

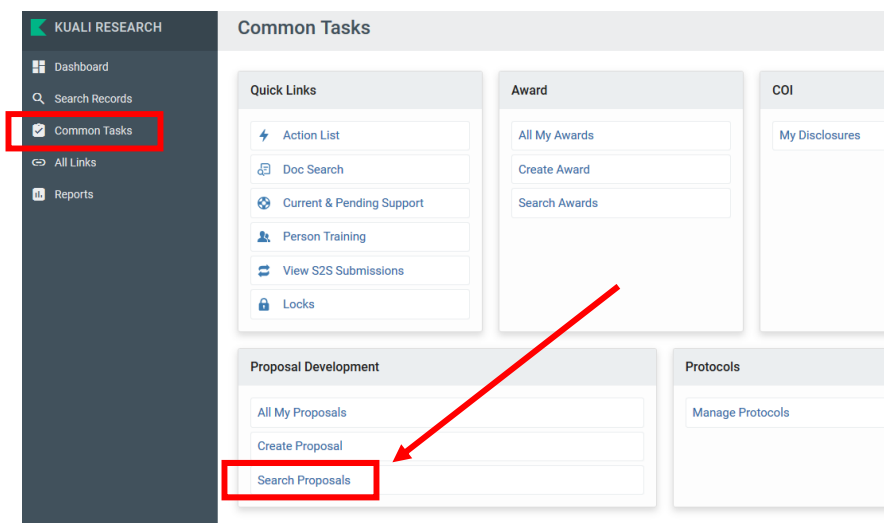
Approving an Application in KualI

October 2021

Purpose: To understand the process for approving an application in the KualI Proposal Development module.

You can approve proposals through an email link sent via the KualI system, by using your Dashboard in KualI or by searching directly for the proposal.

1. When a proposal has been submitted into routing, all people identified as needing to approve the application (PI and Multiple PI (if applicable), PI's Chair and Dean, other Key Personnel's Chair and Dean, and others as applicable) will receive an email generated from the KualI system alerting you to the need for action on a proposal. Click directly on the link in the email and it will take you to the proposal summary screen (image below). You can navigate through the tabs (**Proposal Summary, Personnel, Compliance, Attachments, etc.**) to see the application information.
2. To approve by searching directly, enter "search proposals" in the Proposal Development card on the main KualI Common Tasks screen.

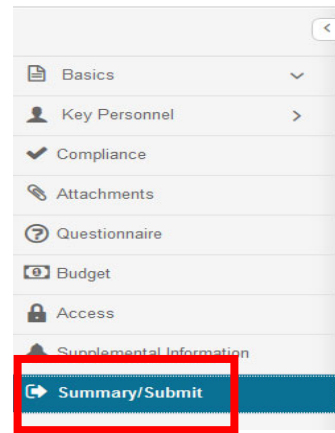


Next, enter search criteria, limit your search to only one data element (proposal number or last name of PI work well).

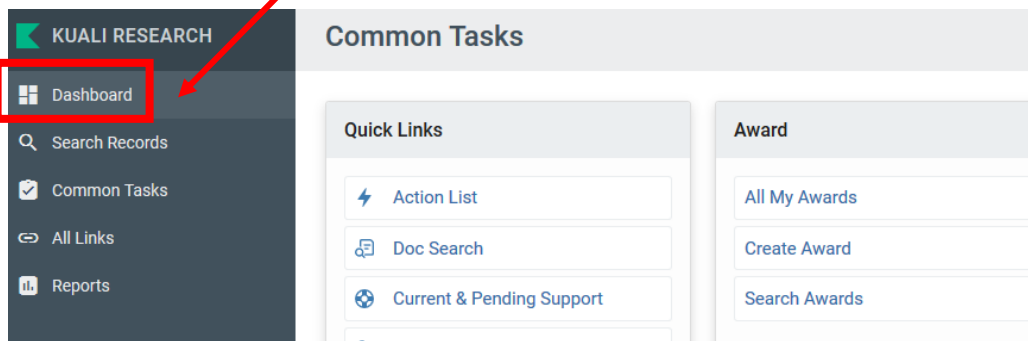
Development Proposal Lookup

Proposal Number:	<input type="text"/>
Proposal Type:	select <input type="button" value="v"/>
Proposal State:	select <input type="button" value="v"/>
Project Title:	<input type="text"/>
Proposal Person:	<input type="text"/> <input type="button" value="x"/> <input type="button" value="q"/>
Principal Investigator:	<input type="text"/> <input type="button" value="x"/> <input type="button" value="q"/>

