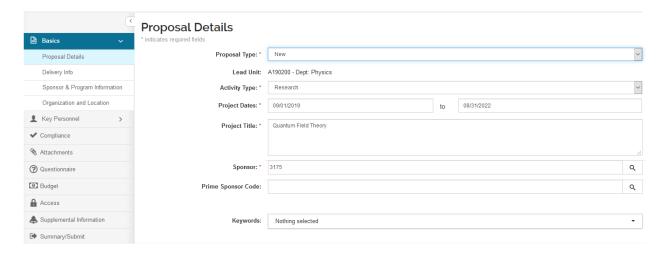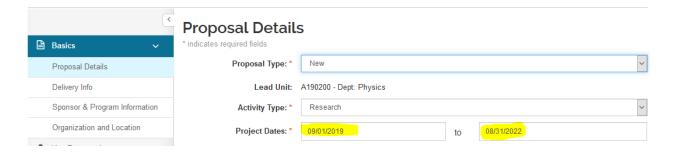# QUICK GUIDE
CHANGING PROPOSAL & BUDGET DATES

Overview: Follow the instructions below to update proposal and budget periods for a proposal in the Kuali Proposal Development module.

STEP 1 – Search for your proposal and click the **Edit** link to open it in modify mode. The proposal should open with **Proposal Details** as the default display.
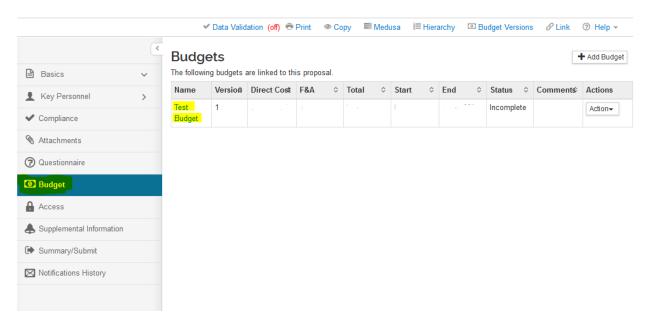

STEP 2 – To modify the proposal start and end dates, in the **Proposal Details** section click in the first **Project Dates** field (the start date) and override the existing date with the new start date. Then repeat the step for the end date field. Click **Save** at the bottom of the screen to save your changes.
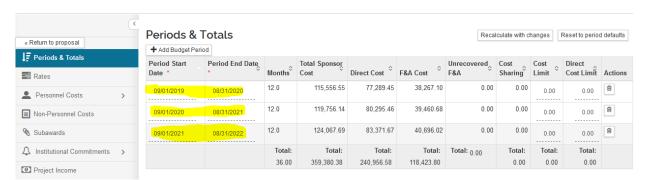
STEP 3 – Once you change the project start and end date in the **Proposal Details** section, you will need to carry this change to the **Budget** dates. Navigate to the **Budget** screen and then click the blue hyperlink for the **Budget Version** you are currently working on.
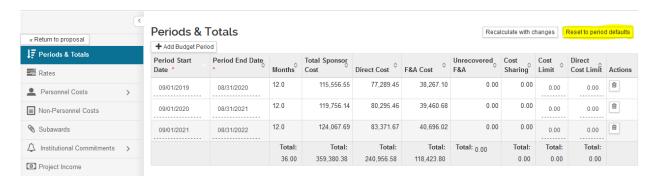
| | ✓ Data Validation (off) | 🖶 Print | 👁 Copy | ▦ Medusa | ☰ Hierarchy | ▣ Budget Versions | 🔗 Link | ⑦ Help ▾ |

Budgets   ➕ Add Budget

The following budgets are linked to this proposal.

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
Test Budget	1						Incomplete		Action▾

Sidebar: Basics ⌄ | Key Personnel ❯ | Compliance | Attachments | Questionnaire | **Budget** | Access | Supplemental Information | Summary/Submit | Notifications History

STEP 4 – Once inside the correct **Budget Version**, navigate to the **Periods & Totals** section. When you access this panel, you will see that the **Period Start** and **End Dates** reflect the original **Project Dates** (the dates before the change in the **Proposal Details** section).
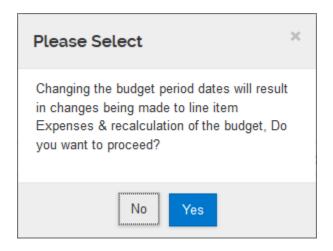
Periods & Totals   Recalculate with changes | Reset to period defaults

➕ 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
09/01/2019	08/31/2020	12.0	115,556.55	77,289.45	38,267.10	0.00	0.00	0.00	0.00	🗑
09/01/2020	08/31/2021	12.0	119,756.14	80,295.46	39,460.68	0.00	0.00	0.00	0.00	🗑
09/01/2021	08/31/2022	12.0	124,067.69	83,371.67	40,696.02	0.00	0.00	0.00	0.00	🗑
		Total: 36.00	Total: 359,380.38	Total: 240,956.58	Total: 118,423.80	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	

Sidebar: « Return to proposal | **Periods & Totals** | Rates | Personnel Costs ❯ | Non-Personnel Costs | Subawards | Institutional Commitments ❯ | Project Income
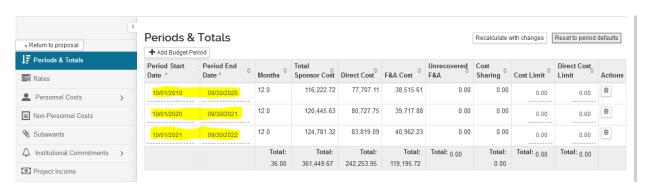
STEP 5 – Kuali does NOT automatically update the Budget start and end date after the proposal start and end dates have been modified. To modify the **Budget** dates so they match the dates in the **Proposal Details** section, click the **Reset to period defaults** button.

