

## QUICK GUIDE

## HOW TO CREATE A REVISED BUDGET BY COPYING A PROPOSAL ORIGINALLY SUBMITTED IN KUALI

**STEP 1:** Log in to Kuali and navigate to **Common Tasks**. Under **Proposal Development**, click **Search Proposals** and find your original proposal. Under the **Actions** column, select **copy**.

Actions	Proposal Number	Proposal Document Number	Proposal Type	Proposal State	Project Title	Prev Grants.Gov Tracking ID	Opportunity ID	Opportunity Title	Agency Routing Identifier	Sponsor Name	Principal Investigator	Lead Unit	Lead Unit Name	Sponsor Deadline	Opportunity ID	Hierarchy Status	Proposal Create Date
view copy medusa	1173	91752	New		How to create a revised budget		NSF 19-599	Emerging Frontiers in Research and Innovation		NATIONAL SCIENCE FOUNDATION	Serena T Williams	A9999	Coll: Athletics - TEST	12/02/2019	NSF 19-599	Not in a hierarchy	11/06/2019 10:10 AM

**STEP 2:** The **Copy to New Document** dialog box will be displayed. Select the **Lead Unit** from the drop down list. Check the box next to **Yes. Include budget(s)**. If you need to include the attachments then click the box next to **Yes. Include attachments**. The **Yes. Include questionnaires** box will already be checked. Click **Copy**.

Copy To New Document ×

Original Lead Unit  
A9999 - Coll: Athletics - TEST

Lead Unit: \*

select ▼

Budget?

☒ Yes. Include budget(s).

Budget Version

All Versions ▼

Attachments?

☐ Yes. Include attachments.

Questionnaires?




☒ Yes. Include questionnaires.

Copy... Close

**STEP 3:** The **Proposal Details** screen will be displayed. Review the information that was copied from the original submission. Select **Revised Budget** from the dropdown list next to **Proposal Type**. A new field named **Original Institutional Proposal ID** was created when you selected **Revised Budget**.

## Proposal Details





\* indicates required fields

<b>Proposal Type: *</b>	<div>Revised Budget</div> <div>             select              Continuation              Internal (No Submission)              Letter of Intent              New              New - Change/Corrected              P &amp; A (Unrestricted Award)              Pre Proposal              Renewal              Renewal - Changed/Corrected              Resubmission              Resubmission - Changed/Corrected  <b>Revised Budget</b>              Supplement              Supplement - Changed/Corrected           </div>	
<b>Lead Unit:</b>		
<b>Activity Type: *</b>		
<b>Project Dates: *</b>		
<b>Project Title: *</b>		
<b>Sponsor: *</b>		
<b>Prime Sponsor Code:</b>	<input type="text"/> 	
<b>Award ID:</b>	<input type="text"/> 	
<b>Original Institutional Proposal ID:</b>	<input type="text"/> 	
<b>Keywords:</b>	<div>Nothing selected</div>	

**STEP 4:** Click the magnifying glass next to the **Original Institutional Proposal ID** field. The **Institutional Proposal Lookup** dialog box will appear.

## Proposal Details

\* indicates required fields

<b>Proposal Type: *</b>	<div>Revised Budget</div>	
<b>Lead Unit:</b>	A9999 - Coll: Athletics - TEST	
<b>Activity Type: *</b>	<div>Research</div>	
<b>Project Dates: *</b>	<div>10/01/2020</div> to <div>09/30/2022</div>	
<b>Project Title: *</b>	<div>How to create a revised budget</div>	
<b>Sponsor: *</b>	<div>0000003175</div> NATIONAL SCIENCE FOUNDATION 	
<b>Prime Sponsor Code:</b>	<input type="text"/> 	
<b>Award ID:</b>	<input type="text"/> 	
<b>Original Institutional Proposal ID:</b>	<input type="text"/> 	
<b>Keywords:</b>	<div>Nothing selected</div>	

**Step 5:** Type the PI's name in the **Proposal Person** field. Click **Search**.

Lookup

Institutional Proposal Lookup

Institutional Proposal Number:

Proposal Type:
select

Status:

Account ID:

Project Title:

Unit ID:

Unit Name:

Proposal Person:
Williams\*

Proposal Person:

Sponsor ID:

Sponsor Name:

Proposal Create Date:
to

Close
Clear Values
Search

**STEP 6:** A list of the PI's proposals will be returned. Under the **Actions** column, **select** the record for the original proposal – review carefully. Click **Save**.

