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Kuali Proposal Development Module

Creating and Submitting the Initial Proposal (Routing Packet) for a Project

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General Instructions

a) Creating a proposal in Kuali is the electronic equivalent of preparing a routing package.



- c) The overall Proposal form has multiple sections or panels that are listed as a menu on the left-hand side of the page. You may navigate to different panels of the form by clicking on individual menu items.
- d) This instructional document is similarly organized by individual sections/panels identified at the top of each page. On any given page, each illustration references the steps immediately above it.
- e) It is not possible to incorporate all relevant information into this one instructional document. All pages of the Proposal form have a **Help** tab at the top-right corner of the page which contains individual links to more detailed instructions for completing each panel or sub-panel of the form. Please use this resource until you are fully familiar with the module.
- f) The system saves your work automatically but almost all pages have a Save button for saving entries manually.
- g) Entries into certain fields are made by searching various Kuali databases (people, institutions, sponsors, keywords, etc.) and selecting among the retrieved items. For optimal results, when searching, always bracket your search term by asterisks. For example, if one of the Ochsner campuses is a performance site for a clinical trial, search for *Ochsner* or *ochs* instead of Ochsner or ochs.
- *h)* Please disregard some discrepancies between figures (e.g., different proposal numbers. This document was developed over the course of creating multiple proposals across multiple form versions.
- i) If you encounter any problems in creating a proposal, please contact the Office of Grants & Contracts (OGC) at <u>grants-NO@lsuhsc.edu</u>.



Preliminary Steps

- 1. Log into Kuali:
 - LSUHSC Personnel (individuals with an active @lsuhsc.edu email address): <u>https://lsuhsc.kuali.co/cor/main/#/apps</u>.



- Non-LSUHSC Personnel (individuals without an active @lsuhsc.edu email address): https://lsuhsc.kuali.co/auth/kuali.
- 2. Click Research Home.

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		Research Home	Conflict of Interest	Protocols	
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III Switch Apps	Community.	Users	Groups		
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3. From your Dashboard click Common Tasks.

KUALI RESEARCH	Dashboard			Show/hide cards
Dashboard	Provide the large			
Q, Search Records	Proposals routing to me	▼ Filter Sort by ~	Proposals no	t routing Tilter Sort by ~
 Common Tasks GD All Links 		othy – Sponsor: AIDS Malignancy Cons tion: 3/09/2021 11:24 Compliance	Proposal	Proposal #1 – PI: admin, admin – Sponsor: NIH – Title: Demo – Lead Due date: 12/20/2019 Last action: 11/25/2019 10:11 AM
 Reports Configuration 		1-1 < >	Proposal	Proposal #3 – PI: admin, admin – Sponsor: National Institutes of Heal Due date: 11/30/2019 Last action: 11/25/2019 10:29 AM
			Proposal	Proposal #4 – PI: admin, admin – Sponsor: NIH – Title: Proposal Test_ Due date: Last action: 12/09/2019 10:07 12/20/2019 AM Compliance

4. On the Common Tasks page, click Create Proposal.

KUALI RESEARCH	Common Tasks		
 Dashboard Search Records Common Tasks All Links Reports Configuration 	Quick Links	COI My Disclosures	Institutional Proposal Create Institutional Proposal Create Proposal Log Search Institutional Proposals Search Proposal Logs
 ⑦ Help ② About ① Logout ③ Alam, Jawed ☑ Switch Apps 	Locks Negotiation All My Negotiations Create Negotiation Search Negotiation	Proposal Development All My Proposals Create Proposal Search Proposals	Protocols Manage Protocols

Create Proposal

- 5. On the Create Proposal page, select from the drop down menus for:
 - Proposal Type
 - Select Initial Submission New Project or Initial Submission Legacy Project.



5

- Lead Unit (*i.e.*, Department or Center). The only units you will see in the drop-down list are those depts for which you have been authorized to create proposals. If you need authorization for other departments, please contact the Office of Grants & Contracts (OGC) at grants-NO@lsuhsc.edu.
- Activity Type (select from options)
- Expected **Project start and completion Dates**. Please confirm accuracy as these dates will determine budget periods.
- 6. Type the **Project Title**
- 7. In the Sponsor field, click the magnifying glass icon

	Create Proposal			
Q Search Records	* indicates required fields			
🗹 Common Tasks	Proposal Type: *	select		~
GĐ All Links	Lead Unit: *	select		•
16 Reports	Activity Type: *	select		v
Configuration	Project Dates: *	mm/dd/yyyy	to mm/dd/yyyy	
	Project Title: *			
	Sponsor: *			٩

- 8. On the **Sponsor Lookup** form, enter the ***Sponsor Name*** or ***Acronym*** surrounded by asterisks and then click **Search**.
- **9.** Select the correct sponsor from the retrieved list.

Dashboard	Create Proposal
Q Search Records	* indicates required fields Lookup ×
Common Tasks	Sponsor Lookup
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IL Reports	Sponsor Code:
🔹 Configuration	Sponsor Name:
	Acronym: 'nc''
	Sponsor Type Code: Q
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	select 100591 NIH - NCI (National NCI Cancer Institute) Cancer Institute)
	seed 100552 National Cancer NCIC Foreign Federal
	Institute of Landas Government
⊘ Help 🗹	First Previous 1 Next Last

Create Proposal

- 10. If no Sponsor is retrieved, press **Clear Values**, enter ***New*** for the **Sponsor Name** and click **Search**.
- 11. Select "New Sponsor". Enter details about the New Sponsor In the Supplemental Information panel (page 36). OR EMAIL grants-NO@lsuhsc.edu WITH ALL AVAILABLE SPONSOR INFORMATION FOR OGC TO ENTER THE SPONSOR IN KUALI.
- 12. In the **Principal Investigator** field, click the magnifying glass icon.
- 13. On the **Person Lookup** form, enter **Last Name**, **First Name** or **Email Address** of the PI and then click Search.
- **14.** Select the correct PI from the retrieved list.
- 15. If the PI is not retrieved contact the Office of Grants & Contracts (OGC) at <u>grants-NO@lsuhsc.edu</u>.

Common Tasks	KcPerson Lookup	×
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IL Reports	KcPerson Id:	~
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	First Name:	
	User Name:	
	Email Address: user@domain.com	Cancer Institute) Q
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	Showing 1 to 1 of 1 entries	0

- 16. The **Sponsor & Principal Investigator** fields will be populated with the appropriate **codes** and **names**.
- 17. Click Save and Continue.

 Dashboard Search Records 	Create Proposal		
	Proposal Type: *	Pre-Award	~
🖸 Common Tasks	Lead Unit: *	NO1497400 - Center of excellence-Cancer	
GÐ All Links			
II. Reports	Activity Type: *	Research	~
🔅 Configuration	Project Dates: *	03/30/2021 to 03/30/2022	
	Project Title: *	Inhibition of breast cancer metastasis	
	Sponsor: *	100591 NIH - NCI (National Cancer Institute)	Q
			-
🔿 Help 🛛 🗹	Principal Investigator: *	37203 Augusto Ochoa	٩
About		Augusio Ocnoa	
() Logout			
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III Switch Apps			
< Collapse Menu		Cancel Save and Continue	

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Proposal Details

- 18. You will be directed to the **Proposal Details** page which will contain the proposal information entered on the previous page.
- 19. You can use the **left-hand menu** to navigate to different panels of the overall form. Use the **Help tab** for additional information and instructions for each panel of the form.
- 20. The Proposal will be assigned a number and new fields will appear.
- 21. Select the **Prime Sponsor Code**, if applicable (*e.g.*, when LSUHSC is a subawardee on an application). Use the same procedure as above for selecting the Sponsor.
- 22. If the Proposal Type is *Initial Submission Legacy Project*, two additional fields will appear: Award ID and Original Institutional Proposal ID. No entries are needed in these fields.
- 23. Do not enter any information in the **Keywords** field. Enter the required keywords in the **Supplemental Information** panel (described below).
- 24. Click Save and Continue.

Proposal Development Proposal: #54 PI: Augusto Ochoa							Document Inf Doc Nbr: 468 \$2\$ Connecte Initiator: jalar Status: In Pro more	2 ed: no m
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Compliance	Project Dates: *	10/01/2021	to	09/	30/2024			-
AttachmentsQuestionnaire	Project Title: *	Inhibition of breast cancer metastasis						
D Budget	Sponsor: *	100591				NIH - NCI (Nation	al Cancer Institute)	۹
Access Supplemental Information	Prime Sponsor Code:							۹
Summary/Submit	Keywords:	Nothing selected						•
		Save Save and Continue Close						

Delivery Info

25. In the **Delivery Info** panel:

- Select if the Proposal will be **Submitted By** the Department or ORS; leave blank if not applicable.
- Select the **Submission Type** from the drop down menu; leave blank if not applicable.
- Submission Account ID (*i.e.*, Shipping Account #) & Number of Copies: Complete these fields only if paper copies of the application is required by the sponsor AND OGC is responsible for mailing the document.
- Submission Description: Optional.
- 26. Click Save and Continue

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Sponsor & Program Information

27. In the Sponsor & Program Information panel:

 Select the Sponsor Deadline Type from the drop down menu; leave blank if not applicable;



- Enter the Sponsor Deadline date if applicable;
- Select the Notice of Opportunity type; leave blank if not applicable;
- Enter the Opportunity ID & Title if applicable;
- Check Subawards if applicable;
- Sponsor Proposal ID: Use this field to enter the grant, contract or protocol #.
- NSF Science Code: enter if this is an NSF grant proposal.
- Anticipated Award Type: select the most appropriate item from the dropdown. This is a required field.
- Enter or select information in the remaining fields if applicable.
- Do not complete the CFDA section.
- 28. Use the Help tab for a more detailed description of each field.

