

Building a Detailed Budget

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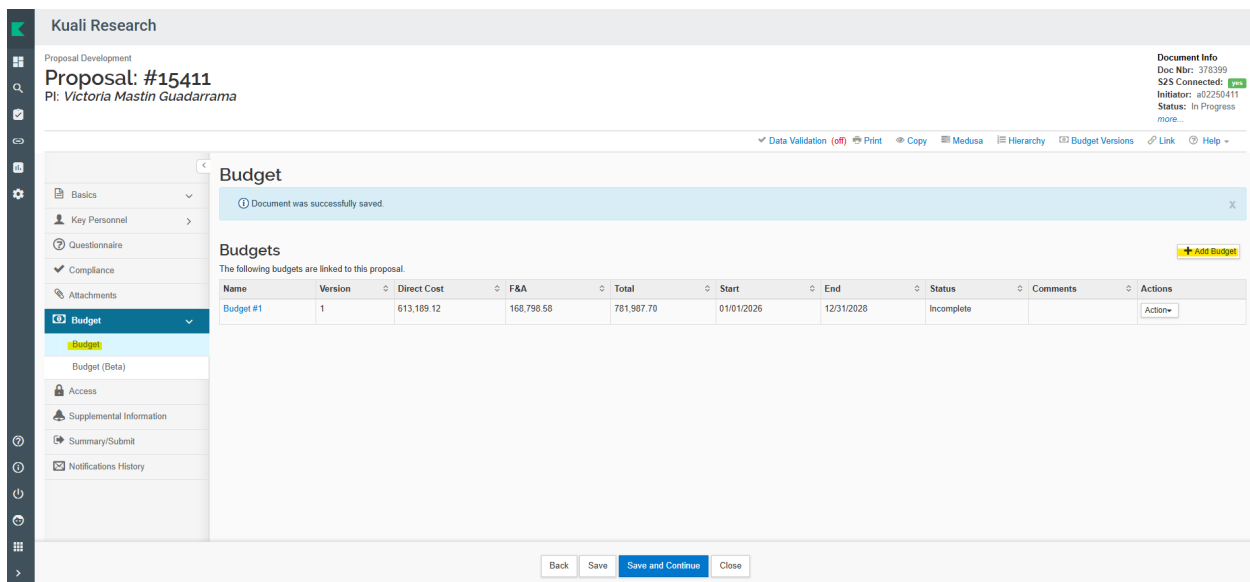
Building a Detailed Budget in Kualu Research

This guide provides step-by-step instructions for creating a detailed budget in Kualu Research. A well-structured budget is a required component of all proposals and ensures accurate financial planning.

Step 1: Create a Budget

Navigate to the **Budget Panel** within the proposal document.

Click **+Add Budget**.



Kualu Research

Proposal Development
Proposal: #15411
 PI: Victoria Mastin Guadarrama

Document Info
 Doc Nbr: 378399
 S2S Connected: ✔
 Initiator: a02259411
 Status: In Progress
 more...

Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

Budget

Document was successfully saved.

Budgets +Add Budget

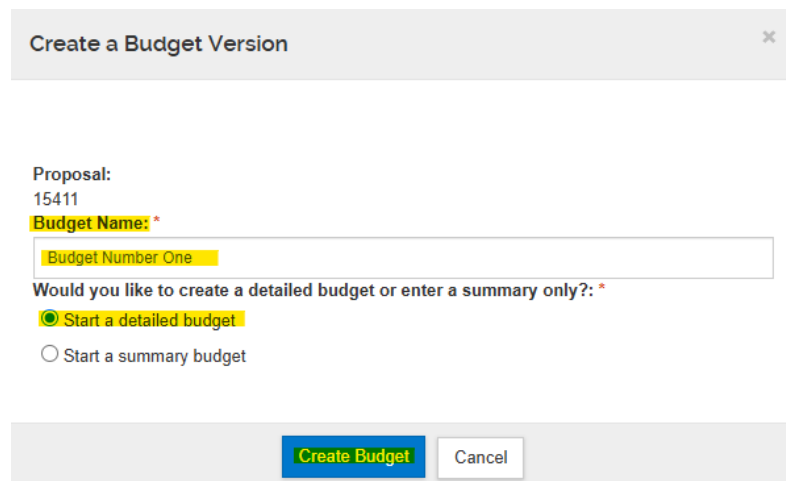
The following budgets are linked to this proposal.

