

KUALI QUICKGUIDE APPROVING PROPOSALS

This document describes procedures for accessing, reviewing and approving Proposals in the Kuali Research (KR) electronic platform. KR Proposals are equivalent to research routing packets.

If you are an approver on the routing path (see the last page of this document), you will receive an email notification when it is your turn to take an action. The email will identify the proposal initiator, the PI and the title of the proposal.

1. Click on the **first link** in the email.

	Action List Reminder - Message (Plain Text)		⊞ – ⊡ ×
File Message Adobe PDF ♀ Tell me what you want to do			
Sunk - Delete Reply Reply Forward Reply & Delete Forward Forward Forward Reply & Delete Forward Forward Forward Reply & Delete Forward Forwar	heNote titons - Unread - Arabic - Related Unread - Arabic - Related Select - Select	Zoom Send to Report OneNote Phishing	
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EXTERNAL EMAIL: EVALUATE			<u> </u>
Your Action List has an eDoc(electronic document) that needs your attention:			
Document ID: 4688			
Initiator: Alam, Jawed Type: Add/Modify ProposalDevelopmentDocument			
Title: Inhibition of breas; Proposal No: 55; PI: Augusto Ochoa; Sponsor: NIH - NCI (National Cancer Ins	itute); Due Date: 08/02/2021		
To respond to this eDoc:			
Go to https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Flsuhsc-sbx.kuali.co%2F 3DdisplayActionListView&data=04%7C01%7Cjalam%40lsuhsc.edu%7Cd50454d619d14c7685ca08d94			
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Or you may access the eDoc from your Action List:			
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7C1000&sdata=cKqGrUr02bkpxZSJoxtsaWTcvp1WFLnl7YOqaP73W3w%3D&reserved=0, and the	n click on the numeric Document ID: 4688 in t	he first column of the List.	
To view the route log of this document:			
Go to https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Flsuhsc-sbx.kuali.co%2F 7Cd50454d619d14c7685ca08d9488d3f0e%7C3406368982d44e89a3281ab79cc58d9d%7C0%7C0%7C6376			
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To change how these email notifications are sent(daily, weekly or none): Go to https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Flsuhsc-sbx.kuali.co%2F	es%2Fkew%2FPreferences.do&:data=04%	67C01%7Cjalam%40lsuhsc.edu%7Cd50454d619d14c	27685ca08d9488d3f0e%
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2. You will be asked to sign into Kuali using your LSUHSC credentials. *The user name is your full LSUHSC email address*.



- 3. You will be taken directly to the Proposal Summary page of the Summary/Submit panel of the document.
 - a) You can review a summary of each panel of the proposal by clicking on the tabs at the top of the page.
 - b) Note: There will be no entries in the Keywords section. This information is collected in the Supplemental Info section.
 - c) To review attachments click on the Attachments tab and then click the Internal tab. Information to be reviewed by the Office of Innovation & Partnership or Properties & Facilities will typically be found in the Attachments panel.
 - d) You may also review detailed information in each panel by clicking on the tabs in the left side menu.

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	Questionnaire		Proposal Summ	oposal Summary							
	D Budget		Title			Inhibition of breast cancer metastasis					
	Access		Principal Investigator			Augusto Ochoa					
	Supplemental Information		Lead Unit			NO1497400 - Center of excellence-Cancer					
			Proposal Type			Follow-up Submission					
	🕞 Summary/Submit		Activity Type			Research					
0	Notifications History	_	Proposal Number			55					
			Project Start Date			01/01/2022					

	Submit					
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Supplemental Information	Download All					
Summary/Submit	File	Туре *	Status	Description	Uploaded By	Posted Timestamp
Notifications History	1 combinepdf-signed.pdf	Other JIT-Requested Docum	nent Complete		Alam, Jawed	07/16/2021 10:14 AM