29. When finished, click Save and Continue.

Save

Back

Save and Continue

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Sponsor Deadline Type:	Receipt							~
Sponsor deadline:	03/19/2021			hh:n	ım			
Notice of Opportunity:	Federal Solicitation							~
Opportunity ID:	12345							
Opportunity Title:	Targeted therapy for breast ca	ncer metasta	sis					
Subawards:	✓ Yes, this proposal includes	subaward(s)					h
Sponsor Proposal ID:	6789							
NSF Science Code:	Biological and Biomedical Sci	ences - Life S	Sciences: D.02				~	Q
Anticipated Award Type:	Grant Award Agreement							~
Agency Routing Identifier:	2468							
Prev Grants.Gov Tracking ID:	13579							
▼ CFDA								
CFDA Number *		CF	DA Program	Title Name		Actions	;	
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Close

Organization & Location

30. In the **Organization & Location** panel, the <u>Applicant</u> and <u>Performing</u> <u>Organization</u> tabs will default to LSUHSC; DO NOT CHANGE.



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Proposal Details	Organizations & Loc	ations				
Delivery Info	Applicant Organization Perfor	ming Organization	Performance Site Locations	Other Organizations		
Sponsor & Program Information	Applicant Organization					
Organization and Location	Details					
L Key Personnel				7		
V Compliance	Organization Name	Louisiana State	University Health Sciences Center			
	Address Line 1	c/o Office of Re	search Services			
S Attachments	Address Line 2	433 Bolivar Stre	eet, 2nd Floor			
Questionnaire	Address Line 3					
Budget	City	New Orleans				
	State	LA				
Access	Postal Code	70112				

- If there are collaborating institutions or subcontract locations, click the <u>Other</u> <u>Organizations</u> tab to identify these institutions. Do not use the <u>Performance Site</u> <u>Locations</u> tab.
- 32. Click Add Organization.

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Sponsor & Program Information	046								
Organization and Location	Other Organizations								
L Key Personnel	Q. Add Organization								
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- 33. In the **Organization Lookup** window, enter a name of the **Organization with asterisks** (*e.g.*, *ochsner*).
- 34. Click Search.

Proposal: #32 Proposal: #32 Pl: Augusto Ochoa		Lookup		×	Document Info Doc Nbr: 4001 \$25 Connected: Initiator: jalam Status: In Progress
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Organizations & Locations

35. Check **the appropriate institution** from the retrieved list.



36. Click Return Selected.

Proposal: #32 Proposal: #32 Pl: Augusto Ochoa	1	Lo	okup										×			Document Info Doc Nbr: 4001 S2S Connected:
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Delivery Info	Applicant Or	0	000421	Ochsner Westbank				2								
Sponsor & Program Information	Other Or	0	000095	CHRISTUS Ochsner St.				2								
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% Attachments			000415	Ochsner Clinic Foundation				2								
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(D) Budget			000417	Ochsner Health System				2								
Access		Sho	wing 1 to 10 of	12 entries					F	inst Previous	1 2	Next Last				
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(Summary/Submit																
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- 37. The organization will be listed on the **Other Organizations** page.
- 38. If necessary, click Add Organization to enter additional institutions.
- 39. If no Organization is retrieved, press **Clear Values**, enter ***New*** for the **Name** and click **Search**.
- 40. Select "New Organization". Enter details about the New Organization In the Supplemental Information panel (page 36). OR EMAIL grants-NO@lsuhsc.edu WITH ALL AVAILABLE ORGANIZATION INFORMATION FOR OGC TO ENTER THE ORGANIZATION IN KUALI.
- 41. Click Save and Continue when all organizations have been entered on this page.

Applicant Organization Performing Organization				
Applicant Organization Performing Organization	Performance Site Locations	Other Organizations		
Other Organizations				
other organizations				
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Key Personnel

- 42. In the Key Personnel panel, the PI will be listed automatically.
- 43. Click the **side arrow** next to the PIs name, click the **Proposal Person Certification** tab and carry out the **certification**.

NOTE: Individuals with a Proposal Creator role (typically Business Managers, Assistant BMs and some Research Coordinators) have system permission to certify on behalf of the PI. When you certify for the PI, an email notification will be sent to the PI informing him/her that the certification has been completed by proxy. If you are uncomfortable with carrying out the certification or if the PI won't delegate this authority to you, click Notify PI to send an email requesting the PI to certify the proposal.

44. To add other Key Personnel, click Add Personnel. All project personnel that are LSUHSC faculty, staff or students must be listed as Key Personnel even if they don't meet the official definition of Key Personnel.

Proposal Development Proposal: #32 PI: Augusto Ochoa		Document Info Doc Nbr: 4001 S2S Connected: no Initiator: jalam Status: In Progress more
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Basics	×	
1 Key Personnel	> Key Personnel	
Personnel	Search for and add key personnel	
 Compliance 	Add Personnel	Notify All
Attachments		
Questionnaire	No Project Status: Disclosure Not Required Annual Disclosure Status: Expired Project Disposition: None	tify Augusto Ochoa
Budget		
Access		
Supplemental Information		
▲ 0	Back Save Save and Continue Close	
Questionnaire	Augusto Ochoa (PI/Contact) (Certification Completed and Answered By Jalam - 07/16/2021 10:25 AM) Project Status: Disclosure Not Required Annual Disclosure Status: Expired Project Disposition: None	Notify Augusto Ochoa
Budget Access	Details Organization Extended Details Degrees Unit Details Person Training Details Proposal Person Certification	
Supplemental Information	Proposal Person Certification	
Summary/Submit	Clear All Annivers Certification Regarding Lobbying	
Super User Actions	The undersigned certifies, to the best of his or her more and the set of his or her knowledge and belief, that (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer of employee of a literative set of the contract, the making of any Federal grant, the Congress, an officer or employee of Congress, or an employee of a literative sin connection with the awarding of any Federal contract, the making of any Federal grant, the	iny agency, a Member of making of any Federal Ioan,
Notifications History	the entering into any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.	
	Coltary funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any approx, a Me officer or employee of Compress, or an employee of Amether of Compress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall comple form.LLL "Disclosure Form to Report Lobbying," in accordance with its instructions.	mber of Congress, and ete and submit Standard
	In The ordersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contract cooperative agreements) and that all subreopients shall certify and disclose accordingly.	ts under grants, loans and

Key Personnel

45. On the **Add Personnel** form, select **Employee. Do not search for Non-Employees**. Enter the **last** or **first name** of the individual. Click **Continue**.

Proposal Development Proposal: # PI: Augusto Ocho	Add Personnel			×	Document Info Doc Nbr: 4001 S2S Connected: no Initiator: jalam Status: In Progress
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L Key Personnel	User Name				
Personnel	Email Address	user@domain.com			
Compliance	Office Phone				Notify All
Attachments	Home Unit			۹	Notify Augusto Ochoa
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Access					
Supplemental Informa		Cont	inue Cancel		
G					

46. Select the correct individual from the retrieved list and click Continue.

Proposal Development Proposal: # PI: Augusto Ocho		×	Document Info Doc Nbr: 4001 S2S Connected: Ino Initiator: jalam Status: In Progress
	Only the top 200 results were returned. If you cannot find what you are looking for, please refine the searc > Full Name: User ID: Email Address: > Unit Number: Unit Name: > Eileen Mederos emede1 emede1@Isuhsc.edu NO1497400 Center of excellence-Cancel Showing 1 to 1 of 1 entries	≎ Organization: ≎ Cityk	more s & Link ⑦ Help →
Basics	Showing I to For Fellines	First Previous 1 Next Last	×
Key Personnel Personnel	Continue Go back Cancel		

- 47. Select if the individual is another PI, Co-investigator or a Key Personnel.
- 48. If Key Personnel, indicate the person's role on the project.
- 49. Click Add Person.

Proposal: #	Add Personnel ×	Doc Nbr: 4001 S2S Connected: no Initiator: jalam
	Assign a role Assign a role: * O Pl/Multiple	Status: In Progress more s & Link ② Help →
Basics	Cc-Investigator	X
L Key Personnel	Key Person's role will be:	
Personnel	Research nurse manager	
Compliance	Add Person Go back Cancel	Notify All
Attachments	Go Dack Cancel	

Key Personnel

- 50. The person will be added to the list in the **Key Personnel** section.
- 51. Repeat the process to add other Key Personnel.
- 52. Do not click the **Notify** button for Key Personnel other than the PI. Only the PI needs to certify the submission.
- **53. If a person is not found during the search contact OGC at** <u>grants-</u><u>NO@lsuhsc.edu</u>.
- 54. If you need to add a non-employee as a Key Person and there will not be a subaward to his/her institution, contact OGC at grants-NO@lsuhsc.edu.
- 55. Even if you are unable to add all Key Personnel, you may continue with other data entry but you will not be able to finalize the budget or submit the proposal. Click Save and Continue.

NOTE: The Annual COI Disclosure status will be displayed for all Key Personnel. If the status is expired, please have the person complete their Annual COI Disclosure in Kuali. If a Key Person has disclosed a potential COI on his/her COI Disclosure form in Kuali, he/she will receive a system generated email notification to update their disclosure based on their participation in the new project (proposal). The proposal will not receive final approval until all personnel have a Disclosure Status of "Approved."

L Key Personnel >	Key Personnel
Personnel	Search for and add key personnel
✓ Compliance	Add Personnel Notify All
N Attachments	
Questionnaire	Augusto Ochoa (Pl/Contact) (Certification Incomplete) Notify Augusto Ochoa Project Status: Disclosure Not Required Annual Disclosure Status: Expired Project Disposition: None
Budget	
Access	Elleen Mederos (Key Person: Research nurse manager) Project Status: Disclosure Not Required Annual Disclosure Status: Expired Project Disposition: None
Supplemental Information	
C	
	Back Save Save and Continue Close

Compliance

56. In the Compliance panel, click Add Compliance Entry if the project requires IRB, IACUC, IBC and/or Radiation Safety approval.



