optional Program Code:	
Location Code: EXAMPLE LEA (999)	
Quantity: 1.00	
Cost: \$0.00	
Budget Detail Total: \$0.00	

- On the *Create Budget Detail* page:
 - The Account Number is pre-selected from the previous screen.
 - Select the appropriate Line Item Number from the dropdown menu.
 - Enter the Quantity and Cost for the Budget detail. The quantity is most commonly 1.00.
 - ePlan auto-calculates the Line Item total as Quantity multiplied by Cost.
 - Add a narrative description for each entry.

Add Budget Detail		<< First < Previous 1 Next > Last >> Items 1-1 out of 1				Items/Page: 10	
Delete	Edit	Budget Detail				Narrative Description	
		Account Number:	73300 - Community Services			Example Budget Item	
		Line Item Number:	105 - Supervisor / Director				
		Optional Program Code:					
		Location Code:	EXAMPLE LEA (999)				
		Quantity:	1.00				
		Cost:	\$0.01				
		Line Item Total:	\$0.01				

- To **edit** existing Budget Details, click the pencil icon. To **delete** an existing Budget Detail, click the trash can icon.
- Click **Return** to navigate back to the *Budget* page.

Budget Item Creation Option 2: Download the Budget File

From the *Budget* page, click the **Download Budget Data** file link. The *Budget Template* file contains four sheets. Users may copy and paste information from the reference sheets into the *Budget Data* worksheet.

- Budget Data:** This worksheet contains the column headings and any budget detail information currently in the grant. On this sheet, users can create, update, or delete budget detail information.
- Available Budget Cells:** This reference sheet contains the list of allowable object/function combinations for the grant. Copy from this sheet to add Account and Line Item Numbers.
- Available Budget Tags:** This reference sheet lists the available Budget Tags for the grant. Copy from this sheet to add Budget tags.
- Available Organizations:** This reference sheet contains the list of organizational codes (i.e., LEA and school codes) for the grant. Copy from this sheet to add Organization codes and names.

	A	B	C	D	E	F	G
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags
1	6100526	Update	71200	Special Education Program	189	Other Salaries Wages	
2	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers	
3		Create	71200	Special Education Program	201	Social Security	

	A	B	C	D
	Account Number	Account Number Description	Line Item Number	Line Item Number Description
1	71200	Special Education Program	189	Other Salaries Wages
2	71200	Special Education Program	195	Certified Substitute Teachers

	A	B	C	D	E	F
	Tag Group Name	Tag Group Load Name	Tag Name	Tag Load Name	Upload Text	
1	Use of Funds	UOF	Mental Health Supports	MHSFS	UOF=MHSFS	
2	Use of Funds	UOF	Parent and Family Engagement	PFE	UOF=PFE	

	A	B	C	D	E	F	G	H
	Organization Code	Organization						
1	999	EXAMPLE LEA (999)						
2	999-0001	ABC Elementary (999-0001)						

Update, Create, or Delete Items in the Budget Data Worksheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
1	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
2	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
3		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

A. Item Key (Required Column—Do Not Delete this column)

- The item key is generated by ePlan to identify the budget item. Do not change this value when updating or deleting an existing budget item.
- To add a new budget detail, leave this cell blank. ePlan assigns an item key when the file is uploaded.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
1															
2	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
3	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
4		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

B. Action (Required Column—Do Not Delete)

- This identifies the action that ePlan makes to the budget detail row. Each cell must contain: Update, Delete, or Create.
- The default value for existing budget details is **Update**. A row marked update overwrites the budget detail in ePlan with the details in the Excel file.
- To delete an existing budget detail, change the value in this column to **Delete**. **Note:** Removing the line from the Excel document does not delete the line from the budget in ePlan.
- To add a new budget detail, change the value in this column to **Create**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
1															
2	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
3	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
4		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

➤ Copy this information from the Available Budget Cells sheet

C. Account Number (Required Column—Do Not Delete)

- This column reflects the Account Number for each budget detail row and must reflect a number that appears in the "Account Number" column of the Available Budget Cells sheet.
- Change the Account Number for an existing budget detail by changing the number in this column.
- Users must include a value in this column for each new addition to the budget.

