Overview:

This proposal type allows users to calculate revised budgets requested by the sponsor and/or provide updated project scope documents for internal and external use. By capturing this information in KR PD, we can update our institutional proposal information for more accurate reporting, as well as have more accurate information to use at the time an award is received.

Procedure:

1. Use search to find the original proposal.
2. Click medusa in the Actions column
3. In the lightbox that opens, drag your cursor over the IP number to copy it (Ctrl +C)
4. Close the lightbox.
5. In the Actions column for the original proposal, choose copy.

This will open the Copy lightbox.
- Choose the correct Lead Unit.
- Check the box to copy the Budget
  - Choose ‘for submission version’ to base changes on the version submitted with the original proposal.
  - Choose ‘all versions’ if there is an alternate version in the original proposal you want to base changes on.
- Check the box to copy all Attachments (best practice)
- The Questionnaire box is checked by default. Leave it checked (best practice).
  - If you need to change an answer, you can clear the questionnaire(s) in the copied proposal.
- Click Copy button at the bottom of the lightbox.
This will open a new Proposal Development document, with a new Proposal number.

In the new proposal, change the **Proposal Type** to **Budget-SoW Update**:
Once the Proposal Type is changed, the field for **Original Institutional Proposal ID** will appear.

Paste the IP number that was copied earlier into this field:

```
Proposal Type: * Budget-SOW Update

Lead Unit: CO-2002 - Sponsored Programs
Activity Type: * Research
Project Dates: * 02/01/2017
Project Title: * Supporting Healthy Aging with a Phytochemical Combination that Acts at

Sponsor: * 102032
Prime Sponsor Code: 
Award ID: 

Original Institutional Proposal ID: Ctl+V to paste IP number here
```

Make other changes to Proposal data as needed.

Once all changes have been made in the proposal, contact OSP to coordinate the review and routing. This proposal type follows standard routing rules.

**NOTE:** If you have to change proposal start/end dates for the update, there are additional steps needed to align budget start/end dates, applicable F&A/fringe rates, and salary effective dates with the new proposal period.

Any/all Budget version(s) in the copied proposal will be in “Incomplete” status. Open a version to edit. (You can also copy it to a new version, or add a completely new budget version.)

**If the proposal (project) start/end dates have been changed:**

In an existing budget version, the budget dates must be sync’d to proposal dates **before** any edits are made.

**To update budget period start/end dates**

Open the budget version to be used for the update. The budget will open on the **Periods & Totals** page.
Changes to start/end dates can affect applicable F&A and fringe rates.

To sync rates to the new project period:
- In the open budget version, click Rates in the left navigation menu.
- Use the sync buttons as desired to update the rates.
- Click ‘Yes’ to the question about recalculation.

In most cases, an update of project start/end dates will move dates into the future relative to the original proposal. The existing Salary Effective dates for project personnel in this case should not be a problem for budget calculations.

However, if the start date in the copied proposal is prior to the start date of the original, the Salary Effective dates for all Project Personnel must be manually updated to match the new proposal start date so that salaries will calculate correctly.

To update Salary Effective Dates:
1. Go to Project Personnel section.
2. Click the Details button for each person.
3. Enter the new start date in the Salary Effective Date field.
4. Click Save Changes.