

## HOW TO ENTER A BUDGET AT AWARD IN THE AWARDS MODULE

The SRS grant administrator will provide you with the award # and child.

Go to Common Tasks, then click on the search function in the Awards module.

Type in the Kualu award ID number and search. (ex. \*13624\*)

Click Open on the line where the award appears.

Click the Budget Versions tab at the top.

Click the [open] button in the Budget Versions area on the screen.

The screenshot displays the 'Kualu Research' interface. At the top, a message states 'Document was successfully reloaded.' Below this, there are tabs for 'time & money', 'expand all', and 'collapse all'. The main content area is divided into sections: 'Budget Overview (012486-00007:9999990)' with a 'hide' button, and 'Budget Versions (012486-00007:9999990)' with a 'hide' button. The 'Budget Overview' section contains a table with the following data:

Account ID:	9999990	Budget Start Date:	10/01/2019
Award ID:	012486-00007	Budget End Date:	09/30/2024
Budget Version Number:	2	Budget Total Cost Limit:	2,941,000.70
Award Budget Type:	New	Budget Change Total Cost Limit:	2,941,000.70
Award Budget Status:	Submitted	Unrecovered F & A Rate Type:	AWARD RATES
On/Off Campus:	Default	F&A Rate Type:	AWARD RATES
Description:	New		
Comments:			

Below the 'Budget Overview' is the 'Budget Versions' section, which includes a table with the following data:

Version #	Direct Cost	F & A	Total	Budget Status	Award Budget Type	Actions
2	2,673,637.00	267,363.70	2,941,000.70	Submitted	New	open

Below the table, there are fields for 'Award Version' (1), 'F&A Rate Type' (AWARD RATES), 'Cost Sharing' (0.00), 'Last Updated' (Jul 1, 2021, 3:53:43 PM), 'Unrecovered F&A' (0.00), and 'Last Updated By' (rossco). There is also a 'Comments' field and a 'Show All Budgets' checkbox.

At the bottom, there is a 'Budget Limits (012486-00007:9999990)' section with a 'show' button.

If a special indirect rate is used for this award, you will be asked the following question: Click yes.

Award rates have been added or modified since the time the budget was created. Rates will be updated and the budget will be recalculated. Do you want to proceed?

When the budget opens, ON THE PARAMETERS TAB, the SRS research grant administrator will have set the total amount of the award. If not, then you'll need to contact SRS again to clarify.

Kuali Research

Award Budget Document

Doc Nbr: 624110 Status: In Progress  
Initiator: M04074728 Created: 06/32 PM 07/01/2021  
Budget Name: Version #: 1

Budget Versions Parameters Rates Summary Personnel Non-Personnel Distribution & Income Budget Actions

[Return to award](#)  
\* required field

Budget Overview [hide](#)

Budget Overview

Account ID: 9999990 Obligation Start Date: 07/01/2021  
Award ID: 013697-00002 Obligation End Date: 06/30/2023

Budget Version Number: 1

Award Budget Type: New

Award Budget Status: In Progress Unrecovered F & A Rate Type: MTDC

On/Off Campus: Default F&A Rate Type: MTDC

Description: New

Comments:

Budget Totals:

Obligated Previous:	0.00
Obligated Change:	199,980.00
Obligated Total:	199,980.00

Budget Periods & Totals [hide](#)

**YOU WILL NOT BE ABLE TO SYNC TO THE AWARD LIMIT IF THE COST LIMIT IS NOT SET IN THE BUDGET PERIODS LOWER ON THIS SCREEN. SRS research grant admins will not set the project period cost limits.**

You cannot sync to Personnel costs, only Non-Personnel costs.

You need to set the limit for each project year. Click SAVE after typing in the total awarded dollars.

Kuali Research

Document was successfully reloaded.

[Return to award](#)  
\* required field

Budget Overview [hide](#)

Budget Overview

Account ID: 9999990 Obligation Start Date: 07/01/2021  
Award ID: 013697-00002 Obligation End Date: 06/30/2023

Budget Version Number: 1

Award Budget Type: New

Award Budget Status: Submitted Unrecovered F & A Rate Type: MTDC

On/Off Campus: All On F&A Rate Type: MTDC

Description: New

Comments:

Budget Totals:

Obligated Previous:	0.00
Obligated Change:	199,980.00
Obligated Total:	199,980.00

Budget Periods & Totals [hide](#)

Budget Periods

	Period Start Date	Period End Date	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
1	07/01/2021	06/30/2022	99,800.00	65,581.70	34,218.30	0.00	0.00	99,800.00	0.00	
2	07/01/2022	06/30/2023	100,180.00	68,387.49	31,792.51	0.00	0.00	100,180.00	0.00	
<b>Totals</b>										
Budget Change:	07/01/2021	06/30/2023	199,980.00	133,969.19	66,010.81	0.00	0.00			
Previous Budget:			0.00	0.00	0.00	0.00	0.00			

Then click on the Personnel or Non-Personnel tab to begin entering your budget information.