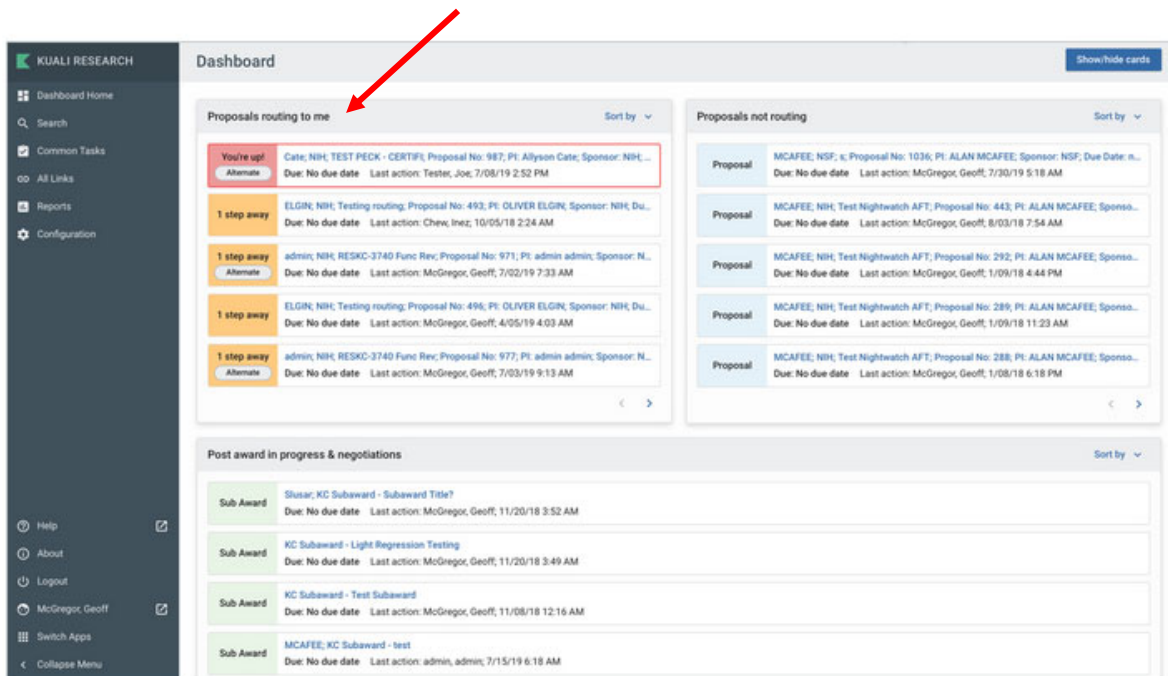
Click ENTER or “search” at the bottom of the screen. Search results appear at the bottom of the page, find the proposal you are looking for and click “view.” The proposal will open and you will need to go to the “summary/submit” screen, which can be found using the navigation panel on the left side of the screen



3. To approve using the Dashboard to find a proposal, from the Kuali Common Tasks screen, click on DASHBOARD in the upper left corner.



From the Dashboard screen, go to the Proposals Routing to Me card, which should be the first card on the page.



Locate the proposal that needs your approval – proposals awaiting your immediate approval will appear with a RED “You’re Up” label next to them. You can click on the row in the card to open the record and take the necessary action – the proposal will open in the summary/submit screen for that particular application.

Proposals routing to me Sort by ▾

- You're up!** Alternate Proposal #1436 – PI: POND, MITZI – Sponsor: NIH – Title: cost share routing test – Lead unit: IN-C...
Due date: None Last action: Administrator, Application; 6/16/20 9:51 AM
- You're up!** Alternate Proposal #1439 – PI: Tester, Joe – Sponsor: NIH – Title: NEW NIH FormsF test R01 s... – Lead unit...
Due date: None Last action: McGregor, Geoff; 6/16/20 11:14 AM Compliance
- You're up!** Alternate Proposal #1453 – PI: MARTIN, AUDREY – Sponsor: NIH – Title: Phoenician Shipping Vesse... – Le...
Due date: None Last action: McGregor, Geoff; 7/21/20 8:03 PM Compliance
- You're up!** Alternate Proposal #1467 – PI: Cate, Allyson – Sponsor: NASA - Washington – Title: test 424a PECK – Lead ...
Due date: None Last action: McGregor, Geoff; 7/07/20 5:25 PM
- 1 step away** Alternate Proposal #971 – PI: admin, admin – Sponsor: NIH – Title: RESKC-3740 Func Review – Lead unit: L...
Due date: None Last action: McGregor, Geoff; 7/02/19 2:33 PM

