Creating a "high-level" budget in Kuali Research
KR Summary Budget method

A "high-level" budget has annual direct and indirect (F&A) costs for a proposal with little to no budget detail. In certain situations, you may enter a high-level budget in Kuali Research which shows annual direct and indirect costs, and no detail. You have the option to enter a high-level budget:

- If you are entering budget detail in a sponsor submission system such as Workspace, ASSIST, Fastlane
- If you are creating an NIH modular budget
- If you are creating a clinical trial budget on a separate spreadsheet
- For some other non-Federal sponsor submissions, with SPA approval

There are two methods for entering a high-level budget in KR for non-S2S proposals: the KR Summary Budget method and the Non-personnel Budget Entry method.

- You <u>must</u> use the *Non-personnel Budget Entry method* for NIH Modular budgets.
- You <u>must</u> use the *Non-personnel Budget Entry method* if the F&A rate cost basis is MTDC (Modified Total Direct Costs) <u>and</u> there are ANY excluded costs (equipment, subaward, etc.).
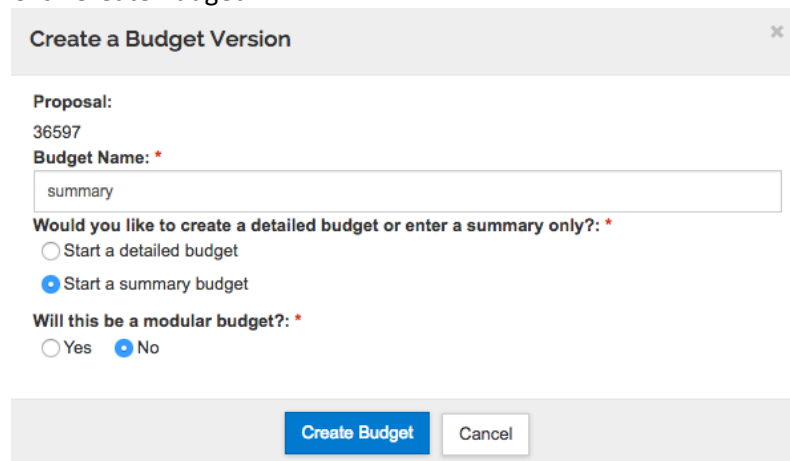
KR Summary Budget

Click +Add Budget
Enter a Budget Name
Select "Start a summary budget"
Click "No" for "Will this be a modular budget?"
Click Create Budget

Create a Budget Version   ✕

Proposal:
36597
Budget Name: *

summary

Would you like to create a detailed budget or enter a summary only?: *
○ Start a detailed budget
● Start a summary budget
Will this be a modular budget?: *
○ Yes   ● No

Create Budget   Cancel

KR will bring up the Periods & Totals screen.

This screen provides the budget periods and allows the user to manually enter direct and indirect costs.

Budget #1: summary

Proposal #36597 > Budget #1

Marked For Submission: No
Created: 06/08/2018
Proposal: #36597
more...

Data Validation (off) · Budget Settings · Hierarchy · Summary · Budget Versions · Autocalculate Periods · Help

Periods & Totals

Recalculate with changes · Reset to period defaults

+ Add Budget Period

« Return to proposal
- Periods & Totals
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- Institutional Commitments
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- Modular
- Budget Notes
- Budget Summary

Period Start Date *	Period End Date *	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
10/01/2018	09/30/2019	12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	🗑
10/01/2019	09/30/2020	12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	🗑
10/01/2020	09/30/2021	12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	🗑
		Total: 36.00	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	

If the budget periods need to be adjusted (as for a clinical trial), the dates may be manually adjusted here.

Enter data. KR does not perform any calculations when you manually enter data on this screen. You must use the applicable rate to calculate the F&A outside of KR and manually enter the amount.

Periods & Totals

Recalculate with changes · Reset to period defaults

+ Add Budget Period

Period Start Date *	Period End Date *	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
10/01/2018	09/30/2019	12.0		100,000.00	30,000.00	0.00	0.00	0.00	0.00	🗑
10/01/2019	09/30/2020	12.0		150,000.00	45,000.00	0.00	0.00	0.00	0.00	🗑
10/01/2020	03/31/2021	12.0		75,000.00	0.00	0.00	0.00	0.00	0.00	🗑
		Total: 36.00	Total: 0.00	Total: 325,000.00	Total: 75,000.00	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	

Click the "Recalculate with Changes" button, and the system will complete the "Total Sponsor Cost" column.

Periods & Totals

+ Add Budget Period

Period Start Date *	Period End Date *	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
10/01/2018	09/30/2019	12.0	130,000.00	100,000.00	30,000.00	0.00	0.00	0.00	0.00	🗑
10/01/2019	09/30/2020	12.0	195,000.00	150,000.00	45,000.00	0.00	0.00	0.00	0.00	🗑
10/01/2020	03/31/2021	6.0	97,500.00	75,000.00	22,500.00	0.00	0.00	0.00	0.00	🗑
		Total: 30.00	Total: 422,500.00	Total: 325,000.00	Total: 97,500.00	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	

Click "Save and Continue". The Budget Summary screen appears.

At the bottom of the Budget Summary screen, click "Complete Budget".

Budget Summary

	P1 (10/01/2018 - 09/30/2019)	P2 (10/01/2019 - 09/30/2020)	P3 (10/01/2020 - 03/31/2021)	Totals
Non-personnel				
Calculated Direct Costs	$0.00	$0.00	$0.00	$0.00
Non-personnel Subtotal	$0.00	$0.00	$0.00	$0.00
Totals				
Total Direct Cost	$100,000.00	$150,000.00	$75,000.00	$325,000.00
Total F&A Costs	$30,000.00	$45,000.00	$22,500.00	$97,500.00
Totals Subtotal	$130,000.00	$195,000.00	$97,500.00	$422,500.00

Back   Save   Complete Budget   Close

A confirmation query will pop up.

Is this budget complete?

☑ Is this budget ready to be submitted to the sponsor?

Cancel   OK

In KR, you must make the budget Complete AND Ready to Submit to Sponsor. If you are finished entering and editing the budget, check the box next to "Is this budget ready..." and click OK.

- If you still need to work on the budget and may need to edit it, cancel or click out of this pop-up window and return to this step to complete the budget when ready.

Use the Return to proposal button at the top of the left navigation menu.

Navigate to the Attachments section of the proposal.

Upload the full proposal which includes the budget from a separate system (Workspace, Assist, Fastlane, MIPS, other sponsor systems). Use the Attachment Type = "Other", enter a brief description, and upload the file.

OR

Upload the budget spreadsheet or form as one of the proposal attachments, using Attachment Type = "Other" and Budget as the description. Other proposal attachments should include UMB's proposed scope of work, agreement documents, clinical trial documents, etc.

File	Type *	Status *	Description
1 fiscal-report-template.xlsx	Other	Final	Budget