

## 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.

The screenshot displays the Kuali Research interface. At the top, a message states "Document was successfully reloaded." Below this, the "Budget Overview (012486-00007:9999990)" section is visible, featuring a "hide" button. The "Budget Overview" details include:

- 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 overview, the "Budget Versions (012486-00007:9999990)" section is shown with a "hide" button. The "Budget Versions" table lists 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, the "Award Version 1" details are listed:

- 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
- Last Updated By: rossco
- Comments:

At the bottom of the interface, the "Budget Limits (012486-00007:9999990)" section is visible with a "show" button. A checkbox labeled "Show All Budgets" is also present.

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: MO4074728

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

Account ID: 9999990

Obligation Start Date: 07/01/2021

Award ID: 013697-00002

Obligation End Date: 06/30/2023

Budget Version Number: 1

Obligated Previous: 0.00

Award Budget Type: New

Budget Totals: Obligated Change: 199,980.00

Obligated Total: 199,980.00

Award Budget Status: In Progress

Unrecovered F & A Rate Type: MTDC

On/Off Campus: Default

F&A Rate Type: MTDC

Description: New

Comments:

Budget Periods & Totals

**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

Account ID: 9999990

Obligation Start Date: 07/01/2021

Award ID: 013697-00002

Obligation End Date: 06/30/2023

Budget Version Number: 1

Obligated Previous: 0.00

Award Budget Type: New

Budget Totals: Obligated Change: 199,980.00

Obligated Total: 199,980.00

Award Budget Status: Submitted

Unrecovered F & A Rate Type: MTDC

On/Off Campus: All On

F&A Rate Type: MTDC

Description: New

Comments:

Budget Periods & Totals

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						
1 Cedrick A.K. Kwulmy (PI/Contact) Asst Professor - Educator	049680	UC Academic	86,489.04	07/01/2021		<a href="#">delete</a>

[sync personnel](#)

**Budget Overview (Period 1)** [show](#)

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

**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						
1 Cedrick A.K. Kwulmy (PI/Contact) Asst Professor - Educator	049680	UC Academic	86,489.04	07/01/2021		<a href="#">delete</a>

[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) <b>Summary</b>	select	select (new group)	<a href="#">add</a>

[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						
Add: 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
Summary			

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.

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**Kuali Research**

Budget Overview (Period 1) hide

Personnel Detail (Period 1) hide

### Add Details

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

hide FACFTED 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	calculate delete

show FACFTED 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	calculate delete

show 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  
Initiator: MQ4074728  
Budget Name:

Status: In Progress  
Created: 06/32 PM 07/01/2021  
Version #: 1

Budget VersionsParametersRatesSummaryPersonnelNon-PersonnelDistribution & IncomeBudget Actions

return to awardexpand allcollapse all

\* required field

Select Budget Period:

Budget Period: 1: 07/01/2021 - 06/30/20222: 07/01/2022 - 06/30/2023View: Full Detail

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)

PersonJob Code:Appointment Type:\* Base Salary:\* Salary Effective Date:Salary Anniversary Date:Actions

Employee Search

Add: Non-employee Search  
To be named

1Cedrick A.K. Kwulmy (PI/Contact)049680Asst Professor - EducatorUC Academic86,489.0407/01/2021delete

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: 0.00Cost Sharing: 0.00

Apply inflation? ☒Submit Cost Sharing? ☐On Campus Flag ☒

Budget Justification NotesGroup 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 +

ucincinnati.kuali.co/dashboard/iframe?dest=https%3A%2F%2Fucincinnati.kuali.co%2Fres%2FawardBudgetExpenses.do%23topOf...

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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 hide

**Travel**

* Object Code Name	Description	Quantity	Change Amount	Obligated Amount	Action
Add: select select 530500 Travel - domestic 530505 Travel - Foreign			0.00		add
Participant Support					show
Other Direct					show
Non specified personnel					show

calculate current period save reload close copy

Equipment

show

Travel

hide

Travel

* Object Code Name	Description	Quantity	Change Amount	Obligated Amount	Action
Add: <div>select</div>		1	8930		<div>add</div> <div>reset</div>

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.

Research Dashboard - Document

ucincinnati.kuali.co/dashboard/iframe?dest=https%3A%2F%2Fucincinnati.kuali.co%2Fres%2FawardBudgetPersonnel.do%23topOfForm%3FreturnLocation...

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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:
1 Cedrick A.K. Kinsimiy (PI/Contact)	049680 Asst Professor - Educator	UC Academic	86,489.04	07/01/2021	

Budget Overview (Period 1)

hide

Budget Overview (Period 1)

Period 1 Start Date: 07/01/2021	Budget Amount: 99,800.00
Period 1 End Date: 06/30/2022	Obligated Amount: 0.00
Direct Cost: 65,581.70	
F&A Cost: 34,218.30	Unrecovered F&A: 0.00
Total Sponsor Cost: 99,800.00	Cost Sharing: 0.00

Personnel Detail (Period 1)

show

close

copy

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"/>	<input type="text" value="0.00"/>	<input type="button" value="delete"/>
					Total Amount for 530400 Workshops:	2,000.00
<input type="button" value="hide"/> 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"/>				
<input type="button" value="show"/> Rate Classes						
<input type="button" value="sync to period cost limit"/> <input type="button" value="sync to period direct cost 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.

## 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"/>	<input type="text" value="0.00"/>	<input type="button" value="delete"/>
					Total Amount for 530400 Workshops:	2,000.00
<input type="button" value="hide"/> 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"/>				
<input type="button" value="show"/> Rate Classes						
<input type="button" value="sync to period cost limit"/> <input type="button" value="sync to period direct cost limit"/>						

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 (2) hide

### 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"/>
Total Allocated:				\$323.75			
Unallocated:				\$0.00			

Cost Sharing Summary

Period 1: 06/01/2021 - 05/30/2022:	\$323.75
Total Cost Sharing:	\$323.75

## 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

Unrecovered F&A (1) hide

### Unrecovered F&A Distribution List

	Fiscal Year	Applicable Rate	Campus	Source Account	Amount
Add:	<input type="text"/>	<input type="text"/>	Select 	<input type="text"/>	<input type="text" value="0.00"/>
1	<input type="text" value="2026"/>	<input type="text" value="0.00"/>	Yes 	<input type="text" value="0000000"/>	<input type="text" value="0.00"/>
Total Allocated:					\$0.00
Unallocated:					\$263.74



Unrecovered F&A Summary

Period 1: 08/01/2025 - 07/31/2026:	\$263.74
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Ex. \$0 in unallocated

Unrecovered F&A (1) hide

### Unrecovered F&A Distribution List

	Fiscal Year	Applicable Rate	Campus	Source Account	Amount
Add:	<input type="text"/>	<input type="text"/>	Select 	<input type="text"/>	<input type="text" value="0.00"/>
1	<input type="text" value="2026"/>	<input type="text" value="0.00"/>	Yes 	<input type="text" value="0000000"/>	<input type="text" value="263.74"/>
Total Allocated:					\$263.74
Unallocated:					\$0.00

Unrecovered F&A Summary

Period 1: 08/01/2025 - 07/31/2026:	\$263.74
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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.