D. Account Number Description (Optional Column)

- This column is a reference only. It is not necessary to include this column in the budget upload file.
- For ease of use, users may include the description for new budget detail rows by copying the Account Number Description for the selected account number from the Available Budget Cells sheet.

E. Line Item Number (Required Column—Do Not Delete)

- This column reflects the Line Item Number of each budget detail. It must reflect a number from the Line Item Number column of the Available Budget Cells sheet for the selected Account Number.
- If the Account Number column was changed, the user must also change the value in this column to be the accurate Line Item Number for the selected account number.
- Users must include the accurate Line Item Number for the selected account number for each new addition to the budget.

F. Line Number Description (Optional Column)

- This column is a reference only. It is not necessary to include this column in the budget upload file.
- For ease of use, users may include the description for new budget detail rows by copying the Account Number Description for the selected account number from the Available Budget Cells sheet.

Note: The Object Code, Object Code Description, Function Code, and Function Code Description can be copied and pasted to the appropriate location in the Budget Data sheet at the same time.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
1															
2	6100526	Update	71200	Special Education Program	189	Other Salaries Wages	LUOF=PEE		999	EXAMPLE LEA	1	5000	5000	Example Narrative	
3	6100527	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
4		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

➤ Copy this information from the Available Budget Tags sheet

G. Budget Tags (Required Column—Do Not Delete)

- Copy and paste the *Upload Text* for each budget tag from the *Available Budget Tags* sheet.
- Include all budget tags in the same cell. If there are multiple tags, separate the tags by a (:) (colon)
- If adding more than one tag in a single tag group, users can either:
 - Copy and paste the *Upload Text* for each tag (e.g., A=ELS: A=HQIM: A=IA: A=CE)
 - (optional, where multiple budget tags are allowed) Use one Tag Group code and separate the tag codes by a comma (e.g., A=ELS, SP, IA, CE)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
2	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
3	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
4		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

H. Optional Program Code: (optional column)

- Disregard the optional program code for this application

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
2	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
3	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
4		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

➡ Copy this information from the *Available Organizations* sheet

I. Organization Code (Required Column—Do Not Delete)

- Each budget item must have a value in this column that identifies the organization (LEA or school) that will be served by the budget item. The value must match the *Organization Code* in the exact format as listed on the *Available Organizations* sheet. **Note:** Any organization codes beginning with 0 must be formatted as text, or the leading 0 will be deleted in the upload and create an error. Copying from the *Available Organizations* tab will ensure that the format is correct.

J. Organization (Optional Column)

- This column is a reference only. It is not necessary to include this column in the budget upload file.
- For ease of use, Users may include the description for new budget detail rows by copying the Organization with the *Organization Code* from the *Available Organizations* sheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
2	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
3	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
4		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

K. Quantity (Required Column—Do Not Delete)

- Users must enter a value greater than zero (0) in this column in every budget detail row.
- Values in this column can be entered up to two decimal places.
- The value in this column will multiply the cost to produce the total dollar amount for the budget detail.

L. Cost (Required Column—Do Not Delete)

- Users must enter a value greater than zero (0) in this column in every budget detail row.
- Values in this column can be entered up to two decimal places.
- The total dollar amount for the budget detail is calculated by multiplying the value in the cost column by the value in the quantity column. **No dollar sign (\$) is required; Enter the amount as e.g.: "100.00".**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
1	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
2	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
3		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

M. Total (Required Column—Do Not Delete)

- This column is a system-generated field that multiplies the cost and the quantity. The data for an existing budget detail is displayed here for information purposes only. ePlan ignores any information entered in the Total column.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
1	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
2	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
3		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

N. Narrative Description (Required Column—Do Not Delete)

- Enter a Narrative Description of the Budget Line into this column
- Users must enter a narrative description explaining how the funds will be spent. Each narrative has a 2000-character limit
- Press Alt+Enter (Windows) or Ctrl+Option+Enter (Mac) to create line breaks in the text.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
1	6100526	Update	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
2	6100526	Delete	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
3		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

O. Last Updated Date (Required Column—Do Not Delete)



This information is provided for existing budget items. No user input is required.