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
Budget #1	1	613,189.12	168,798.58	781,987.70	01/01/2026	12/31/2028	Incomplete		Action

Back Save Save and Continue Close

Although multiple budgets can be drafted, only one budget version may be submitted per proposal.

Enter a **Budget Name**, select **Start a Detailed Budget**, and click **Create Budget**.



Create a Budget Version ✕

Proposal:
15411

Budget Name: *

Budget Number One

Would you like to create a detailed budget or enter a summary only?: *

Start a detailed budget

Start a summary budget

Create Budget Cancel

Step 2: Understanding the Periods and Totals Tab

Once the budget is created, navigate to **Periods and Totals**. The **Periods and Totals** tab is crucial to maintaining budget accuracy. Key considerations include:

- **Each period must represent one year.** Do not delete additional periods or condense multi-year projects into a single period.
- Use this tab to enter **total cost** and **direct cost limits** for each period.
- The **Unrecovered F&A** section displays indirect costs not covered by the sponsor.

Kuali Research

Proposal #15707 > Budget #1

Budget #1: The Budget

Marked For Submission: No
02/24/2025
Created: #15707
Proposal: more...

Data Validation (off) Budget Settings Hierarchy Summary Budget Versions Help

Return to proposal
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	
02/01/2025	01/31/2026	12.0	1,034,905.57	711,990.11	322,915.46	0.00	503,507.08	0.00	0.00		
02/01/2026	01/31/2027	12.0	1,106,165.65	760,892.91	345,272.74	0.00	557,709.30	0.00	0.00		
02/01/2027	01/31/2028	12.0	1,141,741.74	785,357.45	356,384.29	0.00	576,410.60	0.00	0.00		
02/01/2028	01/31/2029	12.0	1,178,023.12	810,307.99	367,715.13	0.00	595,732.05	0.00	0.00		
		Total:	48.00	4,460,836.08	Total:	Total:	0.00	Total:	0.00	Total:	0.00
				3,068,548.46	1,392,287.62		2,233,359.03				

Save Save and Continue Complete Budget Close

Step 3: Understanding the Rates Tab

The **Rates** tab includes budgeting rates used throughout the proposal.

There are three rate tabs:

- Research Development F&A
- Fringe Benefits
- Inflation

Within each tab, focus on:

- **On Campus Flag** – identifies on- vs. off-campus classification
- **Institute Rate** – official institutional rate
- **Applicable Rate** – rate applied to the budget

Rates should only be updated in this tab to ensure changes apply proposal-wide. **Do not modify rates at the line-item level.** Double-check use of off-campus rates, confirm with proposal analyst if unsure. If any adjustments are made and need to be reverted, the tab includes an option to **reset to default rates** to maintain compliance.

Rates

[Refresh All Rates](#) [Sync All Rates](#)

Verify the default rates set by your institution. You can override them if necessary by clicking the edit icon to the right of each row.

Research Development F & A [Fringe Benefits](#) [Inflation](#)

Research Development F & A

[Sync to Current Institutional Rates](#) [Reset to Default Rates](#)

Description	On Campus Flag	Fiscal Year	Start Date	Institute Rate	Applicable Rate
MTDC					
MTDC	No	2024	07/01/2023	21.30	21.30
MTDC	Yes	2024	07/01/2023	46.00	46.00
Rates Award Only					
Award MTDC	No	2024	07/01/2023	21.30	21.30
Award MTDC	Yes	2024	07/01/2023	46.00	46.00
Award TDC	No	2024	07/01/2023	21.30	21.30
Award TDC	Yes	2024	07/01/2023	46.00	46.00
TDC					
TDC	No	2024	07/01/2023	21.30	21.30
TDC	Yes	2024	07/01/2023	46.00	46.00

Step 4: Add Personnel

Review the **Project Personnel** section to see listed individuals. The **Project Personnel** section automatically pulls individuals from the **main proposal personnel tab**.

Principal Investigators (PIs) and Co-Investigators (Co-Is) should have effort listed.

Additional personnel, including "To Be Named" roles (e.g., Postdocs, Graduate Assistants), can be added using the **Search** feature.

Editing Personnel Details

Click **Details** to update:

- **Salary information**, including base salary and appointment type.
- **Effective dates**
- **Full-Time Equivalent (FTE) status** to ensure accurate effort calculations.

Save all changes before proceeding.