- 57. Complete the required fields in the Add Compliance Entry window. Although not indicated, the Compliance ID # (if available) and either the Application or Approval Date are required fields. The remaining fields are optional.
- 58. Click Add Entry.

Proposal Development Proposal: #32 Pl: Augusto Ochoa		I	Add Compliance E	ntry		×		Document Info Doc Nbr: 4001 S2S Connected: no Initiator: jalam Status: In Progress
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Basics	< [~	i	Compliance Identifier:	12345				x
L Key Personnel	> (Com	Application Date:		E			
✓ Compliance		+ Add	Approval Date:	03/01/2021		3		
S Attachments		► IRE	Expiration Date:		¢.			8
(?) Questionnaire			Exemption #:	Nothing selected		•		
Budget Access			Comments:			11		
Supplemental Information								
Summary/Submit								
-								
				Add Entry Cancel				Ţ

59. Add additional compliance entries as applicable.

60. When finished, click Save and Continue.

			✓ Data Validation (off)	👁 Сору	n Medusa	I≡ Hierarchy	Budget Versions	S Link	⑦ Help ▼
	<	Document was successfully sa	ved.						х
Basics	~								
L Key Personnel	>	Compliance							
✓ Compliance		+ Add compliance entry							
Notachments		IRB Approved 12345							Ê
Questionnaire									
Budget									
Access									
Supplemental Information									
Summary/Submit									
-		Ва	ck Save Save and Continu	e Close					

Attachments

- 61. In the Attachments panel, click the Internal tab. Do not use the other tabs.
- 62. Click +Add to upload documents individually or click Upload & Add to upload multiple documents at the same time.



- 63. In the **Details** window, select the **type** of document being uploaded.
- 64. Identify the Status of the document: Complete (final) or Incomplete (draft). Enter a **Description** of the attachment. If the attachment is a contract or agreement, also enter the Kuali Negotiation ID/Number (assigned when the agreement was first submitted for review by ORS) in this field.
- 65. Choose the file and Click Save.

ď	Proposal: #3 Pl: Augusto Ochoa	2		Details	×				Doc Nbr: 4001 S2S Connected:
				Type: *					more_
œ				Contract/Agreement Status: *	~	dusa	III Hierarchy	CE Budget Versions	S Link @ Help +
đ.			Attachment	Complete Description:	~				
٠	Basics	~	Document was s	Clinical trial agreement; Negotiation ID #24					× 1
	1 Key Personnel	>			6				
	✓ Compliance		Attachments	File: Choose File Insmed_US INS-1007-301 CTALouisiana Center PI Ali final 010821 EXEC VER.	pdf				
	ℜ Attachments		Proposal (0) Pers						
	Questionnaire		Internet (a)	Save					
	D Budget		Internal (o)		-				

66. When all documents have been attached. Click Save & Continue.

 Compliance 	Attachments
Note Attachments	Proposal (0) Personnel (0) Abstracts (0) Internal (1) Notes (0)
Questionnaire	
Budget	Internal (1) + Add Download All Statuser
Access	
Supplemental Information	Uploaded Posted
Summary/Submit	File Type * Status * Description By Timestamp Actions
Notifications History	1 UMCDataUse_15Aug2019final_v1.0 Contract/Agreement v Complete v UMC data use agreement Alam, 03/22/2021 Details (1).docx V VMC data use agreement Jawed 09.58 AM vieweldit rights
	Back Save Save and Continue Close

Note: Some documents are required attachments, such as abstracts and budget justifications for grant applications. Required attachments for routing of research agreements are listed here.

Questionnaire

67. If an Update Available button is present, first click this button to update to the most recent version of the **Questionnaire**.



Proposal Details	Questionnaire	
Delivery Info	Action & Purpose Type 🗸	Proposal Questions 🗸
Sponsor & Program Information	Astisus & Dumas	
Organization and Location	Please select the Pre-Award Ac	e Type (Incomplete) Update Available Clear Print
L Key Personnel >	□ New	

68. Select one or more **Proposal Purpose** types.

- At least one item must be selected.
- The text box at the bottom of the page must have an entry; enter "not applicable" if appropriate.

L Key Personnel	Questionnaire
✓ Compliance	Proposal Purpose V Proposal Questions V Proposal Type(s) V
N Attachments	Proposal Purpose (Incomplete)
Questionnaire	What is the PURPOSE of this project? Select all that apply. 0
D Budget	Conference
Access	Equipment Acquisition
Supplemental Information	Fellowship
Summary/Submit	Information Disclosure/Exchange
Super User Actions	New Construction
Notifications History	Other
	Public Service

69. Click the **Proposal Questions** tab and answer all the questions.

- If the proposal involves a clinical trial, at least one performance site must be selected, even if it is LSUHSC. The procedure for looking up the site is similar to looking up **Organizations (pp. 10-11)**.
- The text box for listing performance sites not found in the Address Book Lookup must have an entry; enter "not applicable" if appropriate.

L Key Personnel	Questionnaire
✓ Compliance	Proposal Purpose V Proposal Questions V Proposal Type(s) V
 Attachments Questionnate Budget Access Supplemental Information 	Proposal Questions (Incomplete) Clear Print Is the PI is eligible for Continuous Submission? ① ``Yes ``No Image: No ``NiA Publications: Have articles resulting from DHHS funding been entered into NLM database ①
Summary/Submit	© Yes ○ No ○ N/A
Notifications History	Is there a non-standard F&A Policy? Yes No Is the funding coming from a foreign source? Yes No
	Back Save Save and Continue Close

Questionnaire (cont.)

70. Click the **Proposal Type** tab and answer all the questions.

- At least one item must be selected.
- The text box at the bottom of the page must have an entry; enter "not applicable" if appropriate.
- The options on this page will differ depending on Proposal Type selected: New Project vs. Legacy Project.
- 71. When finished with the **Questionnaire** panel, click **Save**.
 - If all required questions or fields have entries, green check marks and the designation "Complete" will be displayed next to all three tabs and their titles.
 - Click Save and Continue.

▲ Key Personnel >	Questionnaire
✓ Compliance	Proposal Purpose V Proposal Questions V Proposal Type(s) V
Attachments	Proposal Type(s) (Complete)
Questionnaire	Please identify the Initial Submission type being routed (select all that apply). ①
D Budget	Pre-Application/NOILOI
Access	Grant Application - Initial
Supplemental Information	Contract Based Research - Clinical Trial
Summary/Submit	Contract Based Research - Other
Super User Actions	Other
Notifications History	If you selected "Offner," please effer description in the text box. If "Offner" is not selected type "NIA".
	Back Save and Continue Ciose

Budget

72. General Information

- For clinical trials, please complete the <u>Revenue & Expenditure budget</u> and upload it in the Attachments panel (page 15) and then complete the Kuali Summary budget (pp. 19-20).
- For grants, if LSUHSC is the prime or sub-awardee, please complete the Kuali Detailed budget (pp. 21-31).
- If another institution is a sub-awardee, please complete the <u>Subaward</u> <u>budget</u> and upload it in the **Attachments** panel (page 15) and then complete the **Kuali Subaward budget** (pp. 29-30).
- If this is a Legacy Project and this submission involves adjustment to the previous budget, please re-create the budget in Kuali and/or upload budget documents as described above.
- If a budget is not applicable to this proposal/routing packet, skip to the Access panel (p. 34).

73. In the **Budget** panel, click +Add Budget.



74. In the Budget Version window,

- Enter a budget name;
- Select either Summary Budget (pp. 20-21) or Detailed Budget (pp 22-32);
- Select whether or not this is a modular budget; then
- Click Create Budget.

Proposal Development Proposal: #46 Pl: Augusto Ochoa	Create a Budget Version	×		Document Info Doc Nbr: 4260 S2S Connected: no Initiator: jalam
	Proposal: 46			Status: In Progress more
	Budget Name: *		chy 💷 Budget Versions	S Link ③ Help +
Basics Basics	Will this be a modular budget?:			¥ Add Budget
Compliance Attachments Cuestionnaire Dudget	○ Yes ● No Create Budget Cancel			

Summary Budget

75. You will be directed to the **Periods & Totals** subpanel in the **Budget** panel. Please consult the **Help tab** for more detailed information and instructions regarding each subpanel of the budget.

nd Daté Months	Total ≽ Sponsor ≎				Recalculate v	vith changes	Reset to perio	d defaults
		D'aut à						
		D'and A						
wonuts	Cost	Direct 0 Cost	≎ F&A Cost	Unrecovered F&A	Cost ≎ Sharing	≎ Cost Limit	Direct ≎ Cost Limit	Actions
12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Ê
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Đ
12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Û
12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Û
Total	Total: 0.00	Total:	Total:	Total: 0.00	Total:	Total:	Total:	
	12.0 12.1 12.0 12.0 12.0 12.0 12.0	12.0 0.00 124 12.0 0.00 125 12.0 0.00	12.0 0.00 0.00 12.0 0.00 0.00 12.4 12.0 0.00 0.00 12.5 12.0 0.00 0.00	12.0 0.00 0.00 12.0 0.00 0.00 0.00 12.0 0.00 0.00 0.00 12.1 0.00 0.00 0.00 12.2 0.00 0.00 0.00 12.0 0.00 0.00 0.00	12.0 0.00 0.00 0.00 0.00 12.0 0.00 0.00 0.00 0.00 12.0 0.00 0.00 0.00 0.00 12.0 0.00 0.00 0.00 0.00 12.0 0.00 0.00 0.00 0.00 12.0 0.00 0.00 0.00 0.00	12.0 0.00 0.00 0.00 0.00 0.00 12.0 0.00 0.00 0.00 0.00 0.00 12.4 12.0 0.00 0.00 0.00 0.00 0.00 12.4 12.0 0.00 0.00 0.00 0.00 0.00 12.5 12.0 0.00 0.00 0.00 0.00 0.00	12.22 12.0 0.00 0.00 0.00 0.00 0.00 0.00 12.4 12.0 0.00 0	12.0 0.00 0.00 0.00 0.00 0.00 0.00 0.00 12.0 0.00 0.

