HOW TO ENTER A BUDGET AT AWARD IN THE AWARDS MODULE

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

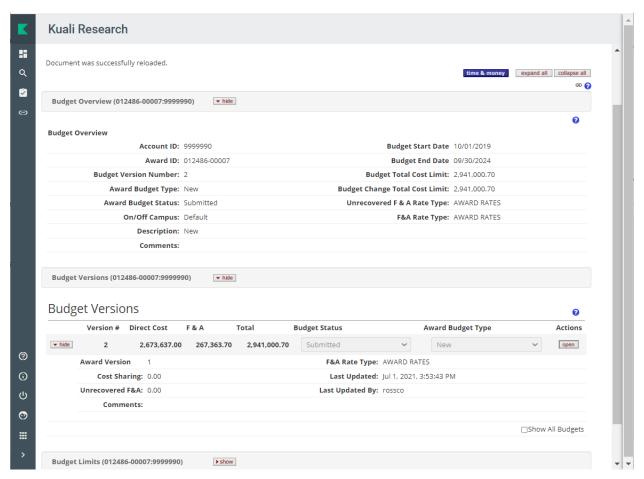
Go to Common Tasks, then click on the search function in the Awards module.

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

Click Open on the line where the award appears.

Click the Budget Versions tab at the top.

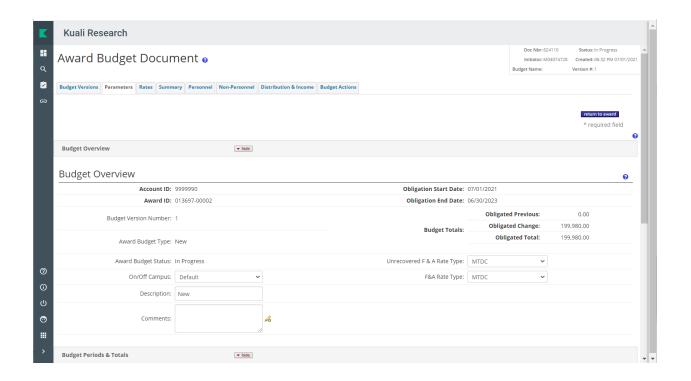
Click the [open] button in the Budget Versions area on the screen.



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?

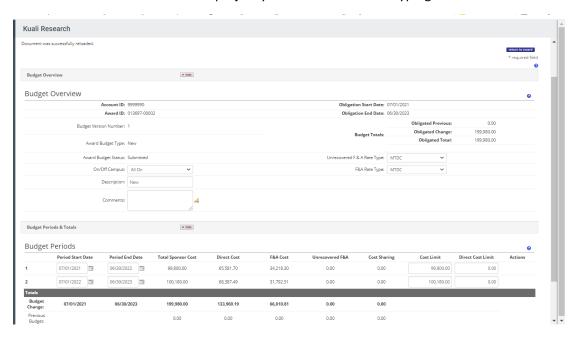
When the budget opens, ON THE PARAMETERS TAB, the SRS research grant administrator will have set the total amount of the award. If not, then you'll need to contact SRS again to clarify.



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.

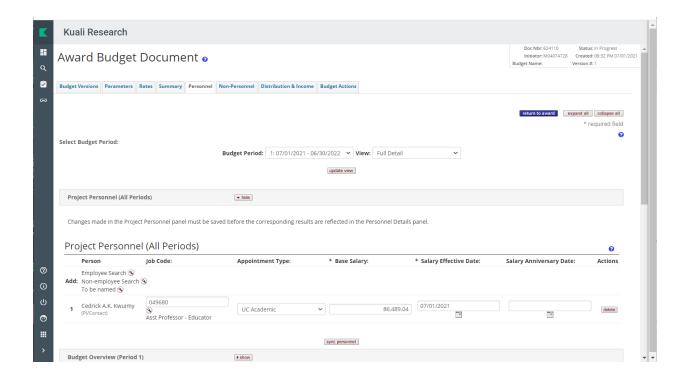
You cannot sync to Personnel costs, only Non-Personnel costs.