Lookup

Institutional Proposal Lookup

Show 10 entries

Actions	Institutional Proposal Number	Proposal Type	Activity Type	Status	Lead Unit ID	Lead Unit Name
select	19090077	New	Research	Pending	A999999	Dept: Athletics - TEST
select	00242531	New	Research	Pending	A999999	Dept: Athletics - TEST
select	19102973	New	Research	Pending	A999999	Dept: Athletics - TEST

The **Original Institutional Proposal ID** field has been populated.

### Proposal Details

\* indicates required fields

Proposal Type: *	Revised Budget		
Lead Unit:	A9999 - Coll: Athletics - TEST		
Activity Type: *	Research		
Project Dates: *	10/01/2020	to	09/30/2022
Project Title: *	How to create a revised budget		
Sponsor: *	0000003175	NATIONAL SCIENCE FOUNDATION	Q
Prime Sponsor Code:			Q
Award ID:			Q
Original Institutional Proposal ID:	19090077		Q
Keywords:	Nothing selected		

Save Save and Continue Close

**STEP 7:** Navigate to the **Delivery Info** screen and indicate how the revised budget will be submitted. Click **Save**.

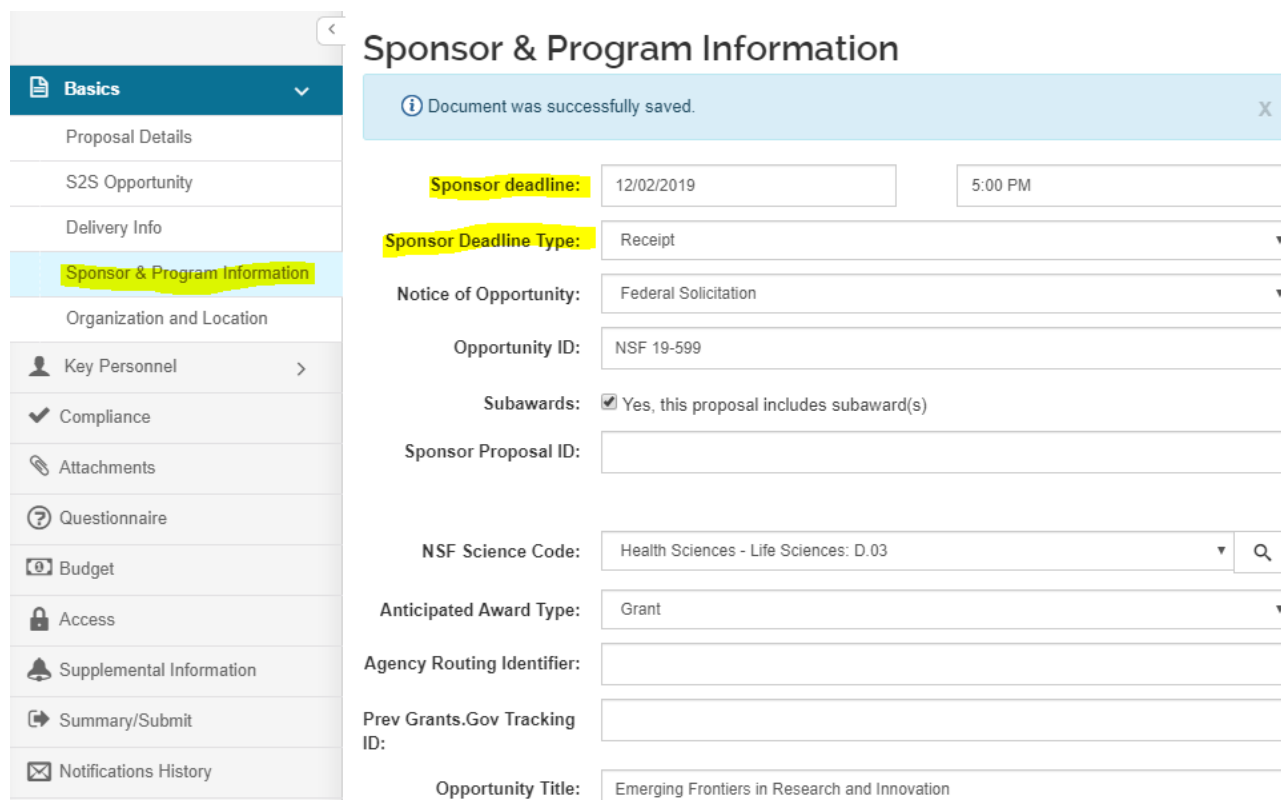
### Delivery Info

Document was successfully saved.

Submission By:	OPAS
Submission Type:	Web Portal
Submission Account ID:	
Submission Name & Address:	<a href="#">Change</a> <a href="#">Clear</a>
Number of copies:	
Submission description:	

Back Save Save and Continue Close