Make sure you check the Budget Period in which you are working. You can click the down arrow and then Update View to change the budget period in which you are working.

Kuali Research

Award Budget Document

Doc Nbr: 624110    Status: In Progress  
 Initiator: M04074728    Created: 06:32 PM 07/01/2021  
 Budget Name:    Version #: 1

Budget Versions   Parameters   Rates   Summary   Personnel   Non-Personnel   Distribution & Income   Budget Actions

return to award   expand all   collapse all  
 \* required field

Select Budget Period:    Budget Period: 1: 07/01/2021 - 06/30/2022    View: Full Detail

update view

Project Personnel (All Periods)    hide

Changes made in the Project Personnel panel must be saved before the corresponding results are reflected in the Personnel Details panel.

Project Personnel (All Periods)

Person	Job Code:	Appointment Type:	* Base Salary:	* Salary Effective Date:	Salary Anniversary Date:	Actions
Employee Search Add: Non-employee Search To be named	049680	UC Academic	86,489.04	07/01/2021		delete
1 Cedrick A.K. Kwulmy (PIV>Contact) Asst Professor - Educator						

sync personnel

Budget Overview (Period 1)    show

In the Add Details area, click the down arrow and highlight "Summary".

Research Dashboard - Document

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Kuali Research

Project Personnel (All Periods)    hide

Changes made in the Project Personnel panel must be saved before the corresponding results are reflected in the Personnel Details panel.

Project Personnel (All Periods)

Person	Job Code:	Appointment Type:	* Base Salary:	* Salary Effective Date:	Salary Anniversary Date:	Actions
Employee Search Add: Non-employee Search To be named	049680	UC Academic	86,489.04	07/01/2021		delete
1 Cedrick A.K. Kwulmy (PIV>Contact) Asst Professor - Educator						

sync personnel

Budget Overview (Period 1)    show

Personnel Detail (Period 1)    hide

Add Details

* Person	* Object Code Name	Group	Action
select select Cedrick A.K. Kwulmy (049680) Summary	select	select --or-- (new group)	add

calculate current period   view personnel salaries   save   reload   close   copy

In the Object Code Name box, click the down arrow and select the appropriate fringe rate. Click Add.

**Kuali Research**

Project Personnel (All Periods) hide

Changes made in the Project Personnel panel must be saved before the corresponding results are reflected in the Personnel Details panel.

**Project Personnel (All Periods)**

Person	Job Code:	Appointment Type:	* Base Salary:	* Salary Effective Date:	Salary Anniversary Date:	Actions
Employee Search						
<b>Add:</b> Non-employee Search						
To be named						
1 Cedrick A.K. Kwulmy (PI/Contact)	049680 Asst Professor - Educator			7/01/2021		

**Budget Overview (Period 1)**

**Personnel Detail (Period 1)**

**Add Details**

* Person	* Object Code Name	Group	Action
select	select	select --or-- (new group)	

**calculate current period** **view personnel salaries** **save** **reload** **close** **copy**

Type in the dollar amount for the salary line you just added, then click Calculate. Then click Save.

Then repeat this step to add more personnel types by clicking the down arrow in the Person box, then selecting the correct fringe rate, adding the line, typing in the dollars for that expense category, clicking Calculate, then clicking Save.

Research Dashboard - Document x +

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**Kuali Research**

**Personnel Detail (Period 1)** hide

**Add Details**

* Person	* Object Code Name	Group	Action
select	select	select --or-- (new group)	

**hide** FACTFED Faculty FT - Fed Fringe Rates

Person	* Start Date	* End Date	% Effort	% Charged	Period Type	Requested Salary	Calculated Fringe	Action
Summary	07/01/2021	06/30/2022				8,834.00	2,447.02	

FACTFED Faculty FT - Fed Fringe Rates Details

**hide** STUGSFED Grad Student - Fed Fringe Rates

Person	* Start Date	* End Date	% Effort	% Charged	Period Type	Requested Salary	Calculated Fringe	Action
Summary	07/01/2021	06/30/2022				24,336.00	1,752.19	

STUGSFED Grad Student - Fed Fringe Rates Details

**calculate current period** **view personnel salaries** **save** **reload** **close** **copy**

Once you are done with Period 1, click the down arrow in Budget Period box to select the next period, then click Update View button to move to the next period.

