

Overview:

Describes how to change rates for a proposal budget version.

Note: Rates that can be modified are F&A, Inflation, and Fringe Benefits.

Procedure:

Modifying Proposal Rates – Detailed Instructions

To be sure the budget is using the most up-to-date indirect, employee benefit, and inflation rates, synchronize (Sync) the **Proposal Rates** table to the **Institute Rates** table.

If using a copied proposal, **this action is imperative**; a newly generated proposal's rates will use the current system information, but a copied proposal may *have old rates* that require synchronizing.

NOTE: Changing the rates applies only to the current budget version. If this budget version is copied, the modified rates will also copy. A new budget version will use the system default rates.

To Review/Modify Proposal Rates:

1. While in the Budget, click the **Rates** panel in the **left navigation** panel.
2. The **Rates** screen will open displaying three tabs across the top: **F&A**, **Fringe Benefits** and **Inflation** with the default display of **F&A** tab. (**NOTE:** *The type of F&A rate is determined by the **Activity Type** chosen for the proposal when the record was created.*)

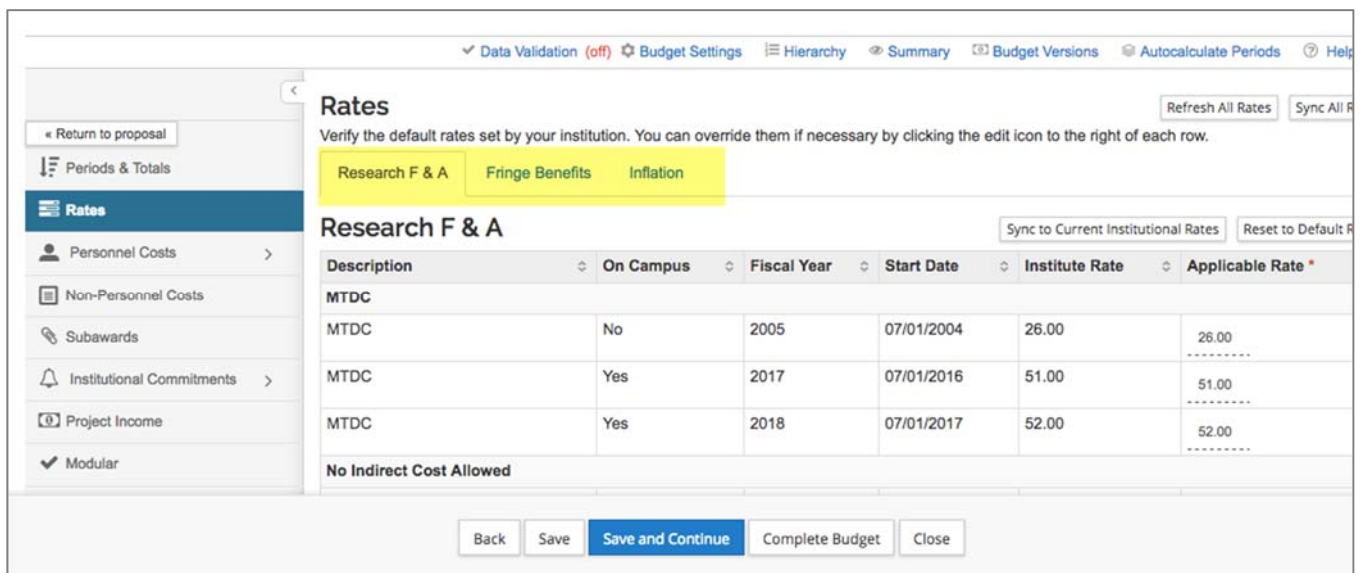


Figure 1 – Rates Panel

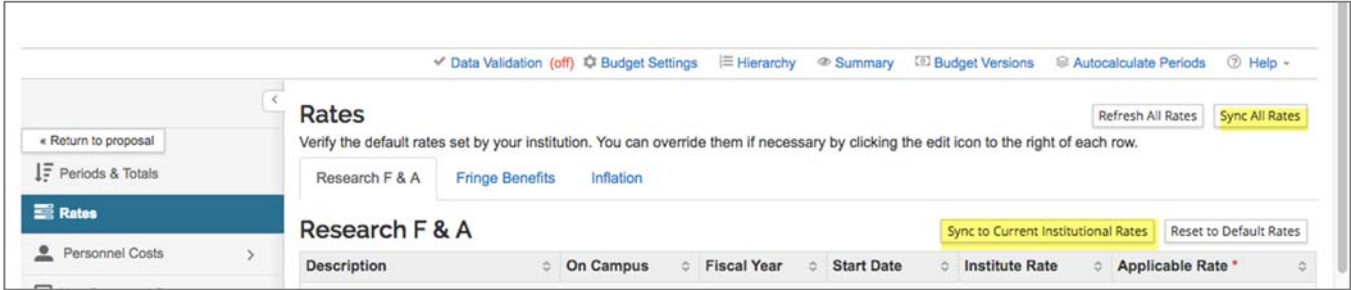


Figure 2 – Syncing Buttons

- Click the tab for the rates you want to modify (e.g. Research F&A) and then click on the rate you want to modify in the **Applicable Rate** column. The **Rate** field will become editable. (The Institute Rate column is read-only.)