- 76. For each period, enter the **Direct** and **F & A Cost** (= Total Direct and Indirect Costs from the CT Rev & Exp Budget sheet, respectively).
- 77. Press Recalculate with changes to calculate totals.
- 78. If all entries are correct, press Complete Budget.

Periods & Totals		+ Add Budget F			Total							
E Rates		Period Start Date *	Period End Date *	≎ ≎ Months	Sponsor ≎ Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost ≎ Sharing		Direct ≎ Cost Limit	Actions
Personnel Costs	>	01/01/2022	12/31/2022	12.0	125,000.00	100,000.00	25,000.00	0.00	0.00	0.00	0.00	Û
Non-Personnel Costs		01/01/2023	12/31/2023	12.0	110,000.00	88,000.00	22,000.00	0.00	0.00	0.00	0.00	Ê
Subawards		01/01/2024	12/31/2024	12.0	100,000.00	80,000.00	20,000.00	0.00	0.00	0.00	0.00	Ê
Institutional Commitments	>	01/01/2025	12/31/2025	12.0	150,000.00	120,000.00	30,000.00	0.00	0.00	0.00	0.00	Đ
Project Income				 Total:	Total:	Total:	Total:	Total: 0.00	Total:	Total:	Total:	
✔ Modular	C			48.00	485,000.00	388,000.00	97,000.00	0.00	0.00	0.00	0.00	
Budget Notes												

79. In the new window, do not check the checkbox; press OK.

Proposal #46 > Budget #1		Marked For Submission: _{NC}
Budget #1: Budget #	Is this budget complete?	Proposal: _{#46}
	Is this budget ready to be submitted to the sponsor?	more t Versions Autocalculate Periods Help
< <tr> < Peric Return to proposal</tr>	Cancel OK	Recalculate with changes Reset to period defaults

Summary Budget

80. Click Return to Proposal.

					V	Pata Validation	(off) C Budget	Settings @ Si	ummary 🔟 Bi	udget Versions	Help +
	<	24									
« Return to proposal		Periods	& Totals					Re	calculate with cha	nges Reset to	period defaults
F Periods & Totals		Period Start Date *	Period End ≎ Date *	≎ Months	Total Sponsor≎ Cost	≎ Direct Cost	≎ F&A Cost	Unrecovered≎ F&A	≎ Cost Sharing		Direct Cost ≎ Limit
Personnel Costs	>	01/01/2022	12/31/2022	12.0	125,000.00	100,000.00	25,000.00	0.00	0.00	0.00	0.00
Non-Personnel Costs		01/01/2023	12/31/2023	12.0	110,000.00	88,000.00	22,000.00	0.00	0.00	0.00	0.00
_		01/01/2024	12/31/2024	12.0	100,000.00	80,000.00	20,000.00	0.00	0.00	0.00	0.00
Subawards		01/01/2025	12/31/2025	12.0	150,000.00	120,000.00	30,000.00	0.00	0.00	0.00	0.00
A Institutional Commitments	>			Total: 48.00	Total: 485,000.00	Total: 388,000.00	Total: 97,000.00	Total: 0.00	Total: 0.00	Total: 0.00	
Project Income						1					

- 81. You will return to the main Budget panel where the completed budget will be displayed.
- 82. Click on the Action button down arrow and select Include for Submission. The budget will then be highlighted in green.
- 83. Click Save and Continue.

Basics	>	The following budge	ts are linked to	this	proposal														
L Key Personnel	>	Name	Version	0	Direct Cost 0	F8	8A	¢	Total	¢	Start	0	End	¢	Status	0	Comments	٥	Actions
✓ Compliance		Budget #1 (for submission)	1		388,000.00	97	07,000.00		485,000.00		01/01/2022		12/31/2025		Complete			(Action
Attachments																			
Questionnaire																			
Budget																			
Access																			
Supplemental Information																			
Summary/Submit																			

Detailed Budget – Rates



- 84. If **Detailed Budget** is selected at **Step 74**, you will be directed to the **Project Personnel** subpanel. Before starting this section, consider the following options:
 - If the Sponsor will not pay the federally-negotiated Facilities and Administrative (F&A) rate, edit the standard LSUHSC rate as described in **Steps 85-87**.
 - Otherwise stay in the Project Personnel subpanel and follow instructions starting at **Step 91**.
- 85. Click on the **Rates** tab to go to the **Rates** page. This page has three buttons across the top. Click on the **Research F & A** button.
- 86. If the standard LSU rates do not seem to be up to date (*e.g.*, not current fiscal year), click on the **Sync All Rates** or the **Sync to Current Institutional Rates** button to update the rates. (Consult the **Help** reference for more information about all action buttons).
- 87. Edit the appropriate **Applicable Rate** to match the Sponsor allowable rate. Note: These rates cannot be edited if the budget has been finalized/completed. Also, make sure to attach the sponsor's official written policy on F&A costs or approval from the Associate Vice President for Finance and Administration in the Attachments panel.
- 88. The standard LSUHSC inflation rate is set at 3%. If necessary, you may adjust this value for any and all project out-periods. Click on the Inflation button and edit the appropriate **Applicable Rate(s)**.
- 89. Do not change any Fringe Benefits rates.
- 90. Click Save. Then click on Personnel Costs > Project Personnel subpanel.

Periods & Totals	-	· · · · · · · · · · · · · · · · · · ·	Fringe Benefits Inflati	n					7
Personnel Costs	>	Research F	° On Campus	Fiscal		tart Date	Institute Rate	Sync to Current Institutional Rates	Reset to Default Rates
Non-Personnel Costs		MTDC	0 on campus	↓ Placal	odi V S	tart Date		 Applicable Rate 	Ť
🗞 Subawards		MTDC	No	2021	0	7/01/2020	26.00	26.00	
C Institutional Commitments	>	MTDC	Yes	2021	0	7/01/2020	47.00	47.00	
Project Income		TDC							
✓ Modular	C	TDC	No	2021	0	7/01/2020	26.00	26.00	
Budget Notes		TDC	Yes	2021	0	7/01/2020	47.00	47.00	
Budget Summary									

91. In the **Project Personnel** subpanel, Key Personnel entered in the main Proposal module will be populated automatically.



92. If additional personnel (non-Key Personnel) need to be added to the budget, click on the **+Add Personnel** button.

	✓ Data Va	lidation (off) 🌣 Budget Settin	gs 🗏 Hierarchy	Summary	Budget Versions	Autocalcu	Ilate Periods (?) Help -
Return to proposal	Project Personne Personnel added to the propos		configure, and add	additional personn	el to the budget.	+ Add Per	Sync from Proposal
Periods & Totals	Person	Job Code	Ap	pointment Type	≎ Base	Salary 🗘	Actions
Rates	From Proposal Development	nt					
Personnel Costs	Augusto Ochoa (PI)	DEFAULT (AA000)	12	M DURATION	0.00		Details
Project Personnel	Eileen Mederos (KP)	DEFAULT (AA000)	12	M DURATION	0.00		Details

- 93. In the **Add Personnel** window, you have the option to **Search for** and add one of the following personnel type:
 - Employee: follow Steps 94-95 below.
 - Non-Employee: if you want to add a non-LSUHSC employee to the proposal without a subaward to his/her institution, contact OGC at <u>Grants-</u> NO@lsuhsc.edu.
 - To be Named: follow instructions in the window.
- 94. Enter the individual's first or last name and click Search.

Budget #1	Add Personnel		×	Created: 04/29/2021 Proposal: #47
	Search for *	Employee	~	more
	Last Name	rame		late Periods (?) Help -
	First Name			sonnel Sync from Proposal
« Return to proposal	User Name			Actions
Rates	Email Address	user@domain.com		
Personnel Costs	Office Phone			Details 🗎
Project Personnel	Home Unit		۹	Details
Assign Personnel to	Campus Code		Q	
Non-Personnel Costs				
Subawards		Search Cancel		

- 95. From the retrieved list, select the correct individual and click Add Selected Personnel.
 - If you are unable to retrieve an employee, contact OGC at <u>Grants-NO@lsuhsc.edu</u>.

Budget #1	Add Personnel						×	Created: 04/29/2021 Proposal: #47
	Only the top 200 results we	re returned.	If you cannot find what you are	looking for, please refin	e the search criteria	I		
	Full Name:	User ID:	Email Address:	Onit Number:	Onit Name:	Organization:	≎ City: ≎	late Periods ③ Help 👻
	Kadie Rome	krome	krome@lsuhsc.edu					
	Rachelle Rome	rmela4	rmela4@lsuhsc.edu					sonnel Sync from Proposal
« Return to proposal	Showing 1 to 2 of 2 entries					First Previous 1	Next Last	Some Sync nom Proposal
↓ Periods & Totals								Actions
Rates								
Personnel Costs			Add Selected Personne	Refine Search	Cancel			Details

96. When all personnel have been added (and/or removed using the trash can icon), click on the **Details** button for each person.