Kuali Research

Award Budget Document

Doc Nbr: 624110 Status: In Progress  
 Initiator: M04074728 Created: 06:32 PM 07/01/2021  
 Budget Name: Version #: 1

Budget Versions Parameters Rates Summary Personnel Non-Personnel Distribution & Income Budget Actions

return to award expand all collapse all  
 \* required field

Select Budget Period:

Budget Period: 1: 07/01/2021 - 06/30/2022 View: Full Detail  
 1: 07/01/2021 - 06/30/2022  
 2: 07/01/2022 - 06/30/2023

Project Personnel (All Periods) hide

Changes made in the Project Personnel panel must be saved before the corresponding results are reflected in the Personnel Details panel.

Project Personnel (All Periods)

Person	Job Code:	Appointment Type:	* Base Salary:	* Salary Effective Date:	Salary Anniversary Date:	Actions
Employee Search Add: Non-employee Search To be named						
1 Cedrick A.K. Kwulmy (PI/Contact) Asst Professor - Educator	049680	UC Academic	86,489.04	07/01/2021		delete

sync personnel

Budget Overview (Period 1) show

Repeat the steps to add the summary budget line for each personnel type on your budget. Click SAVE before moving to the Non-Personnel tab.

### Personnel Cost Share

Go to the line for the person being cost shared.

Then open the details for that line and enter the cost share amount in the box. Repeat as needed for each person type.

hide FACTFED Faculty FT - Fed Fringe Rates

Person	* Start Date	* End Date	% Effort	% Charged	Period Type	Requested Salary	Calculated Fringe	Action
Summary	06/01/2021	05/30/2022				74,798.39		calculate delete

hide FACTFED Faculty FT - Fed Fringe Rates Details

Budget Category: Senior Personnel # of Person(s): 0

Unrecovered F&A: 0.00 Cost Sharing: 0.00

Apply inflation?  On Campus Flag

Submit Cost Sharing?

Budget Justification Notes: Group Description:

Click the Non-Personnel tab at the top.

Select the correct period. Then click the Show button in the area where you need to add budget details.

Kuali Research

return to award expand all collapse all \* required field

Select Budget Period: Budget Period: 1: 07/01/2021 - 06/30/2022 View: Full Detail update view

Budget Overview (Period 1) hide

Budget Overview (Period 1)

Period 1 Start Date	07/01/2021	Budget Amount	0.00
Period 1 End Date	06/30/2022	Obligated Amount	0.00
Direct Cost	37,369.21		
F&A Cost	23,168.91	Unrecovered F&A	0.00
Total Sponsor Cost	60,538.12	Cost Sharing	0.00

Equipment show

Travel show

Participant Support show

Other Direct show

Non specified personnel show

calculate current period save reload close copy

Click the down arrow in the Object Code Name box to pick the correct expense category.

Research Dashboard - Document x +

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Kuali Research

Budget Overview (Period 1) hide

Budget Overview (Period 1)

Period 1 Start Date	07/01/2021	Budget Amount	0.00
Period 1 End Date	06/30/2022	Obligated Amount	0.00
Direct Cost	37,369.21		
F&A Cost	23,168.91	Unrecovered F&A	0.00
Total Sponsor Cost	60,538.12	Cost Sharing	0.00