Kualu Research

Proposal #15411 > Budget #3

Budget #3: Budget Number One

Marked For Submission: No
Created: 02/03/2025
Proposal: #15411
more...

Data Validation (off) Budget Settings Hierarchy Summary Budget Versions Autocalculate Periods Help

Project Personnel

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

Person	Job Code	Appointment Type	Base Salary	Actions
From Proposal Development				
Victoria Mastin Guadarrama	DEFAULT (AA000)	12M DURATION	0.00	Details

Back Save Save and Continue Complete Budget Close

Click **Add Personnel** to include additional employees or "To Be Named" roles.

Add Personnel
✕

Search for * ▼

Select the quantity of each 'to be named' person category to be returned to your budget.

Person Category ^	Quantity ◇
Computer Programmer	<input style="width: 80px;" type="text" value="0"/>
Coordinator	<input style="width: 80px;" type="text" value="0"/>
Data Entry Assistant	<input style="width: 80px;" type="text" value="0"/>
Data Manager	<input style="width: 80px;" type="text" value="0"/>
Graduate Research Assistant	<input style="width: 80px;" type="text" value="0"/>
Other Professional	<input style="width: 80px;" type="text" value="0"/>
Post-doc	<input style="width: 80px;" type="text" value="0"/>
Project Director	<input style="width: 80px;" type="text" value="0"/>
Research Associate	<input style="width: 80px;" type="text" value="0"/>
Undergraduate	<input style="width: 80px;" type="text" value="0"/>

Add TBN Personnel to Budget
Cancel

Use the **Search** feature to locate employees or manually add placeholders.

Step 5: Edit Personnel Details

Click **Details** next to each individual to verify or edit:

- Appointment Type
- Base Salary (auto-populates for employees)
- Salary Effective Date should always be today's date

Save changes before proceeding.


Edit Personnel ✕

Victoria Mastin Guadarrama


[Details](#) [Salary by Period](#)


Details


Role: Principal Investigator

Job Code: * 

Job Title: DEFAULT

Appointment Type: 

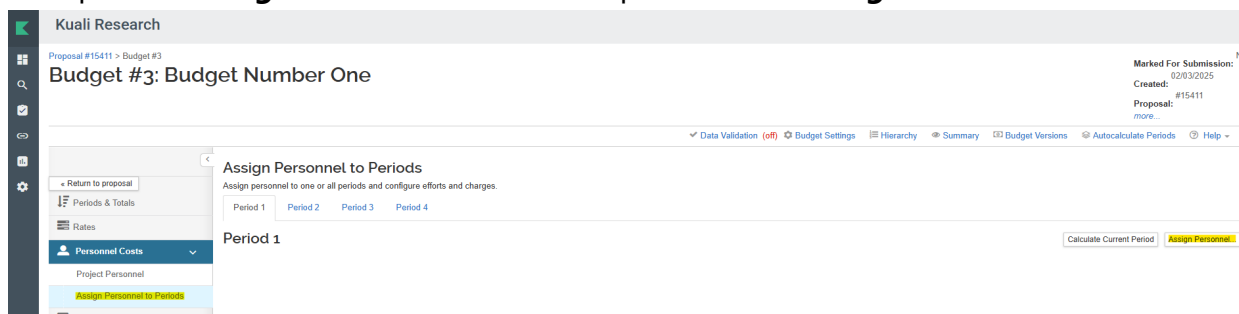
Salary Effective Date: 

Salary Anniversary Date: 

Base Salary:

Step 6: Assign Personnel to Budget Periods

Open the **Assign Personnel to Periods** panel. Select **Assign Personnel**



When budgeting for **graduate and undergraduate students**, it's important to account for **different fringe benefit rates** based on whether they are working during the academic year or summer.

Academic Year Rates

- Apply when students are **enrolled in courses** during the Fall and Spring semesters.
- Include **standard fringe benefits**, but **do not include health insurance**, as students receive coverage through their enrollment.

Summer Rates

- Apply when students are working **full-time over the summer** and **not enrolled in classes**.
- Fringe rates are **higher in summer** because students are eligible for **health insurance coverage** during this period.
- Used for **Graduate Student Salary - Summer** and **Undergraduate Student Salary - Summer** categories.

The **Object Code** defines the type of compensation and associated fringe benefits rates. Here is a brief overview of each object code and their use case.