« Return to proposal	Project Personne Personnel added to the propose	اعد shown below. Review, configure	, and add additional personnel t	o the budget.	+ Add Personne	Sync from Proposal
F Periods & Totals	Person	Job Code	Appointment Type	≎ Base S	alary 🗘 Act	ions
Rates	From Proposal Development	t				
Personnel Costs ∽	Augusto Ochoa (PI)	DEFAULT (AA000)	12M DURATION	0.00	De	tails 🖹
Project Personnel	Eileen Mederos (KP)	DEFAULT (AA000)	12M DURATION	0.00	De	tails 🗎
Assign Personnel to Periods	Other Personnel					
Non-Personnel Costs	Kadie Rome	DEFAULT (AA000)	12M DURATION	0.00	De	tails
Subawards						
Institutional Commitments >						
Project Income						
Project Income	Back	Save Save and Continue	Complete Budget Close			

- 97. In the new window:
 - The Salary Effective Date will default to the Project Start date. Do not change unless the person will start working on the project mid-period (for instance, a post-doctoral fellow will not have been hired until several months after the project/award start date).
 - Set the **Salary Anniversary Date** equivalent to the **Effective Date**. Otherwise inflation will be added for all or part of Year 1.
 - Enter the person's **Base Salary**.
 - Press Save Changes.
- 98. Repeat this process for all personnel.

			IVIa	rked For Submission: No
Edit Personnel		×	Pro	eated: _{04/29/2021} oposal: _{#47}
Augusto Ochoa			тс	re
Details Salary by	Period		t Versions 🛛 😂 Autocalculate	Periods (?) Help +
Details	BI/Contact		+ Add Person	el Sync from Proposal
Role.			ot.	
		۹	Base Salary	tions
Job Title:	DEFAULT	_	0.00	etails 🗎
Appointment Type:	12M DURATION	~		etails
Salary Effective Date:	03/31/2021			
Salary Anniversary			0.00 D	etails
Base Salary:	200,000.00			
	Save Changes Cancel			
	Augusto Ochoa Details Salary by Details Role: Job Code: * Job Title: Appointment Type: Salary Effective Date:	Augusto Ochoa Details Salary by Period Details PUContact Job Code: AA000 Job Title: DEFAULT Appointment Type: 12M DURATION Salary Effective Date: 03/31/2021 Salary Anniversary Date: 200,000.00	Augusto Ochoa Details Salary by Period Details Role: PUContact Job Code: AA000 Q Job Title: DEFAULT Appointment Type: 12M DURATION V Salary Effective 03/31/2021 IS Date: Base Salary: 200,000.00	Edit Personnel × Augusto Ochoa Details Salary by Period Details Role: PVContact Job Code: AA000 Q Job Code: AA000 Q Base Salary Date: Salary Anniversary Date: Salary Anniversary Date:

99. When finished press Save and Continue.

	Project Personn	el			+ Add Per	sonnel Sync from Proposal
Return to proposal	Personnel added to the propos	sal are shown below. Review, configu	re, and add additional personnel to	the budget.		
Periods & Totals	Person	Job Code	Appointment Type	Base Sal	ary 🗘	Actions
Rates	From Proposal Developmen	nt				
👤 Personnel Costs 🛛 🗸 🗸	Augusto Ochoa (PI)	DEFAULT (AA000)	12M DURATION	200,000.0	10	Details
Project Personnel	Eileen Mederos (KP)	DEFAULT (AA000)	12M DURATION	100,000.0	10	Details
	Other Personnel					
Assign Personnel to Periods	Kadie Rome	DEFAULT (AA000)	12M DURATION	50,000.00)	Details 🗐
Non-Personnel Costs						
Subawards						
↓ Institutional Commitments >						
Project Income						

100. In the Assign Personnel to Periods panel, click on the Assign Personnel button.

 ≪ Return to proposal ↓∓ Periods & Totals 	Assign Personnel to Periods Assign personnel to one or all periods and configure efforts and charges. Period 1 Period 2 Period 3 Period 4
 Rates Personnel Costs ~ 	Period 1 Calculate Current Period Assign Personnel
Project Personnel	
Assign Personnel to Periods	

101. In the new window:

- Select the person and complete the rest of the form. *Fields are self-explanatory*. Note: the requested salary value will remain at 0.00 until the person has been assigned to the given period.
- Click Assign to Period 1.

Proposal #47 > Budget #1 Budget #1: Budget #	Add Personnel to	Period	×	Marked For Submission: _{No} Created: _{04/29/2021} Proposal: _{#47}
	Person: *	Augusto Ochoa (AA000)	~	more
	Appointment Type:	12M DURATION		
Assi	Date:	03/31/2021		t Versions
« Return to proposal Assign 1 IF Periods & Totals Period	Object Code: *	Faculty & Staff - PI	۹	
Rates	Group:	Default	~	
Personnel Costs ~	Start Date: *	01/01/2022		Calculate Current Period Assign Personnel
Project Personnel Assign Personnel to Periods	End Date: *	12/31/2022		
Non-Personnel Costs	Effort %:	10.00		
Subawards	Charged %:	10.00		
Institutional Commitments	Requested Salary:	0.00		
Project Income	Period Type:	Calendar	~	
		Assign to Period 1 Cancel		• •

OGC-071_Creating & Submitting Initial Proposals

- 102. Repeat this process to assign all appropriate personnel to **Period 1**.
- 103. Do not enter information for the remaining periods. As a general rule, start budgets by assigning project personnel to **Period 1**, adding the non-personnel expenses, and then generating the 'out-years' using the **Autocalculate Periods** (see below) tool. Once the periods have been populated with the inflated salaries and other expenses, the user can open the individual budget periods to make adjustments, *e.g.* add a person that starts in period 3 of a 5 year project and apply their effort to later periods, add an equipment item in period 2 only, change the calculated inflation amount of the travel expenses, add a subaward, etc.

104. Press Save and Continue.

Periods & Totals	Assign personnel to Period 1 Period 1	Period 1 Period 2 Period 3 Period 4									
Rates	Period 1	Calculate Current Period Assign Personnel									
Personnel Costs 🗸 🗸	Person 🗘	Start	End	≎ Effort ≎	Charged 🗘	Period Type 🗘	Requested Salary 🗘	Calculated Fringe 🗘	Actions		
Project Personnel	Faculty & Staff -	Faculty & Staff - Investigator Details 8									
Assign Personnel to Periods	Eileen Mederos	01/01/2022	12/31/2022	20.00	20.00	Calendar	20,909.00	9,618.14	Details		
Non-Personnel Costs	Faculty & Staff -	PI							Details & Rates		
Subawards	Augusto Ochoa	01/01/2022	12/31/2022	10.00	10.00	Calendar	20,909.00	9,618.14	Details 🗎		
Institutional Commitments >	Postdoc Fellow								Details & Rates		
Project Income	Kadie Rome	01/01/2022	12/31/2022	100.00	100.00	Calendar	52,272.50	9,356.78	Details 🗎		
Modular 🖻											



106. Select the non-personnel item and provide the requested information.

107. Press Add Non-Personnel Item to 1.

Budget #1: Budg	jet #1	Add Assigned Nor	n-Personnel						Created: 04/29/2021 Proposal: #47
		Category Type:	Other Direct		~				nue.
		Category:	Supplies	~	Q,	day	@ Summary	CED Budget Versions	Autocalculate Periods (9) Help +
	Non-Personnel Costs	Object Code Name: *	Supplies	×	Q,	ı			
Return to proposal F Periods & Totais	Add and configure non-personnel items fc Period 1 Period 2 Period 3	Total Base Cost:	20,000.00			I			
E Rates	Period 1	Quantity:	1						
🚨 Personnel Costs 🗸 🗸	Pendal	Description:	Reagents						Assign Non-Personnet
Project Personnel									
Assign Personnel to Periods									
Non-Personnel Costs			Add Non-Personnel Item to 1 Cancel						

108. Add additional items to Period 1 as necessary.

109. When finished, click Save and Continue.

« Return to proposal ↓∓ Periods & Totals	Non-Personnel Costs Add and configure non-personnel items for this budget period Period 1 Period 2 Period 3 Period 4	d.			
Rates	Period 1				Assign Non-Personnel
💄 Personnel Costs 🛛 🗸	Description	 Description 	 Quantity 	Total Base Cost 0	Actions
Project Personnel	Equipment				
Assign Personnel to Periods	Equipment	imager	1	4,500.00	Details 🔒
Non-Personnel Costs	Other Direct				
🗞 Subawards	Supplies	Reagents	1	20,000.00	Details 🗎
🗘 Institutional Commitments 🗸	Participant Support				100 Participants (edit)
Cost Sharing	Participant Support Costs		100	50.00	Details 🔒
Unrecovered F & A	Travel				
Project Income	Travel		2	2,500.00	Details 🗎
✓ Modular					
Budget Notes					
Budget Summary					
		ack Save Save and Continue	Complete Budget Close		

110. If Period 1 budget is complete, press Yes to apply this budget to future periods. Note: Once you Autocalculate all periods you will not be able to take this action again unless you delete the line items from all periods after Period 1.

Kuali Research										Π
Proposal #47 > Budget #1 Budget #1: Budget #1		Please Select ×	Created: 04/29/20						29/2021	*
		Are you ready to apply your Period 1 budget to future periods?						Proposal: #4 more		
		No Yes	dget Settings	III Hierarchy	Summary	(II) Budget Versions	Autocalcul	ate Periods	@ Help -	
« Return to proposal	Add and configure non-personnel items for this budget period									

OGC-071_Creating & Submitting Initial Proposals

Detailed Budget – Future Period Adjust

111. Once the Period 1 budget has been applied to all periods, you will be taken directly to the **Subawards** panel (see below). If, however, you need to adjust any budget items, simply click on the **Personnel Costs** or **Non-Personnel Costs** tab and adjust budgeted values in the appropriate budget period(s).