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

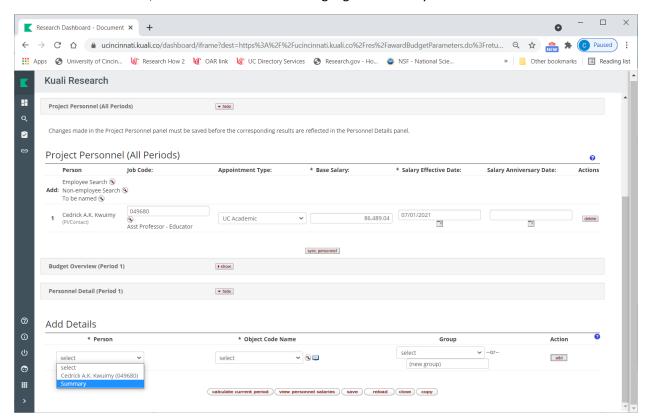


Then click on the Personnel or Non-Personnel tab to begin entering your budget information.

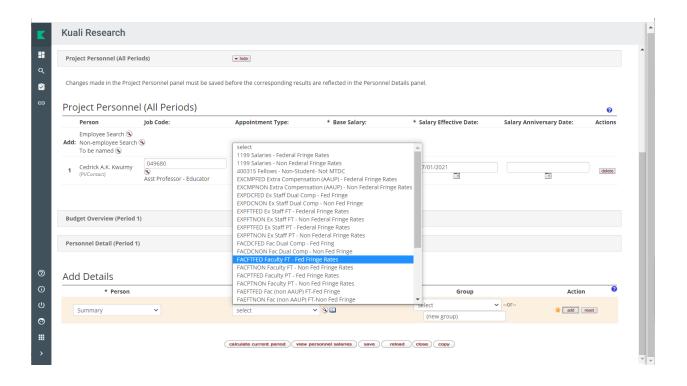
Make sure you check the Budget Period in which you are working. You can click the down arrow and then Update View to change the budget period in which you are working.



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

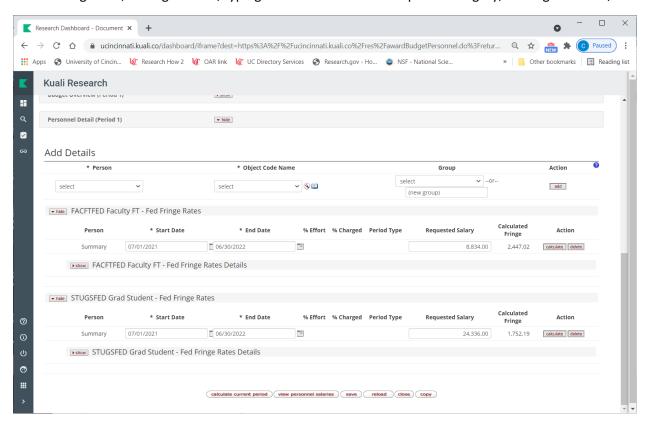


In the Object Code Name box, click the down arrow and select the appropriate fringe rate. Click Add.

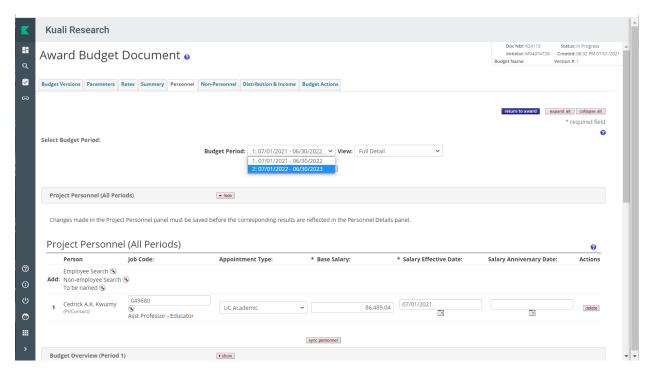


Type in the dollar amount for the salary line you just added, then click Calculate. Then click Save.