Object Code	Fringe Rate Application
Graduate Student Salary Summer	Summer benefit rate-includes health insurance
Graduate Student Salary Academic	Standard graduate fringe rate
Undergraduate Student Salary Summer	Summer benefit rate-includes health insurance
Undergraduate Student Salary Academic	Standard undergraduate fringe rate
Salaries	Standard fringe rate
Wages	Temporary or hourly employees
Salaries Post Doc	Higher fringe rate applies

Add Personnel to Period

Person:
 Appointment Type:
 Salary Effective Date:
Object Code:
 Group:
Start Date:
End Date:
Effort %:
Charged %:
 Requested Salary: 0.00
 Period Type:

For each **person**, enter:

Object Code: defines type of compensation and associated fringe benefits.

Start and End Dates for effort

Effort Percentage: total amount of time dedicated to the project.

Charged Percentage: portion of salary paid by sponsor.

Cost Share Amount: if applicable, portion of salary not paid by sponsor.

Click **Assign to Period**. Repeat for each personnel member.

Cost Share Considerations

- This is the difference between effort percentage and charged percentage.
- Cost sharing beyond **unrecovered F&A** must be detailed in the **Institutional Commitment Screens**.

Note: Manually entering data in later periods disables auto-calculation. You will likely want auto-calculation, avoid manually entering data in later periods if possible.

Step 7: Verify and Save Personnel Data

Review **effort, charge, salary calculations,** and **fringe benefits.** Select **details** to edit.

For **fringe benefits,** pay close attention to graduate and undergraduate summer vs. academic **Object Code.** This code determines the appropriate fringe rate.

Adjust as needed, **save and continue.** DO NOT AUTO-CALCULATE YET!

Under **Details & Rates,** you have the option to use **Apply to Later Periods,** which copies information from earlier periods to later ones. Using this feature will **disable auto-calculation** for the remainder of the proposal.

To apply, go to the **Actions** column, select **Details & Rates,** make any necessary changes, and then click **Apply to Later Periods.**

Description	Start Date	Institution Rate	Applicable Rate
Inflation	07/01/2025	3.00	3.00
Inflation	07/01/2026	3.00	3.00

Apply Inflation:

Submit cost sharing:

On Campus:

Step 8: Add Non-Personnel Costs

Navigate to the **Non-Personnel Costs** panel.

Click **Assign Non-Personnel**.

The screenshot shows the 'Non-Personnel Costs' interface. At the top, it displays 'Kualu Research' and 'Proposal #15411 > Budget #3'. The main heading is 'Budget #3: Budget Number One'. On the right, there is a 'Marked For Submission' status and a 'Created' date of 02/03/2025. Below this, there are navigation tabs for 'Data Validation (off)', 'Budget Settings', 'Hierarchy', 'Summary', 'Budget Versions', 'Autocalculate Periods', and 'Help'. The main content area is titled 'Non-Personnel Costs' and includes a sub-heading 'Add and configure non-personnel items for this budget period.' There are four tabs for 'Period 1', 'Period 2', 'Period 3', and 'Period 4'. The 'Period 1' tab is active, showing a yellow button labeled 'Assign Non-Personnel'. A left-hand navigation menu includes options like 'Return to proposal', 'Periods & Totals', 'Rates', 'Personnel Costs', 'Non-Personnel Costs' (highlighted), 'Subawards', 'Project Income', 'Modular', 'Budget Notes', and 'Budget Summary'. At the bottom, there are buttons for 'Back', 'Save', 'Save and Continue', 'Complete Budget', and 'Close'.

Select **Object Code Name** to classify the expense, and provide a **Total Base Cost** to reflect the estimated expense amount. Some Common **Object Code Names**:

- Equipment \$5000 & over
- Operating Supplies
- Lab Supplies
- Software \$100,00 or less
- Office Supplies
- Travel
- Tuition and Fees
- Student Health Insurance
- Waived F & A as Cost Share

The 'Add Assigned Non-Personnel' dialog box contains the following fields and values:

- Category Type:** select
- Category:** Select
- Object Code Name:** Software \$100,000 or less
- Total Base Cost:** 10,000.00
- Quantity:** (empty)
- Description:** (empty)

At the bottom of the dialog, there are two buttons: 'Add Non-Personnel Item to 1' and 'Cancel'.