Equipment show

Travel show

Travel

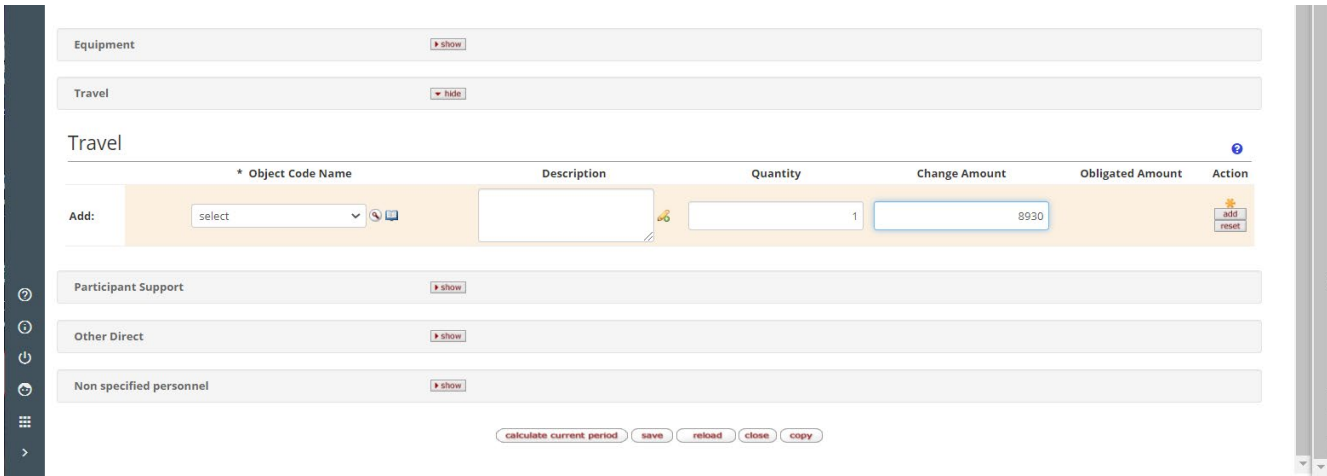
* Object Code Name	Description	Quantity	Change Amount	Obligated Amount	Action
Add: select			0.00		add
select					
530500 Travel - domestic					
530505 Travel - Foreign					

Participant Support show

Other Direct show

Non specified personnel show

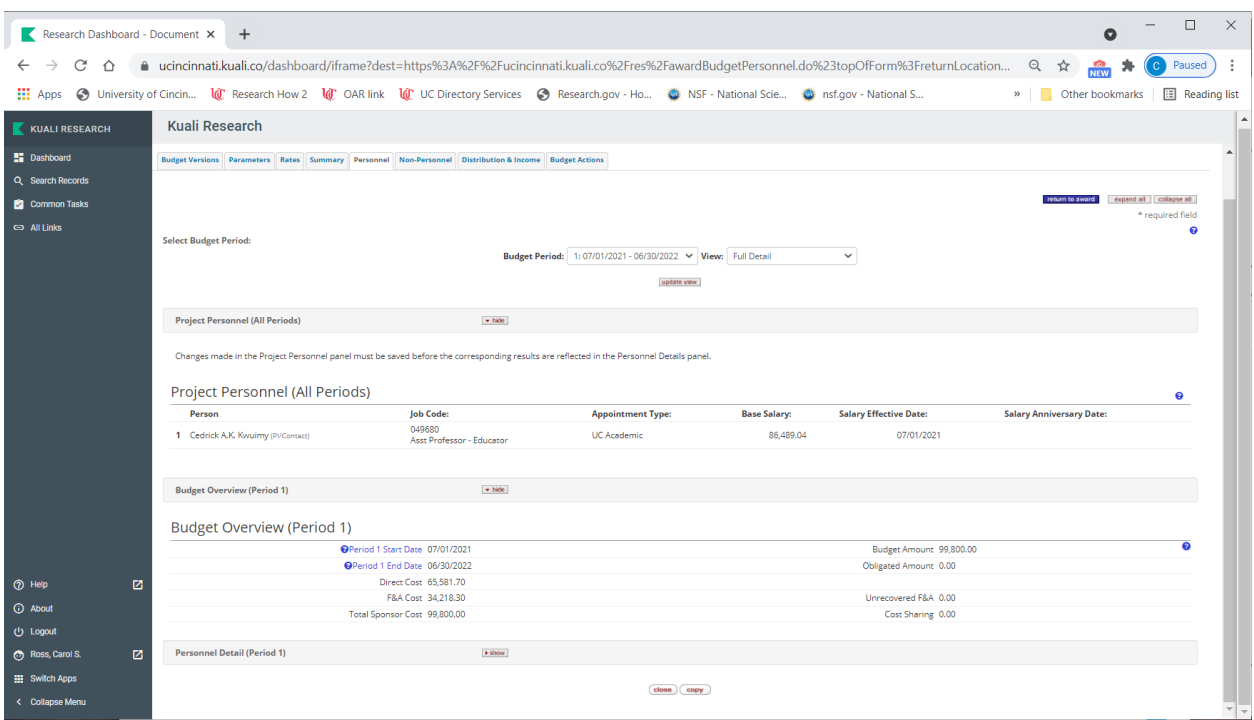
calculate current period save reload close copy



You will add the appropriate expense categories and SAVE for each year of the project.

