

Overview

The **Kuali Coeus (KC) Budget** module is a robust tool for building detailed budgets. Whether you're preparing a proposal budget for a sponsor with a set maximum allowable direct cost per project period, or an annual limit on total costs specified by the PI, a **KC Detailed Budget** has a feature that provides the ability to **sync a non-personnel cost to the project period's Direct Cost Limit or Cost Limit**, ensuring costs do not exceed limits set for a KC project period.

Procedure

Enter a Cost Limit or Direct Cost Limit

1. While in a Detailed Budget, click **Periods & Totals** from the left navigation menu.
2. Manually enter either a **Cost Limit** (Direct Costs and calculated Indirect/F&A Costs) or **Direct Cost Limit** per project period.

Periods & Totals										
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
09/01/2026	08/31/2027	12.0	0.00	0.00	0.00	0.00	0.00	250,000.00	0.00	
09/01/2027	08/31/2028	12.0	0.00	0.00	0.00	0.00	0.00	250,000.00	0.00	
Total:			Total:	Total:	Total:	Total:	Total:	Total:	Total:	Total:
			24.00	0.00	0.00	0.00	0.00	500,000.00	0.00	

Note: A red box highlights the 'Cost Limit' and 'Direct Cost Limit' columns for both periods, with a callout 'Manually enter per project period' pointing to the values.

Enter Personnel and Non-Personnel Costs

1. Enter Personnel and Non-Personnel costs to the budget. If the costs exceed the **Cost Limit** or **Direct Cost Limit** entered for a project period, a Warning will display.

This page has 2 warnings

- The Period 1 Cost Limit has been exceeded.
- The Period 2 Cost Limit has been exceeded.

Sync Total Cost/Direct Cost Limit from a Non Personnel Cost

1. Under **Non-Personnel Costs**, click the **Details** button on the right side of a cost.

Other Direct			
Materials and Services		20,000.00	Details

Note: A red arrow points to the 'Details' button.

2. Click either the **Sync To Period Cost Limit** or **Sync To Period Direct Cost Limit** button.

The screenshot shows the 'Edit Assigned Non-Personnel' form with the following details:

- Start Date:** 09/01/2026
- End Date:** 08/31/2027
- Category Type:** Other Direct
- Category:** Materials
- Object Code Name:** Materials and Services
- Total Base Cost:** 20,000.00
- Quantity:** (empty)
- Description:** (empty)

Inflation Rates Table:

Description	Start Date	Institution Rate	Applicable Rate
Materials and Services	07/01/2027	3.00	3.00
Materials and Services	07/01/2026	3.00	3.00

Apply Inflation:
Submit cost sharing:
On Campus:

Buttons at the bottom: **Save Changes**, **Save And Apply To Other Periods**, **Sync To Period Direct Cost Limit**, **Sync To Period Cost Limit** (highlighted with a red box and an arrow), and **Cancel**.

3. When prompted if you want to sync to the cost limit, click the **Yes** button.

4. Click the **Save Changes** button.

The screenshot shows the 'Edit Assigned Non-Personnel' form with a 'Please Select' dialog box overlaid. The dialog box contains the following text:

Please Select

Period total cost is greater than the cost limit for this period. Do you want to reduce this line item cost to make the period total cost the same as the period cost limit?

Buttons in the dialog: **No** and **Yes** (highlighted with a red arrow).

The background form is the same as in the previous screenshot, but the **Save Changes** button is now highlighted with a red box and an arrow.

5. Repeat for each project period, as needed.

View Periods & Totals

1. Click **Periods & Totals** from the left navigation menu.
2. View to confirm the **Total Sponsor Cost** aligns with the **Cost Limit** entered or **Direct Cost** aligns with **Direct Cost Limit** entered per project period.

Periods & Totals											Recalculate with changes	Reset to period defaults
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		
09/01/2026	08/31/2027	12.0	250,000.00	168,037.68	81,962.32	0.00	0.00	250,000.00	0.00			
09/01/2027	08/31/2028	12.0	250,000.00	168,037.68	81,962.32	0.00	0.00	250,000.00	0.00			
		Total:	Total:	Total:	Total:	Total:	Total:	Total:	Total:			
		24.00	500,000.00	336,075.36	163,924.64	0.00	0.00	500,000.00	0.00			

Getting Help

For questions regarding Quali Coeus Quick Reference Cards, email the Support Team at ra-help@mit.edu.