**STEP 8:** Navigate to the **Sponsor & Program Information** screen and complete the **Sponsor deadline** and **Sponsor Deadline Type** fields.



**Sponsor & Program Information**

Document was successfully saved.

**Sponsor deadline:** 12/02/2019 5:00 PM

**Sponsor Deadline Type:** Receipt

**Notice of Opportunity:** Federal Solicitation

**Opportunity ID:** NSF 19-599

**Subawards:** ☒ Yes, this proposal includes subaward(s)

**Sponsor Proposal ID:**

**NSF Science Code:** Health Sciences - Life Sciences: D.03

**Anticipated Award Type:** Grant

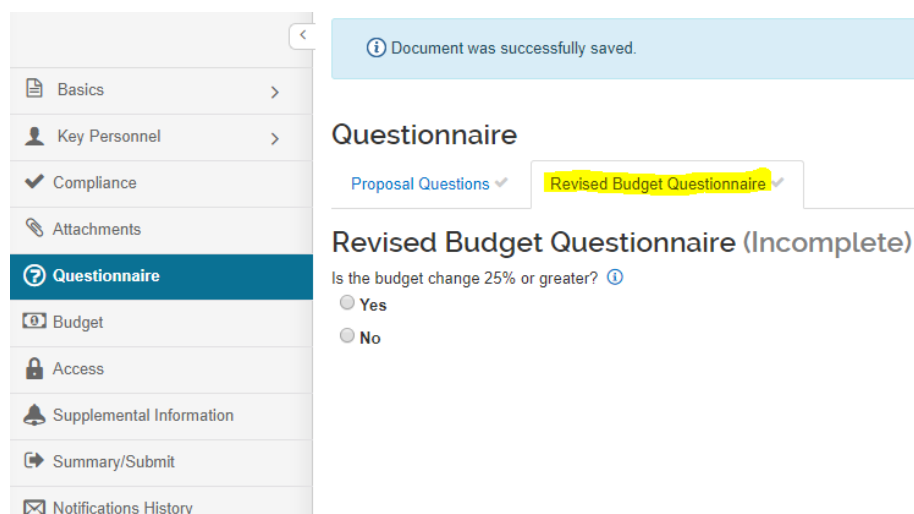
**Agency Routing Identifier:**

**Prev Grants.Gov Tracking ID:**

**Opportunity Title:** Emerging Frontiers in Research and Innovation

**STEP 9:** Navigate to the **Budget** tab and revise the budget. Load any necessary documents to the **Attachments** section.

**STEP 10:** Complete the **Revised Budget Questionnaire** under the **Questionnaire** section. If the budget change is 25% or greater the proposal will get re-routed.



**Questionnaire**

Document was successfully saved.

**Proposal Questions** **Revised Budget Questionnaire**

**Revised Budget Questionnaire (Incomplete)**

Is the budget change 25% or greater?

☐ Yes

☐ No

**STEP 11:** Once finished, navigate to the **Summary/Submit** screen and click the **Submit for Review** button.