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 must use the Non-personnel Budget Entry method for NIH Modular budgets.
- You must use the Non-personnel Budget Entry method if the F&A rate cost basis is MTDC (Modified Total Direct Costs) and 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

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

![Periods & Totals](image)

Click “Save and Continue”. The Budget Summary screen appears.

At the bottom of the Budget Summary screen, click “Complete Budget”.

![Budget Summary](image)

A confirmation query will pop up.

![Confirmation Query](image)
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.

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<th>Status *</th>
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