**BE SURE TO SAVE BEFORE MOVING AWAY FROM THE TAB AND PERIOD YOU ARE ON.**

You can check the total for the period by expanding the Budget Overview Section to see how your entries are affecting the total budget calculation. OR you can go to the SUMMARY tab.



To SYNC, you need to select one of your Non-Personnel expense items: Expand the item's area on the budget, and click the SHOW button. Then expand the line item details section within that expense type.

At the bottom of the expanded section, you will have the opportunity to Sync to Period Costs Limit.

Other Direct

* Object Code Name	Description	Quantity	Change Amount	Obligated Amount	Action
Add: <input type="text" value="select"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>		<input type="button" value="add"/>
1 530400 Workshops 530400	<input type="text"/>	<input type="text"/>	<input type="text" value="2,000.00"/>	0.00	<input type="button" value="delete"/>
<b>Total Amount for 530400 Workshops:</b>				2,000.00	

Line Item Details

* Start Date	<input type="text" value="06/01/2021"/>	Unrecovered F&A	<input type="text" value="0.00"/>
* End Date	<input type="text" value="05/30/2022"/>	Cost Sharing	<input type="text" value="0.00"/>
Apply Inflation?	Yes	On Campus Flag	<input checked="" type="checkbox"/>
Budget Category	<input type="text" value="Meeting Costs"/>	Submit Cost Sharing?	<input type="checkbox"/>
Budget Justification Notes	<input type="text"/>		

Rate Classes

### Non-Personnel Cost Share

Open the line item details for the object code you are adding the cost share to.

Then add the amount to be cost shared to the box and click save.

Other Direct

* Object Code Name	Description	Quantity	Change Amount	Obligated Amount	Action
Add: <input type="text" value="select"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>		<input type="button" value="add"/>
1 530400 Workshops 530400	<input type="text"/>	<input type="text"/>	<input type="text" value="2,000.00"/>	0.00	<input type="button" value="delete"/>
<b>Total Amount for 530400 Workshops:</b>				2,000.00	

Line Item Details

* Start Date	<input type="text" value="06/01/2021"/>	Unrecovered F&A	<input type="text" value="0.00"/>
* End Date	<input type="text" value="05/30/2022"/>	Cost Sharing	<input type="text" value="0.00"/>
Apply Inflation?	Yes	On Campus Flag	<input checked="" type="checkbox"/>
Budget Category	<input type="text" value="Meeting Costs"/>	Submit Cost Sharing?	<input type="checkbox"/>
Budget Justification Notes	<input type="text"/>		

Rate Classes

If you have additional cost share for unrecovered F&A due to a reduced F&A rate, you can add a summary budget line to the non-personnel section for \$0. (500000 summary budget)

Then open the details for that line and add the additional cost share there.

### Cost Share Distribution

Distribution and Income Tab-Enter either a department name or account number for where the cost share is being covered for each line listed.







The F&A is included in the total listed.

If you need to split the cost share between multiple departments, you can add additional lines as needed.

Make sure that the unallocated is \$0



Cost Sharing Distribution List

	Project Period	Percentage	Source Account	Amount	Unit Name	Unit	Action
Add:	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	(select)  	<input type="text"/>	<input type="button" value="add"/>
1	<input type="text" value="1"/>	<input type="text" value="0.00"/>	<input type="text" value="Aerospace"/>	<input type="text" value="200.00"/>	(select)  	<input type="text"/>	<input type="button" value="delete"/>
2	<input type="text" value="1"/>	<input type="text" value="0.00"/>	<input type="text" value="Electrical"/>	<input type="text" value="123.75"/>	(select)  	<input type="text"/>	<input type="button" value="delete"/>
				<b>Total Allocated:</b>	\$323.75		
				<b>Unallocated:</b>	\$0.00		
<b>Cost Sharing Summary</b>					<b>Period 1: 06/01/2021 - 05/30/2022:</b>		\$323.75
					<b>Total Cost Sharing:</b>		\$323.75

**When the budget is complete, go the Budget Actions tab and click Submit which returns the budget the SRS research administrator.**

**If your total is \$2 off or less, you can also go to the SUMMARY tab, change the dollars in the F&A category and save to get to the final total awarded.**

**If the difference is more than \$2, you need to make the changes in the individual project periods.**

**Do NOT override the fringe benefit amount on the summary tab.**