

Budget Revisions in UFIRST

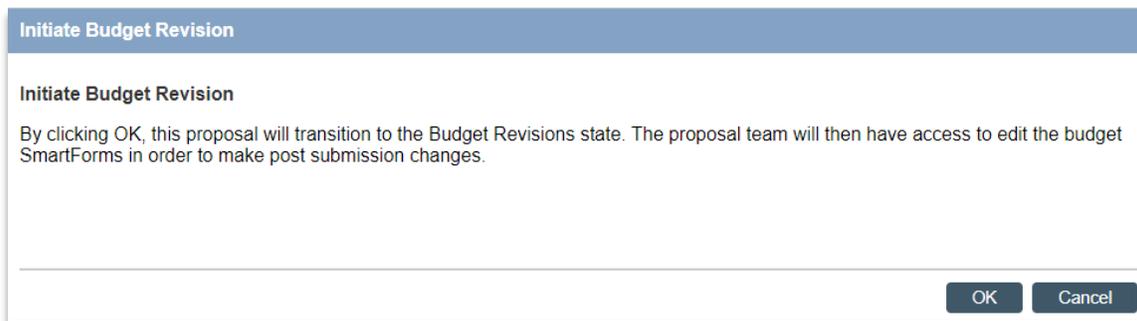
Use the “Initiate Budget Revision” activity to make adjustments to the UFIRST budget grids, including budget periods, after a proposal has been submitted to the sponsor. This activity is available once a proposal is in “Pending Sponsor Review” state.

UFIRST Procedure

1. **Click** the “Initiate Budget Revision” activity.



A pop-up window will appear. **Click** “OK”.



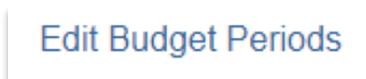
The Proposal will transition to “Budget Revisions” state.



2. Complete adjustments to the budget grids as needed.
 - a. To create additional project budgets, **click** the “Create Additional Budget” activity in the Proposal workspace.



- b. To make changes to the budget periods, **click** the “Edit Budget Periods” button in the Proposal workspace.



3. If the budget changes require Unit approval per <https://research.ufl.edu/dsp/proposals/revisions-to-proposals-prior-to-submission.html>, **request** Ad Hoc Review approval and **confirm** approval is received.
4. Once all budget revisions and any required approvals are complete, **click** the “Complete Budget Revision” activity.



A pop-up window will appear. **Click** “Yes” if the budget revision should be routed to Core Office for review. Select this option if the revised budget is being submitted to the sponsor or Unit approval is required as detailed above. **Attach** all required documents including a copy of the sponsor’s request and the revised budget document to be submitted. **Enter** a description of the request in the “Comments” field, including what information needs to be submitted, to whom, and by what method.

Complete Budget Revision

Complete Budget Revision

* 1.0 Route completed budget revisions to the Core Office for review:
 Yes No [Clear](#)

Comments:

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

Click “No” if the revised budget does not need to be submitted to the sponsor and Unit approval is not required as detailed above. In this case, the Unit may update the Proposal record for convenience (i.e., the Notice of Award has arrived, and the unit is preparing to import the Proposal budget into the UFIRST Award record).

5. **Click** the OK button. If routing the Budget Revision to DSP, the Proposal transitions to “Core Office Review: Post Submission Updates” state and alerts DSP that the record is ready for review, approval, and submission to the sponsor. If the Budget Revision is not routed to DSP, the Proposal transitions to “Pending Sponsor Review” state and DSP is not alerted.