Step 9: Edit Non-Personnel Details

Click **Details** next to each item to:

- Adjust cost-sharing amounts
- Do not click on or change the rates calculations

Save changes and return to the **Non-Personnel Costs** panel.

Kuali Research

Proposal #15411 > Budget #3

Budget #3: Budget Number One

Marked For Submission: No
Created: 02/03/2025
Proposal: #15411
[more...](#)

Data Validation (off) Budget Settings Hierarchy Summary Budget Versions Autocalculate Periods Help

← Return to proposal

Periods & Totals

Rates

Personnel Costs

Non-Personnel Costs

Subawards

Project Income

Modular

Budget Notes

Budget Summary

Non-Personnel Costs

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

Period 1 [Period 2](#) [Period 3](#) [Period 4](#)

Period 1 Assign Non-Personnel...

Description	Description	Quantity	Total Base Cost	Actions
Other Direct				
Lab Supplies			10,000.00	Details
Software \$100,000 or less			10,000.00	Details
Travel				
Travel (General)			15,000.00	Details

Back Save **Save and Continue** Complete Budget Close

Step 10: Institutional Commitments

Cost Sharing Tab: Use this tab to document cost sharing, including waived F&A that is being counted as cost share.

Kuali Research

Proposal #15707 > Budget #1

Budget #1: The Budget

Marked For Submission: Yes
02/24/2025
Created: #15707
Proposal: more...

Data Validation (off) Budget Settings Hierarchy Summary Budget Versions Help

View Summary View Subaward Cost Share

Cost Sharing

Assign and distribute any additional unallocated expenses to stakeholders, institutions, or other individuals.

+ Add Cost Sharing

Period	Percentage	Source Account	Amount	Unit Details	Cost Share Type	Actions
1. 02/01/2025 - 01/31/2026	0.00	tbd	503,597.08		select	Details Q
2. 02/01/2025 - 01/31/2026	0.00	tbd2	725,793.63		Mandatory	Details Q
3. 02/01/2026 - 01/31/2027	0.00	tbd	557,709.30		select	Details Q
4. 02/01/2027 - 01/31/2028	0.00	tbd	576,410.60		select	Details Q
5. 02/01/2028 - 01/31/2029	0.00	tbd	595,732.05		select	Details Q
			Total Allocated: 2,959,152.66			
			Total Unallocated: -0.00			

Cost Share Comment:

Reset to Default

Back Save Save and Continue Complete Budget Close

- **Source Account (Index):** This is the required field. Enter the index or account that will cover the cost share. If the account is not yet known, enter **TBD** to clear system errors.
- **Cost Share Type:** Choose the appropriate cost share type. **Mandatory** cost shares must be indicated. If unsure, contact your Proposal Development Specialist.
- **Unit Details:** Optional. Only complete if your unit requires additional documentation.
- **Amount and Percentage:** Edits are not generally required in these fields.

Unrecovered F&A Tab: This tab appears **only** if you've changed the F&A rate from the standard institutional rate (e.g., due to a sponsor restriction). **No action is needed** in this tab.

KUALI RESEARCH

- Dashboard
- Search Records
- Common Tasks
- All Links
- Reports
- Configuration
- Help
- About
- Logout
- Guadarrama, Victoria Mastin
- Switch Apps
- Collapse Menu

Kuali Research

Proposal #15707 > Budget #1

Budget #1: The Budget

Marked For Submission: No

Created: 02/24/2025

Proposal: #15707

[more...](#)

[Data Validation \(off\)](#)
[Budget Settings](#)
[Hierarchy](#)
[Summary](#)
[Budget Versions](#)
[Help](#)

Cost Sharing [View Summary](#) [View Subaward Cost Share](#)

Assign and distribute any additional unallocated expenses to stakeholders, institutions, or other individuals.

+ Add Cost Sharing

#	Period	Percentage	Source Account	Amount	Unit Details	Cost Share Type	Actions
1	1: 02/01/2025 - 01/31/2026	0.00	tbd	503,507.08		select	Details Q Q
2	2: 02/01/2026 - 01/31/2027	0.00	tbd	557,709.30		select	Details Q Q
3	3: 02/01/2027 - 01/31/2028	0.00	tbd	576,410.60		select	Details Q Q
4	4: 02/01/2028 - 01/31/2029	0.00	tbd	595,732.05		select	Details Q Q
				Total Allocated:			
				2,233,359.03			
				Total Unallocated:			
				725,793.63			

Cost Share Comment:

[Reset to Default](#)

Back Save Save and Continue Complete Budget Close

Cost Share Report: To find the Cost Share Allocations report exit the budget by selecting **return to proposal**. From the Budget tab, in the **action** column, select **Print**.