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.



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.

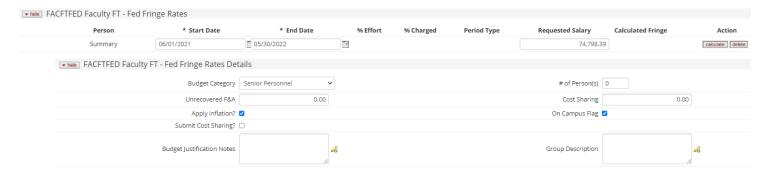


Repeat the steps to add the summary budget line for each personnel type on your budget. Click SAVE before moving to the Non-Personnel tab.

Personnel Cost Share

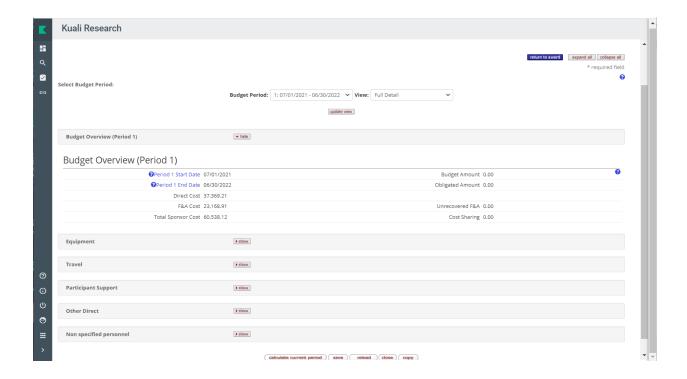
Go to the line for the person being cost shared.

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

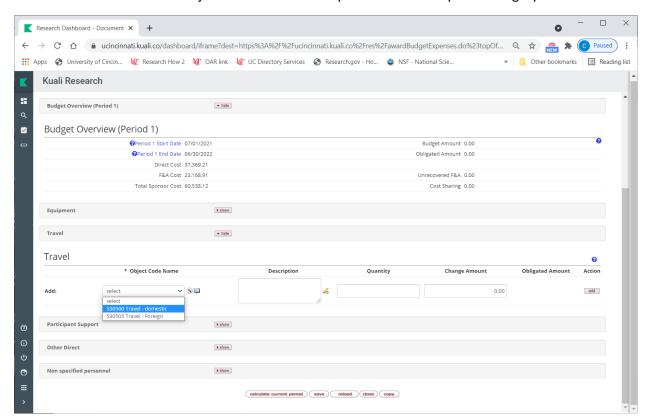


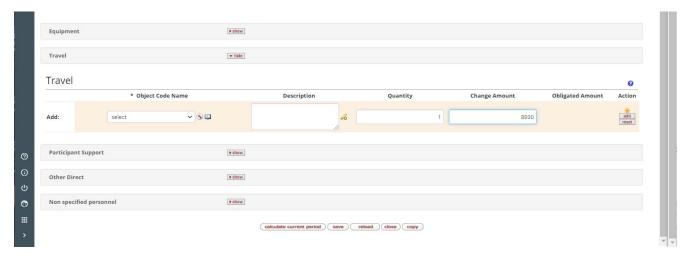
Click the Non-Personnel tab at the top.

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



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

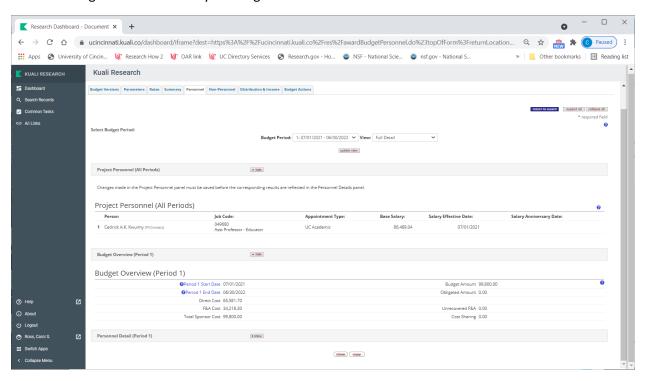




You will add the appropriate expense categories and SAVE for each year of the project.