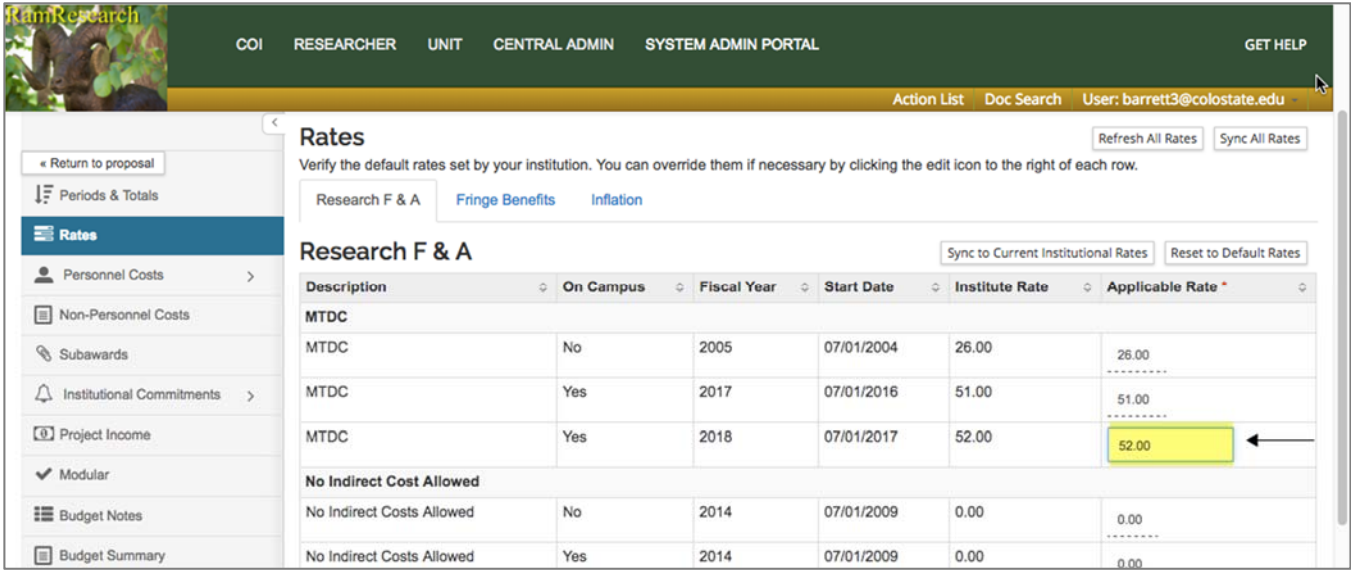


Figure 3 – Modifying Rates

- Enter the rate to be applied to the Proposal in the **Applicable Rate** field.
- NOTE:** Rates are applied by Fiscal Year, with separate lines for on and off campus rates.
- Repeat these steps to modify all the needed rates.
 - Click the **Save** button.

NOTE: For copied proposals, or to re-set the rates for a budget version, Kuali Research allows you to synchronize (sync) your proposal rate table (applicable rates) to the

institute rate table by clicking the [Sync to Current Institutional Rates](#) or the [Sync All Rates](#) buttons in the **Rates** panel.

Here are details for these buttons:

Sync to Current Institutional Rates – Sets this budget to the current default institutional rates. This is required when copying an old proposal from a prior fiscal year to a new proposal. This sync function will insure that the rates are for the current fiscal year. Using this feature overrides any data entered in the fields for 'applicable rate'.

Sync All Rates - Re-sets all rate sections to match Institutional rates.

Refresh All Rates – Re-sets all values entered in 'applicable rate' fields to match the rates listed in the 'institute rate' fields, within all the rates sections. Different from sync, because it doesn't bring in current institutional rates.

Reset to Default Rates – This function erases any data entered in 'applicable rate' fields, re-setting the rates back to the default institutional rates.