Kuali Research

Proposal Development
Proposal: #15707
 PI: Victoria Mastin Guadarrama

Document Info
 Doc Nbr: 382039
 SZS Connected:
 Initiator: a02250411
 Status: In Progress
[more...](#)

▼ Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

Budget

Document was successfully saved.

Budgets + Add Budget

The following budgets are linked to this proposal.

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
The Budget (for submission)	1	3,026,712.19	454,006.87	3,480,719.06	02/01/2025	01/31/2029	Incomplete		Action View Summary Copy Print Complete Budget Remove from Subn

Back Save Save and Continue Close

Check the Select box for **Budget Costshare Summary Report** and choose **Print**.

Print budget documents

Select the documents below you wish to print:

Print Forms	Print Budget Comments	Select
1 Budget Costshare Summary Report	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Budget Cumulative Report	<input type="checkbox"/>	<input type="checkbox"/>
3 Budget Salary Report	<input type="checkbox"/>	<input type="checkbox"/>
4 Budget Summary Report	<input type="checkbox"/>	<input type="checkbox"/>
5 Budget Summary Total Report	<input type="checkbox"/>	<input type="checkbox"/>
6 Budget Total Report	<input type="checkbox"/>	<input type="checkbox"/>
7 Industrial Budget Report	<input type="checkbox"/>	<input type="checkbox"/>
8 Industrial Cumulative Budget Report	<input type="checkbox"/>	<input type="checkbox"/>

Print

Close

A download will automatically begin of a pdf version of the Budget Summary. The resulting report includes a breakdown of **cost sharing amounts** for the entire budget.

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Proposal #15411 > Budget #3

Budget #3: Budget

« Return to proposal

Periods & Totals

Rates

Personnel Costs

Non-Personnel Costs

Subawards

Project Income

Modular

Budget Notes

Budget Summary

Step 11: Additional Tabs

Subawards: Manage and input budget details for collaborating institutions or organizations receiving a portion of the award funding.

Project Income: No action required. Track and document any anticipated income generated by the project, such as fees, services, or product sales.

Modular: Configure budgets using the NIH modular format, allowing for simplified budget submissions in \$25,000 increments without detailed justifications.

Budget Notes: Add and organize notes or explanations related to specific budget items or overall budgeting decisions for reference and clarity.

Step 12: Auto calculation

Auto-calculation helps streamline budget entry by copying **Period 1** budget lines into future periods, automatically applying a **3% inflation rate** by default.

How to Use Auto-Calculation

1. **Ensure all personnel and non-personnel costs are entered for Period 1.**
2. Click the **Auto-Calculate Periods** button in the Budget Periods panel.
3. Review the calculated totals for each period.

Before **Auto-Calculate**:

	P1 (01/01/2026 - 12/31/2026)	P2 (01/01/2027 - 12/31/2027)	P3 (01/01/2028 - 12/31/2028)	P4 (01/01/2029 - 01/09/2029)	Totals
Personnel					
Salary	\$862,750.00	\$0.00	\$0.00	\$0.00	\$862,750.00
Salaries	\$507,500.00	\$0.00	\$0.00	\$0.00	\$507,500.00
Salaries - Post Doctoral	\$152,250.00	\$0.00	\$0.00	\$0.00	\$152,250.00
Graduate Student Salary Academic	\$101,500.00	\$0.00	\$0.00	\$0.00	\$101,500.00
Graduate Student Salary Summer	\$101,500.00	\$0.00	\$0.00	\$0.00	\$101,500.00
Fringe	\$310,946.50	\$0.00	\$0.00	\$0.00	\$310,946.50
Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Personnel Subtotal	\$1,173,696.50	\$0.00	\$0.00	\$0.00	\$1,173,696.50
Non-personnel					
Travel	\$15,000.00	\$0.00	\$0.00	\$0.00	\$15,000.00
Other Direct	\$20,000.00	\$0.00	\$0.00	\$0.00	\$20,000.00
Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Non-personnel Subtotal	\$35,000.00	\$0.00	\$0.00	\$0.00	\$35,000.00
Totals					
Total Direct Cost	\$1,208,696.50	\$0.00	\$0.00	\$0.00	\$1,208,696.50
Total F&A Costs	\$336,017.63	\$0.00	\$0.00	\$0.00	\$336,017.63
Totals Subtotal	\$1,544,714.13	\$0.00	\$0.00	\$0.00	\$1,544,714.13