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
09/01/2019	08/31/2020	12.0	115,556.55	77,289.45	38,267.10	0.00	0.00	0.00	0.00	🗑
09/01/2020	08/31/2021	12.0	119,756.14	80,295.46	39,460.68	0.00	0.00	0.00	0.00	🗑
09/01/2021	08/31/2022	12.0	124,067.69	83,371.67	40,696.02	0.00	0.00	0.00	0.00	🗑
		Total: 36.00	Total: 359,380.38	Total: 240,956.58	Total: 118,423.80	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	

STEP 6 – A message should pop up that states: "Changing the budget period dates will result in changes being made to line item Expenses & recalculation of the budget. Do you want to proceed?" Click **Yes**.

Please Select

Changing the budget period dates will result in changes being made to line item Expenses & recalculation of the budget, Do you want to proceed?

No   Yes

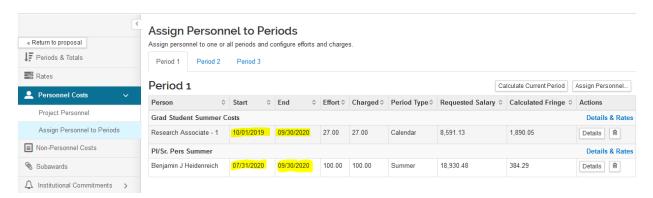**STEP 7** – You will notice the **Periods & Totals** panel will be updated with the new budget periods:

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
10/01/2019	09/30/2020	12.0	116,222.72	77,707.11	38,515.61	0.00	0.00	0.00	0.00	🗑
10/01/2020	09/30/2021	12.0	120,445.63	80,727.75	39,717.88	0.00	0.00	0.00	0.00	🗑
10/01/2021	09/30/2022	12.0	124,781.32	83,819.09	40,962.23	0.00	0.00	0.00	0.00	🗑
		Total: 36.00	Total: 361,449.67	Total: 242,253.95	Total: 119,195.72	Total: 0.00	Total: 0.00	Total: 0.00	Total: 0.00	

Step 8 – Next Navigate to the **Rates** section and click the **Sync All Rates** button in the upper right.
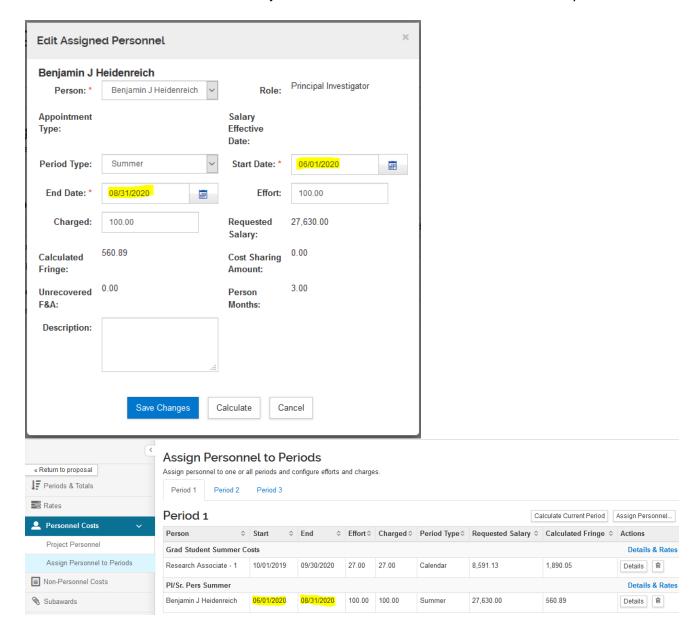

STEP 9 – Next you will need to update the start and end dates of the **Personnel Cost** elements. Navigate to the **Assign Personnel to Periods** section to make the required changes.

As you can see here the dates for the calendar year appointment have changed appropriately to the updated start and end dates. However, the summer salary for the PI has simply shifted forward one month in accordance with the one month shift in our start date. Therefore, we need to update the summer salary start and end dates to match our correct summer period (June 1st through August 31st). This will also occur with academic salary appointments.

STEP 10 – Click the **Details** button and adjust the associated start and end dates as necessary.

Repeat Step 9 for all **academic** and **summer** appointments within your budget to ensure accuracy.

GET HELP

KUALI GUIDES: https://www.umass.edu/research/kuali-guides

KUALI FAQs: https://www.umass.edu/research/kuali-research-faq

KUALI HELPDESK: https://www.umass.edu/research/webform/kuali-help-desk