QUICK GUIDE

HOW TO CREATE A REVISED BUDGET AND LINK IT TO A LEGACY (SMARTGRANT) RECORD

STEP 1: Log in to Kuali and navigate to Common Tasks. Under Proposal Development, click on Create Proposal. The Proposal Details screen will be displayed.

STEP 2: Select Revised Budget from the dropdown list next to Proposal Type.

STEP 3: Follow the steps that you normally would to complete the required fields. A new field named Original Institutional Proposal ID was created when you selected Revised Budget.
STEP 4: Click the magnifying glass next to the **Original Institutional Proposal ID** field. The **Institutional Proposal Lookup** dialog box will appear. Type the PI’s name in the **Proposal Person** field. Click **Search**.

STEP 5: A list of the PI’s proposals has been returned. Under the **Actions** column, select the legacy record that you want to link to.
The **Original Institutional Proposal ID** field has been populated.

**Proposal Details**

* indicates required fields

- **Proposal Type:** Revised Budget
- **Lead Unit:** A4066 - Coll Research
- **Activity Type:** Research
- **Project Dates:** 10/01/2019 to 05/30/2020
- **Project Title:** Managing Small Groups to Meet the Social and Psychological Demands of Scientific and Engineering Practices in High School Science
- **Sponsor:** 0000000175 NATIONAL SCIENCE FOUNDATION
- **Prime Sponsor Code:**
- **Award ID:**
- **Original Institutional Proposal ID:** 000/2975

**STEP 6:** Follow the steps that you normally would to complete your proposal. Complete the **Revised Budget Questionnaire** under the **Questionnaire** section. If the budget change is 25% or greater the proposal will get re-routed.

**STEP 7:** Navigate to the **Summary/Submit** screen and click the **Submit for Review** button.