- **112.** Adjustment Example 1: Deleting equipment from future periods.
 - On the Non-Personnel Costs page, click on Period 2.
 - Click the Trash Can icon for Equipment.
 - Repeat for Periods 3 & 4.

٢	Non-Personnel Costs					
« Return to proposal	Add and configure non-personnel items for this budget period.					
↓F Periods & Totals	Period 1 Period 2 Period 3 Period 4					
Rates	Period 2					Assign Non-Personnel
Personnel Costs V	Description	Description	Quantity 0	Total Base Cost	Actions	
Project Personnel	Equipment					
Assign Personnel to Periods	Equipment	imager	1	45,000.00	Details 🔒	
Non-Personnel Costs	Other Direct					
🗞 Subawards	Supplies	Reagents	1	20,600.00	Details 🗎	
🗘 Institutional Commitments 🗸	Participant Support					100 Participants (edit)
Cost Sharing	Participant Support Costs		100	51.50	Details	

- 113. In future periods, you will notice that **values for many of the items** have been adjusted by an inflation factor compared to Period 1 values.
- **114.** Adjustment Example 2: Deleting inflation factor from future periods.
 - Click the **Details** button for **Participant Support Cost**.

 ≪ Return to proposal ↓ Periods & Totals 	Non-Personnel Costs Add and configure non-personnel items for this budget period. Period 1 Period 2 Period 3 Period 4				
Rates	Period 2				Assign Non-Personnel
🚨 Personnel Costs 🗸 🗸	Description 0	Description 0	Quantity	C Total Base Cost ≎	Actions
Project Personnel	Other Direct				
Assign Personnel to Periods	Supplies	Reagents	1	20,600.00	Details 🗎
Non-Personnel Costs	Participant Support				100 Participants (edit)
🗞 Subawards	Participant Support Costs		100	51.50	Details
🗘 Institutional Commitments 🗸	Travel				
Cost Sharing	Travel		2	2,575.00	Details

- Adjust the Total Base Cost to that in Period 1. Uncheck the Apply Inflation checkbox.
- Press Save and Apply to Other Periods.

< Return to proposal	Add and configure non-personnel items f	Catego	ory: Trainee/Pa	inticipant Costs - Other	~ 0	L	
↓F Periods & Totals	Period 1 Period 2 Period 3	Object Code Na	me: Participant S	support Costs			
Ratos	Period 2		ost: 50.00				Assign Non-Personnel
Personnel Costs	Description	Quan				Base Cost	Actions
Project Personnel	Other Direct						
Assign Personnel to Periods	Supplies	Descript	ion:			0.00	Details 8
Non-Personnel Costs	Participant Support					-A	100 Participants (edit)
Subawards	Participant Support Costs	Inflation R	lates				Details
A Institutional Commitments	Travel	Description	Start Date	Institution Rate	Applicable Rate		
Cost Sharing	Travel	Other	07/01/2022	3.00	3.00	3.00	Details
Unrecovered F & A		Other	07/01/2023	3.00	3.00		
D Project Income		Apply Inflat	ion:				
🛩 Modular	2	Submit cost shar	ing: 🗹				
III Budget Notes		On Camp	ous: 🗹				
Budget Summary		Save Chang	Caup And A	oply To Other Periods Sys	nc To Period Direct Cost Limit		
		Save Chang		Period Cost Limit Cance			
			Sync to	Canci			

OGC-071_Creating & Submitting Initial Proposals

Detailed Budget – Future Period Adjust

- 115. The **adjusted values** will now be displayed in the **Non-Personnel Costs** panel.
- 116. Similar adjustments to personnel costs also may be made in the Assign Personnel to Periods panel.
- 117. Click Save and Continue to advance to the next panel.

Proposal #47 > Budget #1 Budget #1: Budg	get #1				Marked For Submission: _N Created: _{04/29/2021} Proposal: ₈₄₇ more
			🛩 Data Vali	dation (off) O Budget Settings III Hier	rarchy @ Summary ID Budget Versions () Help +
 Return to proposal ↓ ₹ Periods & Totals 	Non-Personnel Costs Add and configure non-personnel items for this bu Period 1 Period 2 Period 3 Period				
Rates	Period 2				Assign Non-Personnel
💄 Personnel Costs 🛛 🗸	Description	0 Description	© Quantity	C Total Base Cost	© Actions
Project Personnel	Other Direct				
Assign Personnel to Periods	Supplies	Reagents	1	20,600.00	Details
Non-Personnel Costs	Participant Support				100 Participants (edit)
🗞 Subawards	Participant Support Costs		100	50.00	Details 8
	Travel				
Cost Sharing	Travel		2	2,575.00	Details
Unrecovered F & A					
Project Income					
✓ Modular 🛛 🔁					
Eudget Notes					
Budget Summary					
		Back Save Save and Continue	Complete Budget Clo	-	

Detailed Budget - Subaward

118. If applicable, complete the **Subawards** panel; otherwise navigate to the next panel.



119. In the Subawards panel, click +Add Subaward.



- 120. In the new window, search for the organization as described in the Organizations & Locations Panel (pp. 10-11).
- 121. If no Organization is retrieved, press **Clear Values**, enter ***New*** for the **Name** and click **Search**.
- 122. Select "New Organization". Enter details about the New Organization In the Supplemental Information panel (page 36). OR EMAIL grants-NO@lsuhsc.edu WITH ALL AVAILABLE ORGANIZATION INFORMATION FOR OGC TO ENTER THE ORGANIZATION IN KUALI.
- 123. Do not upload the completed Subaward budget file here. Upload it in the Attachments panel (p. 15).
- 124. Leave a comment if desired and press Add Subaward.

Proposal #32 > Budget #1 Budget #1: Budget #1	Add Subaward		×			Marked For Submission: _{No} Created: 04/28/2021 Proposal: #32
	Organization Id:	1	Q			more
	File Name:	Choose File No file chosen		chy @ Summary	ED Budget Versions	Autocalculate Periods ⑦ Help ~
Subawa	rds Comments:					
	rmatted budget document		Æ			+ Add Subaward
Rates		Cancel Add Subaward				
Personnel Costs			-			

125. Add additional subawardees if applicable. For each subawardee, click the **Details** button.

« Return to proposal	Subawards Upload a pre-formatted budget document for a subawardee organization or enter details manually.			
↓F Periods & Totals				+ Add Subaward
Rates	Organization Id	File Name	Actions	
Personnel Costs	Tulane University Medical Center (000567)		8 Details	

Detailed Budget - Subaward



- 126. For each period, enter the **Direct** and **F & A Costs** (= Total Direct and Indirect Costs from the <u>Subawardee Budget sheet</u>, lines 44 & 45, respectively).
- 127. Enter Cost Sharing values if applicable. Press Save Changes.

Proposal #47 > Budget #1											_	Marked For Submission: 1
Budget #1: E	Budg	let #1	Subaward Detai	ls							×	Created: 04/29/2021 Proposal: #87
												more
									Name: hoose File No fi	le chosen	Add	
												Budget Versions Statutocalculate Periods Help -
		Subawa										
« Return to proposal		Upload a pre-l	Organization Name	Tulane University I	Medical Ce	inter	F	orm Name:				
↓F Periods & Totals		_	Subaward PDF File				Pdf Las	st Updated:				+ Add Subawar
EB Rates		Organization	Name:					- 1	1			© Actions
Personnel Costs	>	Tulane Unive	Xml Last Updated	k			Subaward Code:	Status				B Detais
Non-Personnel Costs			Namespace	e			c	Comments:				
Subawards												
💭 Institutional Commitment	5		Details									
200 Project Income			Budget Period	Direct Cost	õ	F&A Cost	¢	Cost Sharing	0	Total Cost	õ	
🖌 Modular	C		1	10,000.00		5,000.00		0.00		15,000.00		
II Budget Notes			2	11,000.00		5,500.00		0.00		16,500.00		
Budget Summary			3	15,000.00		7,500.00	-	0.00		22,500.00		
			4	8.000.00		4000.00	-	0.00		12.000.00		
				Let	_							
							_					
		_				Save Char	nges No					
			_			and the second second		Contraction of	I and	_	_	

- 128. When all Subawardees have been updated, press Save and Continue.
- 129. Do not forget to attach the Subaward budget sheet(s) in the Attachment panel.

« Return to proposal	Subawards Upload a pre-formatted budget document for a subawardee organization or enter details manually.			
Periods & Totals	Organization Id	File Name	Actions	+ Add Subaward
Rates	Tulane University Medical Center (000567)	The Halle		
Personnel Costs			Details	
Non-Personnel Costs				
🗞 Subawards				
Institutional Commitments				
D Project Income				
✔ Modular	*			
Budget Notes				
Budget Summary				
	Back Save Save and Continue Complete Budget Close			

Detailed Budget - Budget Summary

- 130. No actions are needed in the Institutional Commitments or Modular panels.
- 131. If applicable, complete the **Project Income** panel.
- **132.** Budget Notes: Anybody working on the proposal budget may add notes in this panel. Use this panel to enter line item budget justifications or upload a budget justification document in the Attachments panel. Budget justifications are required.
- 133. A summary of the budget is provided in the **Budget Summary** panel.
- 134. If the budget requires some adjustments, return to the appropriate panels and edit the budget. Once the budget is finalized, click **Complete Budget**.

