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”.

   ![Initiate Budget Revision](image1)

   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.

      ![Create Additional Budget](image2)

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

      ![Edit Budget Periods](image3)
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.
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 the 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.