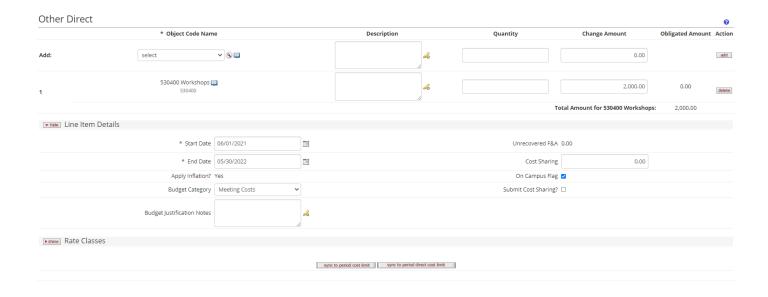
BE SURE TO SAVE BEFORE MOVING AWAY FROM THE TAB AND PERIOD YOU ARE ON.

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.

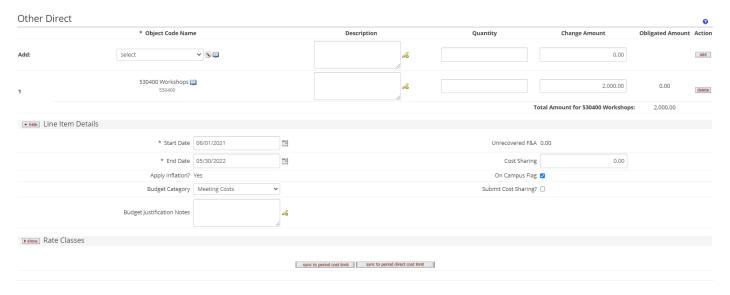
At the bottom of the expanded section, you will have the opportunity to Sync to Period Costs Limit.



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.



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.

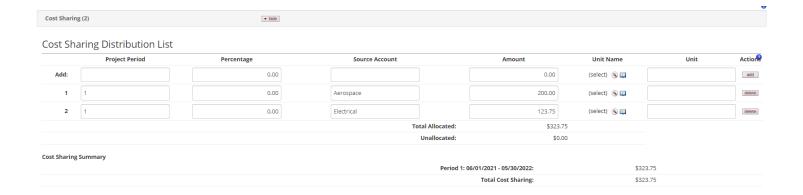
Cost Share Distribution

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



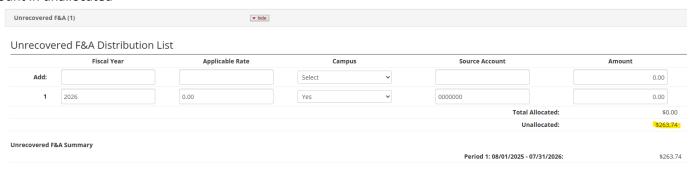
Unrecovered F&A

Distribution and Income Tab-Open the Unrecovered F&A section.

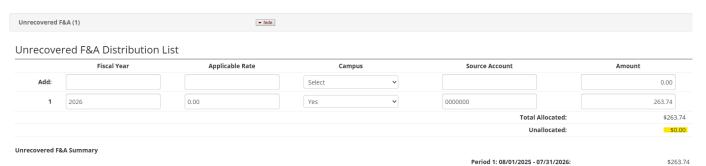
Enter "xxxx" in the Source Account column for each line.

Check that the unallocated amount is zero. If not, then add the amount listed to one of the lines to make sure that the unallocated is \$0

Ex. amount in unallocated



Ex. \$0 in unallocated



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.