Budget #1: Budget	get #1				Create	d For Submission: _N td: 04/29/2021 sal: #47
			🛩 Data Vali	dation (off) 🌣 Budget Settings 🛛 🗮 Hi	ierarchy @ Summary 💷 Budget Vers	ions 💿 Help -
	Budget Summary					
« Return to proposal		P1	P2	P3	P4	
Periods & Totals		(01/01/2022 - 12/31/2022)	(01/01/2023 - 12/31/2023)	(01/01/2024 - 12/31/2024)	(01/01/2025 - 12/31/2025)	Totals
Rates	Personnel					
Personnel Costs	> Salary	\$94,090.50	\$96,913.22	\$98,345.43	\$98,345.43	\$387,694.58
	> Fringe	\$28,593.06	\$29,450.84	\$29,886.09	\$29,886.09	\$117,816.08
Non-Personnel Costs	Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
🗞 Subawards	Personnel Subtotal	\$122,683.56	\$126,364.06	\$128,231.52	\$128,231.52	\$505,510.66
↓ Institutional Commitments >	Non-personnel					
Project Income	> Equipment	\$45,000.00	\$0.00	\$4,500.00	\$4,500.00	\$54,000.00
	> Travel	\$2,500.00	\$2,575.00	\$2,652.25	\$2,652.25	\$10,379.50
✓ Modular	> Participant Support	\$50.00	\$50.00	\$50.00	\$50.00	\$200.00
🗮 Budget Notes	> Other Direct	\$35,000.00	\$37,100.00	\$43,718.00	\$33,218.00	\$149,036.00
Budget Summary	Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Non-personnel Subtotal	\$82,550.00	\$39,725.00	\$50,920.25	\$40,420.25	\$213,615.50
	Totals					
	Total Direct Cost	\$205,233.56	\$166,089.06	\$179,151.77	\$168,651.77	\$719,126.16
	Total F&A Costs	\$75,286.28	\$74,983.37	\$71,487.84	\$71,487.84	\$293,245.33
	Totals Subtotal	\$280,519.84	\$241,072.43	\$250,639.61	\$240,139.61	\$1,012,371.49

135. In the new window, do not check the checkbox. Click OK.

Budget #1: Budget #1	Is this budget complete? $\hfill \times$				Created: 04 Proposal: g	
	Is this budget ready to be submitted to the sponsor?	Budget Settings	I Hierarchy	@ Summary	CIC Budget Versions	@ Help -
Budget Summary	Cancel					

136. Click Return to Proposal.

« Return to proposal							
Periods & Totals			P1 (01/01/2022 - 12/31/2022)	P2 (01/01/2023 - 12/31/2023)	P3 (01/01/2024 - 12/31/2024)	P4 (01/01/2025 - 12/31/2025)	Totals
Rates		Personnel					
Personnel Costs		> Salary	\$94,090.50	\$96,913.22	\$98,345.43	\$98,345.43	\$387,694.58
	>	> Fringe	\$28,593.06	\$29,450.84	\$29,886.09	\$29,886.09	\$117,816.08
Non-Personnel Costs		Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
🗞 Subawards		Personnel Subtotal	\$122,683.56	\$126,364.06	\$128,231.52	\$128,231.52	\$505,510.66
A Institutional Commitments	>	Non-personnel					
Project Income		> Equipment	\$45,000.00	\$0.00	\$4,500.00	\$4,500.00	\$54,000.00
		> Travel	\$2,500.00	\$2,575.00	\$2,652.25	\$2,652.25	\$10,379.50
✓ Modular	C	> Participant Support	\$50.00	\$50.00	\$50.00	\$50.00	\$200.00
Budget Notes		> Other Direct	\$35,000.00	\$37,100.00	\$43,718.00	\$33,218.00	\$149,036.00
Budget Summary		Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Non-personnel Subtotal	\$82,550.00	\$39,725.00	\$50,920.25	\$40,420.25	\$213,615.50

Budget

- 137. You will be returned to the **Budget Panel** of the main module.
- 138. If you have created multiple budgets for the proposal, select the budget that you want to submit.



• Select Include for Submission.

										√ Di	ata	Validation (off) 🖶 Prin	int	@ Copy 📰 Med	dusa 🛛 🗏 Hierarchy		Budget Versions	8 Lin	k 🗇 Help 👻
		•	Budgets																+ Add Budget
Basics	5	>	The following budgets	s are linked to	this	proposal.													
👤 Key P	Personnel		Name	Version	٥	Direct Cost 0	0	F&A 0	0	Total	¢	Start 0	E	End 0	Status	¢	Comments	Acti	ions
		·	Budget #1	1		719,126.16		293,245.33		1,012,371.49		01/01/2022	1	12/31/2025	Complete			Act	ion .
🗸 Compli	liance		Budget #2	2		0.00		0.00		0.00		01/01/2022	+	12/31/2025	Incomplete			10.0	View Summary
Attach	iments		budget #2	2		0.00		0.00		0.00		0110112022		12/31/2023	incompiete				2Copy
Questi	ionnaire	_																1	BPrint Mark Budget Incomplete
Budge	et																	l r	
Access	5																	5	 Include for Submission

139. The budget that will be submitted will be highlighted in green.

140. Click Save and Continue.

Basics	>	Budgets The following budgets a	re linked to this p	proposal.										+ Add Budget
		Name		0 Direct Cost	0	F&A	0	Total 0	Start	0	End 0	Status 0	Comments 0	Actions
Key Personnel	>	Budget #1	1	719,126.16		293,245.33		1,012,371.49	01/01/2022		12/31/2025	Complete		Action
 Compliance 		(for submission)												
Attachments		Budget #2	2	0.00		0.00		0.00	01/01/2022		12/31/2025	Incomplete		Action+
Questionnaire														
D Budget														
Access														
Supplemental Information														
Summary/Submit														
La Super User Actions														
Notifications History														

141. The **Access** panel is used to give document specific permission to other individuals. You may add other people who may require view or edit rights during the proposal preparation process.

Access

- 142. The initiator of a proposal is automatically granted the aggregator role in the Access tab. Do not delete this user.
- 143. If you wish to give permission to another individual, click Add User.

Proposal Development Proposal: #32 PI: Augusto Ochoa								Doc S2S Initia	ment Info Nbr: 4001 Connected: no tor: jalam is: In Progress
			🛩 Data Validation (off) 🖶 Print	👁 Сору	Medusa 📰	⊨ Hierarchy	Budget Versions	S Link	Help +
	<	(i) Document was successfully	saved.						x
Basics	~								
L Key Personnel	>	Permissions							
✓ Compliance		L Add User							
Attachments									
Questionnaire		User Name	Roles				Actions		
Budget		jalam	Aggregator Document Level				Edit Delete		
Access									

144. Enter the First or Last Name of the person and click Continue.

Proposal: # PI: Augusto Ocho	Add Permission		×	Doc Nbr: 4001 S2S Connected: no Initiator: jalam
5	Last Name	rome		Status: In Progress more
_	First Name			s & Link ⑦ Help →
	User Name			X
Basics	Email Address	user@domain.com		
Key Personnel	Office Phone			
Compliance Attachments	Home Unit		۹	
Questionnaire	Campus Code		۹	
Budget				
		Continue Cancel	_	

145. Select the person from the retrieved list and click Continue.

Proposal: # Pl: Augusto Ocho	Add Permissio	'n					×	Doc Nbr: 4001 S2S Connected: no Initiator: jalam
	Only the top 200 res	ults were returned. If	you cannot find what you ar	e looking for, please refine	e the search criteria			Status: In Progress
	Full Name:	User ID:	Email Address:	Onit Number:	Unit Name:	Organization:	≎ City:≎	
	Kadie Rome	krome	krome@lsuhsc.edu					s 🔗 Link 💿 Help 👻
	O Rachelle Ron	ne rmela4	rmela4@lsuhsc.edu					x
Basics	Showing 1 to 2 of 2 e	entries				First Previous	1 Next Last	
L Key Personnel								
Compliance			Continue	Go back Cance	I			

Access (cont.)



146. Assign one or more roles and click Add Permission. *Descriptions of individual* roles may be found by clicking the down arrow in the Help Tab and selecting Access from the drop down menu.

Proposal Development		Document Info
Proposal: #	Add Permission ×	Doc Nbr: 4001 S2S Connected: no Initiator: jalam
Ŭ	Assign a role	status: In Progress more s & Link ⑦ Help +
	Z Aggregator Only Document Level	S & LINK & Help +
	Budget Creator Only Document Level	
	approver Document Level	~
Basics	Viewer Document Level	
L Key Personnel	Budget Creator Document Level	
	Narrative Writer Document Level	
 Compliance 	Aggregator Document Level	
Attachments	Access_Proposal_Person_Institutional_Salaries Document Level	
	Delete Proposal Document Level	
Questionnaire	View Institutionally Maintained Salaries Document Level	
D Budget		
	Add Pormission Go back Cancel	
Supplemental Informa		

147. Provide permission to other individuals as needed.

148. When finished, click Save and Continue.

		🛩 Data Validation (off) 👼 Print 👁 Copy 🗮 Medusa 🗦 Hierarchy 🔯 Budget Ver	sions 🔗 Link 💿 Help 👻
	Permission	าร	
Basics	> Add User		
L Key Personnel	>		
✓ Compliance	User Name	Roles	Actions
N Attachments	jalam	Aggregator Document Level	Edit Delete
Questionnaire	krome	Aggregator Only Document Level, Budget Creator Only Document Level	Edit Delete
Budget			
Access			
Supplemental Information			
Summary/Submit			

Supplemental Information

149. On the Supplemental Info page, click on individual tabs to provide additional information.



- Submission Info Do not enter any values on this tab. For OGC use only.
- **Keywords** are required. To retrieve the Keyword code, search with a descriptive word or partial word surrounded by asterisks and select the most appropriate term from the retrieved list.
- If the Proposal Type is *Initial Submission Legacy Project*, enter the Legacy Project number assigned by ORS. The Project # can be found at the top right hand corner of the first page of the legacy routing packet (*e.g.*, Project# 00000). *This is a required field for Legacy Projects*.
- Enter the name of the **New Organization** if none was retrieved during the search for collaborating **Organizations** (pp. 10-11).
- Complete each applicable field in the General tab.
- If applicable, enter **Prime Applicant Deadline** date and time.
- Enter information about the **New Sponsor** if none was identified during the search for the research **Sponsor** (pp. 5-6).

