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.

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).
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.

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.

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

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