Important Notes

- **Manual entries in later periods disable auto-calculation.** If you edit a future period manually, auto-calculation cannot be re-enabled without deleting all future-period data.
- If you need to apply **different inflation rates or adjustments**, you will need to **manually update later periods** instead of using auto-calculate.
- The **Apply to Later Periods** feature can be used instead if you want to copy specific changes from Period 1 without triggering full auto-calculation.

After Auto-Calculate:

Kuali Research

Proposal #15411 > Budget #3
Budget #3: Budget Number One

Marked For Submission: No
 Created: 02/03/2025
 Proposal: #15411
[more...](#)

✓ Data Validation (off)
⚙ Budget Settings
📊 Hierarchy
📄 Summary
📄 Budget Versions
🆘 Help

Return to proposal

Periods & Totals

Rates

Personnel Costs

Project Personnel

Assign Personnel to Periods

Non-Personnel Costs

Subawards

Project Income

Modular

Budget Notes

Budget Summary

Budget Summary

	P1 (01/01/2026 - 12/31/2026)	P2 (01/01/2027 - 12/31/2027)	P3 (01/01/2028 - 12/31/2028)	P4 (01/01/2029 - 01/09/2029)	Totals
Personnel					
▶ Salary	\$862,750.00	\$888,632.50	\$915,291.48	\$22,471.39	\$2,689,145.37
▶ Fringe	\$310,946.50	\$323,827.12	\$337,041.58	\$8,317.06	\$980,132.26
Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Personnel Subtotal	\$1,173,696.50	\$1,212,459.62	\$1,252,333.06	\$30,788.45	\$3,669,277.63
Non-personnel					
▶ Travel	\$15,000.00	\$15,450.00	\$15,913.50	\$16,390.91	\$62,754.41
▶ Other Direct	\$20,000.00	\$20,600.00	\$21,218.00	\$21,854.54	\$83,672.54
Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Non-personnel Subtotal	\$35,000.00	\$36,050.00	\$37,131.50	\$38,245.45	\$146,426.95
Totals					
Total Direct Cost	\$1,208,696.50	\$1,248,509.62	\$1,289,464.56	\$69,033.90	\$3,815,704.58
Total F&A Costs	\$336,017.63	\$347,085.68	\$358,471.15	\$19,191.43	\$1,060,765.89
Totals Subtotal	\$1,544,714.13	\$1,595,595.30	\$1,647,935.71	\$88,225.33	\$4,876,470.47

Back
Save
Complete Budget
Close

Step 13: Data Validation & Fixing Errors

Before finalizing your budget, use **Data Validation** to check for missing or incorrect entries. Quali Research automatically detects errors and warnings that need to be resolved before submission.

Where to Find Data Validation: The **Data Validation** button is at the top right-hand corner of the budget screen. After selecting the data validation link, select "Turn On" to enable to the data validation feature.

Data Validation Turn On

Data Validation is currently off.

Close

Fix It Feature: Click any **Fix It** item to be taken directly to the issue.

Types of Validation Messages

- **Errors (Red) – Must Be Fixed**
 - These must be resolved before submission.
 - Example: "All funds for Cost Sharing must be allocated"
- **Warnings (Yellow) – Recommended Fixes**
 - These indicate potential issues but won't prevent submission.
 - Example: "Earning Period Start Date...."

Data Validation Turn Off

Show entries Search:

Area	Description	Severity	Actions
Error			
Cost Sharing	All funds for Cost Sharing must be allocated.	Error	Fix It
Warnings			
Project Personnel Budget Period 1	Earning Period Start Date is before Victoria Mastin Guadarrama's Salary Effective Date. Salary is calculated based on Effective Date.	Warnings	Fix It