150. When finished, click Save and Continue.

	✓ Data Validation (off) 🕾 Print @ Copy 📰 Medusa 🗮 Hierarchy 💷 Budget Versions 🔗 Link 💿 Help ∽
<	Supplemental Info
Basics V	Document was successfully saved. X
Key Personnel >	
Questionnaire	Submission Info Keywords Legacy Project New Organization General Prime Deadline New Sponsor
✓ Compliance	Submission Info
S Attachments	Grant ID:
Budget	
Access	Date Grant Submitted:
Supplemental Information	mmiddlyyyy
Summary/Submit	
La Super User Actions	
	Back Save Save and Continue Close

Summary/Submit

151. Click on each of the **horizontal tabs** to view a summary of each panel of the proposal.



- 152. The proposal preparer has a number of action options across the bottom of the page. A description of each action is available by clicking the down arrow on the Help tab and selecting *Summary/Submit* from the drop down menu.
- 153. When the proposal is ready for routing, click Submit for Review.

tachments	Saved		Routing		Approved	
uestionnaire	Proposal Summary Personnel	Compliance Attachments	Questionnaire	Supplemental Info	Keywords	
cess	Proposal Summary					
pplemental Information	Title	Inhibition of I	ereast cancer metastasi	s		
	Principal Investigator	Augusto Och	oa			
mmary/Submit	Lead Unit	NO1497400	Center of excellence-0	Cancer		
tifications History	Proposal Type	Pre-Award				
	Activity Type	Research				
	Proposal Number	32				
	Project Start Date	03/31/2021				
	Project End Date	03/30/2022				
	Include Subaward(s)?	Yes				
	Sponsor Name	NIH - NCI (N	ational Cancer Institute)			
	Prime Sponsor Name					
	Sponsor Deadline Date	03/19/2021				
	Sponsor Deadline Type	Receipt				
	Submit for Review Ad Hoc Recipier	View Route Log Cance	proposal Delete I	Proposal More Acti	ions - Close	

- 154. If the form is incomplete, Errors and Warnings will be listed.
- 155. Fix the Errors and again submit for review.

@ Questionnaire						
D Budget	Data Validation					Turn Off
Access						
Supplemental Information						
🕒 Summary/Submit	Show 10 v entries			learch:		
Super User Actions	Area 0	Section 0	Description		© Severity	Actions
	Error					
	Budget		You must mark a budget for submission.		Error	Fix It
	Key Personnel		The Investigators are not all certified. Please certify Augusto (Ochoa.	Error	Fix It
	Questionnaire	Proposal Purpose	You must complete the questionnaire "Proposal Purpose"		Error	Fix It
	Supplemental Information	Keywords	Keyword 1 is a required field.		Error	Fix It
	Supplemental Information	Keywords	Keyword 2 is a required field.		Error	Fix It
	Supplemental Information	Keywords	Keyword 3 is a required field.		Error	Fix It
	Supplemental Information	Contact	Contact Phone is a required field.		Error	Fix It
	Supplemental Information	Contact	Contact Email is a required field.		Error	Fix It
	Supplemental Information	Contact	Administrative Contact is a required field.		Error	Fix It
	Warnings					
	Sponsor & Program Info		Sponsor deadline date is in the past, relative to the current da	te.	Warnings	Fix It

156. The proposal will route for reviews and approvals. You can view the routing path and the current location of the proposal by clicking on View Route Log (see Step 157). A diagram of the path is shown on the next page, after which additional instructions are provided.

Review & Approval Path



Review & Approval Path

157. Sometimes the Proposal Creator and a Proposal Approver may be the same person (*e.g.*, a dept business manager (BM)).

Kuali Research			
✓ Compliance			
Note Attachments	Actions Taken		×
Questionnaire			
Budget	Action Taken By	For Delegator Time/Date	Annotation
Access	SAVED admin, admin	09:24 AM 03/11/2021	
Supplemental Informa	show COMPLETED Ellis, Jonna B	08:43 AM 07/22/2021	Completed
			<u> </u>
🕩 Summary/Submit	Pending Action Requests		
Notifications History	Action Requested Of	Time/Date Annotation	Pending
	show IN ACTION LIS APPROVE Foster, Timothy	08:43 AM 07/22/2021 Role: KC-PD PI from P Department Level Ap	
	PENDING APPROVE Ellis, Jonna BM	Role: KC-PD Business 08:43 AM 07/22/2021 from PeopleFlow Nan Approval	s Manager - Approver ne: Department Level
	PENDING APPROVE Ramsay, Alistair Cha	Role: KC-PD Departm °08:43 AM 07/22/2021 from PeopleFlow Nan Approval	
	Send Adhoc Ad Hoc Recipients Vie	w Route Log Recall More Actions Close	

158. In this situation, when you submit the proposal for review, you will have the option to bypass your own future approval.

Access	Proposal Summar	Please Select	×
Supplemental Information	Title Principal Investigator	Do you want to receive future approval requests?	
Notifications History	Lead Unit Proposal Type Activity Type	No Yes	biology & Im
	Proposal Number	34	
	Project Start Date Project End Date	03/31/2021 03/31/2022	
	Include Subaward(s)?	Yes	

159. When the person next on the approval path (*e.g.*, PI) logs on to Kuali, the proposal will appear on the approver's dashboard.

Dashboard			Show/hide cards
Proposals routing to me	▼ Filter Sort by ∨	Proposals not routing	▼ Filter Sort by ∽
You're up! Proposal #34 – PI: Foster, Timothy – Spons Due date: 7/31/2021 Last action: 7/22/20		All Cle	ear!

Review & Approval Path



156. Once the approver clicks on the proposal on the dashboard, he/she will be taken to the Summary/Submit panel to take action. **Note:** the approver also can navigate to this page directly from the email notification.

Budget Access Supplemental Information Summary/Submit Notifications History			
Compliance Attachments Cuestionnaire Cuestionnaire Access Supplemental Information Summary/Submit Notifications History		Routing	Approved
Attachments Cuestionnaire Cuestionnaire Cuestionnaire Cuestionnaire Cuestion Cuesti	Saved	Routing	Approved
Cuestionnaire Cuestionnaire Cuestionnaire Cuestionnaire Cuestionaire			
	Proposal Summary Personnel Compliance Attachments	Questionnaire Supplemental Info Keywords	
Access Supplemental Information Supplemental Information Supplemental Information Supplemental Information Notifications History	Proposal Summary		
Access Supplemental Information Summary/Submit Notifications History	Title	AIDS research	
Supplemental Information Summary/Submit Notifications History	Principal Investigator	Timothy Foster	
Summary/Submit Summary/Submit Notifications History	Lead Unit	NO1102500 - Microbiology & Im	
Notifications History	Proposal Type	Initial Submission	
	Activity Type	Research	
	Proposal Number	34	
	Project Start Date	03/31/2021	
	Project End Date	03/31/2022	
	Include Subaward(s)?	Yes	
	Sponsor Name	AIDS Malignancy Consortium (NIH-NCI)	
	Prime Sponsor Name		
	Sponsor Deadline Date	07/31/2021	
	Sponsor Deadline Type CERTIFICATION RECARDING LOBBYING: The undersigned cartiles, to the behalf of the undersigned, to any person for influencing or attempting to influe Member of Congress in connection with the awarding of any Federal contract attension, continuation, nenewal, amendment, or modification of any Federal contract by person for influencing or attempting to influence an officer. Congress in connection with this Federal contract, grant, loan, or cooperative scordance with its instructions: (3). The undersigned shall require that the la subgrants, and contracts under grants, loans and cooperative agreements) a which reliance was placed when this transaction was made or entered into. S11, U.S. Code. Any person who fails to fite the required certification shall be so RECARDING SIGNIFICANT FINANCIAL INTERERST DISCLOSURE: As desc Investigation that would reasonably appear to be directly and significantly after financial interests requiring disclosure ins a key factor in protecting one's reput financial interests requiring disclosure must complete a CM35 Significant Finan- disclosure, and place the materials in a sealed envelope addressed to the Of the name of the person making the disclosure, the name of the sponsor. Ad 105 CREPRINE Sponsor Return Verson	nce an officer of employee of any agency, a Member of Congress, an officer to making of any Federal grant, the making of any Federal loan, the enteri contract, grant, loan, or cooperative agreement (2,1) if any funds other than F employee of any agency. A Member of Congress, and officer or employee agreement, the undersigned shall complete and submit Standard Form-LLU guage of this certification be included in the award documents for all subar of that all subvecipients shall certify and disclose accordingly. This certification binssion of this certification is a preequisite for making or entering into hisgo: to a cult penalty of not less than \$10,000 and not more than \$100,000 bed in Chancellor's Memorandum #35, each investigator is required to disc to by the research or educational activities funded, or proposed for funding nose to disclose any other financial or related interest that could present an ion and career from potentially embarrassing or Ammul allegations of mis- nical Interest Disclosure Form, attach all required supporting documentation ce of Research Services and clearly marked "CONFIDENTIAL Significant F i	or employee of Congress, or an employee of ng into any cooperative agreement, and the detenal appropriated funds have been paid or of Congress, or an employee of a Member of Disclosure Form to Report Lobbyng, 'in nards at all tiers (including subcontracts, in a material representation of fact upon transaction imposed by Sections 1352, Tile for each such fature. CRETIFICATION lose any significant financial interest of the Regardless of the above minimum actual conflict of interest or the perceived to onduct. Each person who has significant n. nucluding a coyof any relevant PM-11