Creating a "high-level" budget in Kuali Research
Non-personnel Budget Entry Method – non-Modular Budgets

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 proposal budget in Kuali Research. 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.).
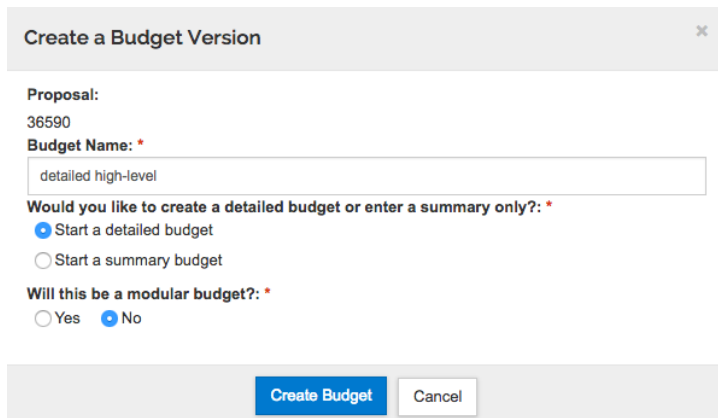
Non-personnel Budget Entry

Click +Add Budget
Enter a Budget Name
Select "Start a detailed budget"
Respond to the question "Will this be a modular budget?"
Click Create Budget

KR will bring up the Project Personnel screen

Select Budget settings from the top menu bar

In the Budget Settings window, review and modify as needed the On/off Campus setting and the F&A Rate Types. Click Apply Changes

Using the left navigation menu, go to the Non-Personnel Costs section of the budget.
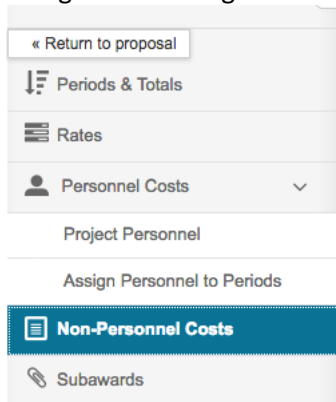
Click Assign Non-Personnel
- In the Add Assigned Non-Personnel window, select:
- Category Type = Other Direct
- Category = Other Operating Expenses
- Object Code Name = Direct Costs except subs/equipment

- In the Total Base Cost field, enter the amount that represents the year 1 direct costs for the project, minus any equipment (>$5000 acquisition cost) and minus the total amount of any subawards.

Click Add Non-Personnel Item to 1

Add Assigned Non-Personnel   ✕

Category Type:	Other Direct
Category:	Other Operating Expenses
Object Code Name: *	Direct Costs except subs/equipment
Total Base Cost:	173,000.00
Quantity:	
Description:	

[Add Non-Personnel Item to 1]   [Cancel]

If the budget includes equipment, click Assign Non-Personnel and add the equipment as a separate line item.

Non-Personnel Costs
Add and configure non-personnel items for this budget period.

Period 1   Period 2   Period 3

Period 1
[Assign Non-Personnel...]

Description	⇕	Description	⇕	Quantity	⇕	Total Base Cost	⇕	Actions
Equipment								
Equipment						12,500.00		Details 🗑
Other Direct								
Direct Costs except subs/equipment						173,000.00		Details 🗑

If the budget does not include a subaward, skip to Enter/Autocalculate All Periods (page 4)

If the budget includes a subaward:

1. (Preferred method) Enter Direct Costs except subs/equipment, and any equipment entries, for all years, then upload a completed subaward budget form following standard procedures (http://www.umaryland.edu/media/umb/ord/documents/kc/Upload-Subaward-Budget.docx). This method is strongly recommended for budgets with an MTDC F&A rate. NOTE: Upload the completed subaward budget form AFTER all budget years have been entered or autocalculated.

Subawards

Upload a pre-formatted budget document for a subawardee organization or enter details manually.

Organization Id	⇕	File Name
Duke University (003148)		DukeSub.pdf

OR

2. (Alternate method) Manually enter the subaward costs. Click Add Assigned Personnel.
In the Add Assigned Non-Personnel window, select:
- Category Type = Other Direct
- Category = Subcontracts
- Object Code Name: select the appropriate category. For TDC cost basis budgets, use Subcontract >25k. For MTDC cost basis budgets, you will need to calculate the amount for the first $25,000 and the balance and create multiple entries, selecting the appropriate object codes.

Enter/Autocalculate All Periods
If you have not done so already, select Autocalculate Periods from the top menu bar, or manually enter future year amounts.
- NOTE: In KR, inflation is NOT applied to any of the three object codes that you will use for high level budgets. If you want inflation from year to year, you will need to calculate it and manually enter or adjust the amounts.

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

A confirmation query will pop up.

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.

Is this budget complete? ✕

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

Cancel **OK**

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