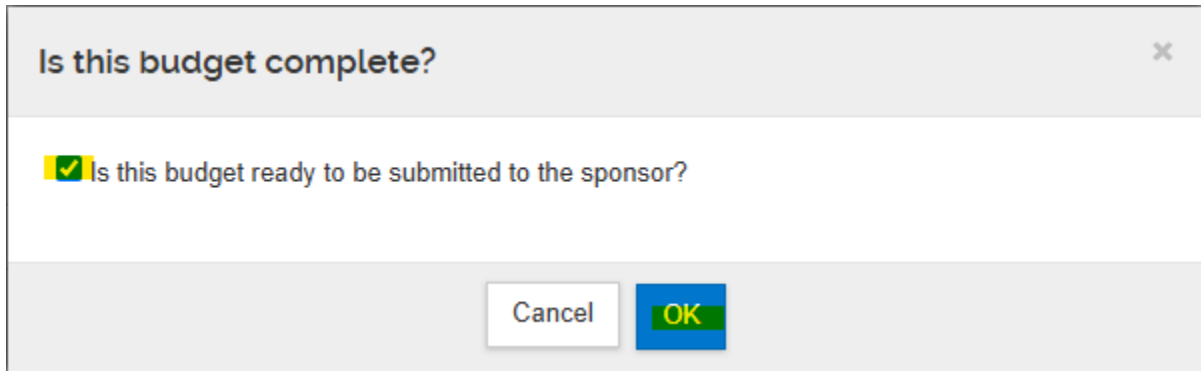
Showing 1 to 2 of 2 entries [Previous](#) [Next](#)

Close

Step 14: Review and Complete Budget

Open the **Budget Summary** panel to review all budget categories and calculations. Once satisfied, select **Complete Budget**.

You will be asked to certify that the budget is complete and ready to be submitted to the sponsor.



Certify by checking the box and select **Ok**. Once redirected to Budget, select **Return to Proposal**. If you select **Close**, you will be redirected to the dashboard.

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Proposal #15411 > Budget #3

Budget #3: Budget Number One

Marked For Submission: Yes
 02/03/2025
 Created: #15411
 Proposal: more...

[Data Validation \(off\)](#) [Budget Settings](#) [Summary](#) [Budget Versions](#) [Help](#)

	P1 (01/01/2026 - 12/31/2026)	P2 (01/01/2027 - 12/31/2027)	P3 (01/01/2028 - 12/31/2028)	P4 (01/01/2029 - 01/09/2029)	Totals
Personnel					
> Salary	\$862,750.00	\$888,632.50	\$915,291.48	\$22,471.39	\$2,689,145.37
> Fringe	\$310,946.50	\$323,827.12	\$337,041.58	\$8,317.06	\$980,132.26
Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Personnel Subtotal	\$1,173,696.50	\$1,212,459.62	\$1,252,333.06	\$30,788.45	\$3,669,277.63
Non-personnel					
> Travel	\$15,000.00	\$15,450.00	\$15,913.50	\$16,390.91	\$62,754.41
> Other Direct	\$20,000.00	\$20,600.00	\$21,218.00	\$21,854.54	\$83,672.54
Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Non-personnel Subtotal	\$35,000.00	\$36,050.00	\$37,131.50	\$38,245.45	\$146,426.95
Totals					
Total Direct Cost	\$1,208,696.50	\$1,248,509.62	\$1,289,464.56	\$69,033.90	\$3,815,704.58
Total F&A Costs	\$336,017.63	\$347,085.68	\$358,471.15	\$19,191.43	\$1,060,765.89
Totals Subtotal	\$1,544,714.13	\$1,595,595.30	\$1,647,935.71	\$88,225.33	\$4,876,470.47

Back Close

Next Steps:

After completing the budget, you will have all the necessary information to prepare your **Budget Justification**. This document is required for all USU proposals and must be submitted with your **Proposal** under the **Attachments** tab.

To make changes to your budget after marking it complete navigate to the proposal screen and select the Budget tab. Find the completed budget, and in the **Actions** column select the Actions drop down. From the list select, **Mark Budget Incomplete**.

Kuali Research

Development

Proposal: #15707
Aria Mastin Guadarrama

Document Info
Doc Nbr: 382039
S2S Connected: No
Initiator: a02250411
Status: In Progress
[more...](#)

Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

Budget

Document was successfully saved.

Budgets

The following budgets are linked to this proposal.

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
The Budget (for submission)	1	3,026,712.19	454,006.87	3,480,719.06	02/01/2025	01/31/2029	Complete		Action▼ View Summary Copy Print Mark Budget Incomplete Remove from Submission

Back Save Save and Continue Close

An additional question box will ask you to confirm marking it incomplete. Once confirmed, you will be able to enter and edit the Budget.