

## Budget Revisions in UFIRST

DSP strongly recommends completing all budget revisions in the Proposal record, even if the revision is taking place at time of award.

Budget revision requests occur for a variety of reasons; a sponsor may elect to fund some but not all of the proposed specific aims or tasks, or they may have funding limitations that necessitate an overall reduction. Whatever the reason may be, a sponsor has requested a revised budget and the PI, Department, and DSP must coordinate the transmittal of this information.

If the PI or Department receives a budget revision request, complete the following steps:

### Steps

1. Locate the proposal in need of a budget revision in UFIRST. From its Proposal Workspace execute the **Initiate Budget Revision** activity.



Initiate Budget Revision

2. The **Initiate Budget Revision** pop-up window will appear. If you are ready to begin revising the budget, click **OK**.

#### Initiate Budget Revision

#### Initiate Budget Revision

By clicking OK, this proposal will transition to the Budget Revisions state. The proposal team will then have access to edit the budget SmartForms in order to make post submission changes.

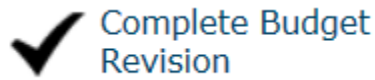
OK

Cancel

3. At this time the state of the Proposal will transition to **Budget Revisions**, indicating that the budget grids are available for updating or for the creation of project budgets.

Budget Revisions

4. Once all budget revisions are complete, execute the **Complete Budget Revision** activity



5. The Complete Budget Revision pop-up window will appear.

**Complete Budget Revision**

**Complete Budget Revision**

\* **1.0 Route completed budget revisions to DSP for review:**  
 Yes  No [Clear](#)

**2.0 Comments:**

**3.0 Attachments:**

Name
There are no items to display

By clicking OK, you are indicating the budget revisions are complete. The proposal team will no longer have access to edit the budget SmartForm

### 5.1. Route completed budget revision to DSP for review:

5.1.1 Select **Yes** if this is a budget revision taking place before the issuance of an award. This indicates that the budget revision is a sponsor-requested Just-in-time request and DSP should review the updated budget before it is submitted to the sponsor.

DSP will review the revisions. Please note that if significant budget changes are requested or new cost sharing commitments are being included (e.g. a key person's salary recovery has been reduced but their effort has not been revised, or a key person has reduced their effort by more than 25%), DSP will require that the Submitting Department secure Ad Hoc Review Request(s) and Approval(s) from the appropriate approver(s) for the responsible Unit(s).

Once DSP and any necessary Ad Hoc reviews are complete, DSP will execute the Complete **Post Submission Request** activity. This will be completed once the DSP contact has submitted the requested documents back to the sponsor.

5.1.2 **Route completed budget revision to DSP for review:** Select **No** if this budget revision is not required to be submitted to the Sponsor (i.e. the award has arrived and you are preparing for importing the proposal budget to UFIRST Awards).

5.2 **Comments:** Provide any information that would be helpful in the review of this budget revision.

5.3 **Attachments:** Attach any documents that need to be submitted to the sponsor or any helpful information.

Once this pop-up window is complete, click **OK**.

6. Depending upon certain conditions the Proposal will transition to different states.

- a. If the budget revision was completed as a sponsor requested, post-submission or JIT item, and the revision was routed to DSP for review, DSP will review and transition the Proposal out of the revision state. Once this is done, the Proposal will transition back to **Pending Sponsor Review**.



Pending Sponsor Review

- b. If an Award was created from the Proposal while the Proposal was still in the **Budget Revisions** state, the Proposal will transition to the **Award Pending** state upon completion of budget revisions.



Award Pending