Upload the Proposed Budget Template as a Related Document:

- When the Proposed Budget file is final, navigate to the Related Documents page and click the **Upload New** link for the **Grant Application Budget** document. Select the completed budget file, then click the **Create** button.

Delete all Budget Items on the Budget page:

After the Proposed Budget file is uploaded to the Related Documents page, return to the Budget page, and delete all budget items using the trash can icon.

Add Budget Detail		<< First < Previous 1 Next > Last >> Items 1-1 out of 1				Items/Page: 10	
Delete	Edit	Budget Detail				Narrative Description	
		Account Number:	73300 - Community Services			Example Budget Item	
		Line Item Number:	105 - Supervisor / Director				

Add a \$0.01 Budget Item to match the temporary submission allocation:

Add a \$0.01 Budget Item to match the temporary submission allocation by clicking **Modify** on any Account Number, then **Add Budget Detail**. Enter a Budget Quantity of "1", and a Cost of "\$0.01", then click **Create**. If all other pages of the application are complete, the application can be moved to the next workflow status for review on the [Sections](#) page.

Budget Detail	Narrative Description
Account Number: 73300 - Community Services ▼	
Line Item Number: 105 - Supervisor / Director ▼	
Optional Program Code: <input type="text"/>	
Location Code: EXAMPLE LEA (999) ▼	
Quantity: <input type="text" value="1.00"/>	
Cost: <input type="text" value="\$0.01"/>	
Budget Detail Total: <input type="text" value="\$0.01"/>	

Application Revision

After the grant competition is complete, successful applicants will be awarded an allocation to be budgeted in the funding application.


Applicants can load the *Proposed Budget* template to the *Budget* page to avoid needing to recreate budget items one at a time on the *Budget* page. Follow the steps below to complete the budget for the revised application.

Delete the \$0.01 Temporary Allocation Budget Item:

Navigate to the *Budget* page. Click **Modify** for the Account Number where the \$0.01 temporary budget item was budgeted. Click the trash can icon to delete the budget item.

Download the Proposed Budget File:

Navigate to the *Related Documents* page. Click the **Grant Application Budget** document link to download the *Proposed Budget* file.

Required Documents		
Type	Document Template	Document/Link
(21st CCLC/LEAPS) Grant Application Budget [Upload at least 1 document(s)]	N/A	Upload New [Update] [Delete]  (21st CCLC/LEAPS) Grant Application Budget

Update the Proposed Budget File:

Open the *Proposed Budget* file in a spreadsheet application (e.g., Microsoft Excel, Google Sheets). Remove all values in Column A: Item Key. Change all cells in Column B: Action to Create. This tells ePlan to create new budget items with the information in the rest of the row. Save the file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Item Key	Action	Account Number	Account Number Description	Line Item Number	Line Item Number Description	Budget Tags	Optional Program Code	Organization Code	Organization	Quantity	Cost	Total	Narrative Description	Last Updated Date
1		Create	71200	Special Education Program	189	Other Salaries Wages			999	EXAMPLE LEA	1	5000	5000	Example Narrative	
2		Create	71200	Special Education Program	195	Certified Substitute Teachers			999	EXAMPLE LEA	1	4000	4000	Example Narrative	
3		Create	71200	Special Education Program	201	Social Security			999	EXAMPLE LEA	1	2500	2500	Example Narrative	

Note: Users may make any other necessary budget updates in the spreadsheet during this step. Updates may include new items, updated costs, changed details for existing items, etc. Before the Revised Application can be submitted, the total cost of all budget items must equal the final allocation. These edits can be made in the spreadsheet before being uploaded to the *Budget* page or may be made on the *Budget* page after the proposed budget is uploaded.