6-10 of 176 < >

4. Review and Approve from the SUMMARY/SUBMIT SCREEN:

Proposal Summary **Personnel** Credit Allocation Questionnaire Compliance Attachments Supplemental Info Keywords Budget Summary

Proposal Summary

Title	Credit Split Test
Principal Investigator	Erin Folstad
Lead Unit	385 - Research and Sponsored Programs
Proposal Type	New
Activity Type	Research
Proposal Number	1218
Project Start Date	01/01/2022
Project End Date	12/31/2022
Include Subaward(s)?	No
Sponsor Name	American Heart Association
Prime Sponsor Name	
Sponsor Deadline Date	10/31/2021
Sponsor Deadline Type	

Submit for Review Ad Hoc Recipients View Route Log Cancel proposal Delete Proposal More Actions ▾ Close

Key personnel and credit split distributions can be found under the **Personnel** and **Credit Allocation** tabs. Please review to make sure the key personnel are identified correctly and that associated allocation and recognition percentages are in line with the work being proposed. The PI is responsible for entering the information at the time of application. All PIs and Co-Is will be required to certify that the information in the application is true and correct. Chairs, Deans and other approvers should review the credit split distribution as part of the approval process. The distributions entered at the time of application will carry through to any awards made and should be averaged across years for multiyear projects.

Proposal Summary **Personnel** **Credit Allocation** Questionnaire Compliance Attachments Supplemental Info Keywords Budget Summary

Credit Allocation

	Allocation	Recognition
Erin Folstad	60	60
10023 - Center for the Advancement of the Humanities	25	25
385 - Research and Sponsored Programs	75	75
Unit Total:	100	100

The proposal documents (narrative, budget justification, facilities, etc.) will be found under the **Attachments** tab. Within the Attachments tab, documents will be uploaded to one of three tabs, Proposal, Personnel and/or Internal. For system to system applications (to federal sponsors submitted through grants.gov), the documents will be found under the **Proposal** and **Personnel** tabs. For all other applications, the documents will be found under the **Internal** tab. Click on the File name to view the document.

Internal (1)

File	Type *	Status	Description	Uploaded By	Posted Timestamp
1 All Application Documents - Demo.pdf	Other	Complete	All application documents being submitted to the sponsor.	Folstad, Erin	02/16/2018 11:38 AM

Any commitments being made on behalf of the department or college or special considerations for the project can be found under the **Supplemental Info** tab.

A summary of the proposed budget for the project can be found under the Budget Summary tab.

Cost Sharing Amount: 0.00		Underrecovery Amount: 0.00	
Program Income: 0.00		F&A Rate Type: MTDC	
	P1(03/01/2018 - 02/28/2019)	Totals	
Personnel			
> Salary	\$2,540.93	\$2,540.93	
> Fringe	\$724.17	\$724.17	
Calculated Direct Costs	\$0.00	\$0.00	
Personnel Subtotal	\$3,265.10	\$3,265.10	
Non-personnel			
> Travel	\$250.00	\$250.00	
> Other Direct	\$1,000.00	\$1,000.00	
Calculated Direct Costs	\$0.00	\$0.00	
Non-personnel Subtotal	\$1,250.00	\$1,250.00	
Totals			
Total Direct Cost	\$4,515.10	\$4,515.10	
Total F&A Costs	\$2,302.70	\$2,302.70	
Totals Subtotal	\$6,817.80	\$6,817.80	

Following review of the proposal, you can either approve the application or return it. To approve, simply click the **Approve** button (Blue below). To request modifications, click the **Return** button (Red below), enter a comment and the proposal will route back to ORSP for changes. The proposal will then be re-routed for approval following modifications. All individuals who have previously approved will need to do so again. The **View Route Log** button (Green below) shows where in the routing/approval process the proposal currently is and what other actions have been taken.

Proposal Summary Personnel Credit Allocation Questionnaire Compliance Attachments Supplemental Info Keywords Budget Summary

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Sponsor Name	American Heart Association
Prime Sponsor Name	
Sponsor Deadline Date	10/31/2021
Sponsor Deadline Type	

Principal Investigator (PI) and/or Multiple PI: Your approval indicates that you have read and approved the application or proposal, budget, and commitments made therein. Chair(s): Your approval indicates that you approve the proposed activity, department personnel, and department commitments. Dean(s): Your approval indicates that you approve the proposed activity, college or school personnel, and college or school commitments."

[Send Adhoc](#) [Ad Hoc Recipients](#) [Approve](#) [Return](#) [View Route Log](#) [Recall](#) [More Actions](#) [Close](#)