



# Welcome!

Log in to KC via:

- Username & Password found on your Log In Sheet

The screenshot shows the KC KUALI COEUS login interface. At the top left is the MIT logo, and at the top right is the KC KUALI COEUS logo. Below the logos is a horizontal line, followed by the text "Welcome to Kuali Coeus: Advanced Budget Topics Training!". Below this is the text "Here is some information you will need for the class." followed by a navigation bar with links for HOME, DASHBOARD, MAINTENANCE, and SYSTEM ADMIN PORTAL. Below the navigation bar is a search bar with the text "kc6011-s16-20150330-0046" and links for "Doc Search", "Action List", and "GET HELP". The main content area features a "Login" form with two input fields: "UserName:" and "Password:". Both input fields are highlighted in yellow, and red arrows point to them from the left. Below the input fields is a blue "Login" button. To the left of the login form, there is a yellow box with the text "To log-in to KC use the following:" followed by "Username: user01" and "Password: user01". Red arrows point from the text "user01" to the corresponding input fields in the login form.



# Advanced Budget Topics

KC Hands-On Training



Learn how to:

- Utilize some of the advanced budget functions available in Kuali Coeus.
- Enter some of the more complex budgets with unusual requests.



## The session will cover:

- Modifying F&A Rate Type & On/Off Campus Settings
- Modifying Budget Rates
- Adjusting Budget Period Boundaries
- Using 'Groups'
- Applying Cost Elements to Later Periods
- Setting Total Cost Limits
- Setting Total & Direct Cost Limits per Project Period
- Syncing to Period Cost Limits
- Distributing Cost Sharing & Underrecovery
- Proposal Hierarchy: Creating Parent Proposal, Linking, Syncing Changes & Unlinking
- Salary Cap
- Uploading Subaward Budgets
- Creating Modular Budget Based on KC Detailed Budget



The training will be divided into two main exercise scenarios:

1. Proposal Hierarchy Scenario
  - a) Creating Child Proposals
  - b) Creating Parent
  - c) Linking
  - d) Syncing
2. Modular Budget Scenario



# Creating Child Proposals

*(while using some of the advanced budget functions in KC)*



## Proposal Hierarchy Scenario:

- PI and Investigator are **each** creating their **own** budget.
- The sponsor has asked that the budget be presented in **Government Fiscal Years** (10/01 – 09/30).

We will create a Proposal Hierarchy combining the Budgets for Edward Haskell (Proposal – Child 1) and Theodore Cleaver (Proposal – Child 2)

<b>Proposal Project Period:</b>	<b>June 01, 2016 – May 31, 2018</b>
<b>F&amp;A Rate:</b>	20% of TDC 'On Campus' 10 % of TDC 'Off Campus'
<b>Total Budget Not to Exceed Total Cost Limit:</b>	\$400,000
<b>Following individuals are involved:</b>	<b>Budget 1</b> PI: <u>Edward Haskell</u> Key Person: <u>Judith Hensler</u> (No Salary Inflation) Unit: Center for KC Training – Lead Department Total Cost Limit: \$275,000 Includes 1 TBA – Post Doc
	<b>Budget 2</b> Co-Investigator: <u>Theodore Cleaver</u> Unit: Center for KC Training Total Cost Limit: \$125,000 Taking place entirely "Off Campus" Includes 1 TBA, Res Asst Mst



# Creating Proposal Hierarchy





- Proposal Hierarchy combines multiple budgets to submit as one.
- A hierarchy consists of two levels:
  - one parent proposal, and
  - **one** or **more** child proposals
- The **parent is created from a child proposal**, and then other child proposals are linked to the hierarchy.
  - Before you create the parent proposal, decide which child proposal you will use to create it.
- The resulting group is submitted as a single proposal.

- Multiple Units or PIs / Investigators
- Combination of F&A Rate Variations
- Phased or Tasked Projects
- Optional Budget Periods
- Preparation for Post Award Accounts
- Delegate preparation to different users

- **Child** proposals are used for budgets and proposal personnel information (biosketch, current and pending, etc.).
- Certify the investigator(s) and answer the Questionnaires in the **parent**.
- The proposal hierarchy will only be two levels: the top level – parent proposal – and second level – children.
  - For routing and master data, KC will always reference the parent (top level) proposal as the official version.
- The PD/PI Contact of the child proposal that created the parent is automatically the lead PI of the parent proposal and the hierarchy.



# Modular Budget

## Modular Budget Scenario:

- Preparing an R01 proposal to the NIH for a 3 year Project.
- You prepared Budget Version 1 but the PI has decided to make the following changes to the Proposal/Budget:
  - The Project Period should now to be 07/01/2016 - 06/30/2019
  - A Subcontract from Harvard Medical School has been added with Violet Rutherford as the Subaward Investigator
  - A Co-Investigator (Theodore Cleaver) has been added at 100% effort during July & August months. His base salary is above the NIH Cap
  - Finally, the PI would like to see the final budget in a detailed and a **modular budget format**

*“Modular budgets are applicable to certain research grant applications from domestic organizations requesting \$250,000 or less per year for direct costs. Note, consortium/contractual F&A costs are not factored into the direct cost limit. Consortium F&A costs may be requested in addition to the \$250,000 limit. Modular budgets are simplified; therefore, detailed categorical information is not to be submitted with the application. The modular budget is applicable only to R01, R03, R15, R21, and R34 applications”*

– SF424 (R&R) Application Guide for NIH and Other PHS Agencies

- Used exclusively by NIH.
- Rather than submitting a detailed, line item budget to NIH, the application includes a budget that is build in **\$25,000 modules**.
- Has a **direct cost limit of \$250,000 per period** (less consortium F&A).
- A typical Modular Budget does not include any future period escalation in costs and **requests the same number of modules in each year**.
- Following types of **Modular Budget Justifications** may be required with the submission:
  - Personnel Justification
  - Consortium Justification
  - Additional Narrative Justification

KC has the ability to build the Modular Budget from the Detailed Budget entered in KC.

To Create a Modular Budget based on a Detailed Budget created in KC:

- Set Direct Cost Limits in each Project Period (in applicable Modular Budget Modules plus applicable Subcontract F&A)
- Sync a Non-Personnel Cost Element to the set Direct Costs Limit in each Budget Period
- Create the Modular Budget