Upload the Proposed Budget File to the Budget Page:

- On the application *Budget* page, Click the **Upload Budget Data** link.

Upload Budget Data Download Budget Data		
Action	Account Number	Total
Modify	73300 - Community Services	\$0.00
Modify	99100 - Transfers Out	\$0.00
Total		\$0.00
Adjusted Allocation		\$0.00
Remaining		\$0.00

- On the *Create Grant Budget Upload* page, click the **Select** button to open the file browser. Select the Updated Budget file and click **Open**. Click **Create** to upload the file.

- If one or more cells in a required column are empty in the upload file, ePlan generates an error message indicating which rows are missing data. Correct the discrepancy in the spreadsheet file and then click the **Select** button to select and upload the corrected file.

Row 2 is missing data.
Row 3 is missing data.

Please select a file to upload.

Upload Data File:

After the user uploads the file, ePlan displays the *Grant Budget Upload* screen.

- Click **View Messages** to check for validation errors in the file. Errors prevent the file from processing.
- If necessary, resolve any errors in the spreadsheet, save the file, then click **Upload Data File** to upload a new file – replacing the current upload.

From this page, users can also:

- Click **View Data File** to download and view the current *Budget* file, or
- Click **Delete Grant Budget Upload** to delete the new *Budget* file without making the file changes.

Grant Budget Upload

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[Process Grant Budget Upload](#)

[Delete Grant Budget Upload](#)

Grant Budget Upload Functions	Description
View Messages	View any issues with the upload file.
Preview Changes	View the changes that will be made once the file has been processed.
Upload Data File	Upload a new file to replace the current one.
View Data File	View the current file.

- At the top of the page, click the **Process Grant Budget Upload** link to finalize the upload and make the file changes to the application's budget.

Note: An existing budget upload must be processed before another upload can be started. The [Budget](#) page will display a [View Budget Upload](#) link if a budget file has been uploaded but not processed. Users can click **Delete Grant Budget Upload** to delete the upload without processing it. No changes will be made to the budget in ePlan.

Other Tips for Using the Budget Template:

- Users may rearrange columns in the template, but the text of the column heading must remain **exactly as it was downloaded**.
- Do not delete columns marked in this guide as required.
- Additional columns may be added after column N. These columns are ignored by ePlan in the upload process. For example, users may add columns for reference notes to the file. The data in the additional columns will not affect the budget detail in the upload process.
- Required columns **cannot** have blank cells in a budget detail row.

- Rows for budget details that have no changes can be hidden or deleted from the budget template file if desired. ePlan does not make any changes to the budget from rows marked with the Update action if there were no changes in the row.
- While an entire budget can be uploaded at once, it is also possible to upload only one or a group of budget details.
- To provide a user with a blank upload file, download the budget file before any budget details are created in ePlan or download the budget file, then delete all the rows except the top row containing column headings. LEAs may use this function to provide an empty spreadsheet to individual schools to allow the school to create the school-specific budget, which LEAs may then upload into the application.

Ensure that the entire Allocation is budgeted

Once the *Updated Budget* file has been loaded to the *Budget* page, ensure that the entire allocation is budgeted by ensuring that the remaining cell in the bottom right corner of the *Budget* table is \$0.00. Add or update Budget Items as needed to budget the entire allocation.

Action	Account Number	Total
Modify	73300 - Community Services	\$50,000.00
Modify	99100 - Transfers Out	\$0.00
	Total	\$50,000.00
	Adjusted Allocation	\$50,000.00
	Remaining	\$0.00