4. Scroll to the bottom of the **Proposal Summary** page to see the various action items.

	Sponsor Deadline Type	Receipt	
	behalf of the undersigned, to any person for influencing or Member of Congress in connection with the awarding of ar extension, continuation, renewal, amendment, or modificat will be paid to any person for influencing or attempting to in Congress in connection with this Federal contract, grant, Ic	d certifies, to the best of his or her knowledge and belief, that. (1.) No Federal appropriated funds have been paid or will be paid, by or on tempting to influence an officer of employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into any cooperative agreement, and the n of any Federal contract, grant, loan, or cooperative agreement. (2.) If any funds other than Federal appropriated funds have been paid or unnce an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a nor cooperative agreement, the undersigned shall complete and submit Standar Formul. Un" Socious reference from to Report Lobbying," in	
0	subgrants, and contracts under grants, loans and cooperat	equire that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, e agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon	
()	31, U.S. Code. Any person who fails to file the required cert	or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Sections 1352. Title lication shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure. CERTIFICATION OSURE: As described in Chancellor's Memorandum #35, each Investigator is required to disclose any significant financial interest of the	
ሳ	Investigator that would reasonably appear to be directly an	significantly affected by the research or educational activities funded, or proposed for funding. Regardless of the above minimum t interest, may choose to disclose any other financial or related interest that could present an actual conflict of interest or be perceived to	
	present conflict of interest. Disclosure is a key factor in pro	cting one's reputation and career from potentially embarrassing or harmful allegations of misconduct. Each person who has significant 5 Significant Financial Interests Disclosure Form, attach all required supporting documentation, including a copy of any relevant PM-11	
	disclosure, and place the materials in a sealed envelope a	tressed to the Office of Research Services and clearly marked "CONFIDENTIAL Significant Financial Interests Disclosure", and identified with	
>	Send Adhoc Ad Hoc Recipients Approve	Return View Route Log Recall More Actions Close	

5. If you need the **initiator** to revise the proposal or provide additional information, click the **Return** button. Make sure to describe the **reason for returning** the proposal to the **initiator**.

K	Kuali Research			
		Асцину туре		
	Notifications History	Proposal Number	Please Select	
Q		Project Start Date	Are you sure you want to return this	
¢.		Project End Date	document?	
-		Include Subaward(s)?	Return Reason: *	
Θ		Sponsor Name		r institute)
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		Sponsor Deadline Date	Attachment: Choose File No file chosen	
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		CERTIFICATION REGARDING LOBBYING. The un of the undersigned, to any person for influencing or of Congress in connection with the awarding of any continuation. renewal amendment. or modification		pe and belief, that (1) No Federal appropriated funds have been paid or will be paid, by or on behalt agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member is making of any Federal loan, the entering into any cooperative agreement, and the extension, the agreement. (2) if any funds other than Federal appropriated funds have been paid or will be paid to

6. If you do not require revisions to the proposal but would like to discuss any matter with an individual involved in creating or approving the proposal (or otherwise has access to the proposal in Kuali), click the More Actions button and select Send Notification.

6 0	Investigator that would reasonably appear to be directly and significantly affected by the research or e requirement, a facuity or staff member, in his or her own best interest, may choose to disclose any oth present conflict of interest. Disclosure is a key factor in protecting nork's reputation and career from po financial interests requiring disclosure must complete a CM35 Significant Financial Interests Disclosur disclosure, and place the materials in a sealed envelope addressed to the Office of Research Servicer the name of the person making the disclosure the name of the sponsor, and the proced name.	her financial or related interest that could present an actual conflict of interest or be perceived to obentially embarrassing or harmful allegations of misconduct. Each person who has significant re Form, attach all required supporting documentation, including a copy of any relevant PM-11
	Send Adhoc Ad Hoc Recipients Approve Return View Route Log Submit to 3	Sponsor More Actions. Close Send Notifications
>		Bianket Approve

 Select Employee, enter the person's name, user name or email address and press Search for Recipients.

	La Super User Actions	Branssal Number 60			
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					yee of Congress, or an employee of a Member
		User Name			cooperative agreement, and the extension, priated funds have been paid or will be paid to
		Email Address	user@domain.com		in employee of a Member of Congress in m to Report Lobbying," in accordance with its
0		Office Phone			ng subcontracts, subgrants, and contracts n of fact upon which reliance was placed when 352, Title 31, U.S. Code. Any person who fails to
0		Home Unit		Q	EGARDING SIGNIFICANT FINANCIAL
υ		Campus Code		Q	nvestigator that would reasonably appear to be faculty or staff member, in his or her own best
Ŭ				~	erest. Disclosure is a key factor in protecting disclosure must complete a CM35 Significant
\odot					s in a sealed envelope addressed to the Office
			Search for Recipients Cancel		disclosure, the name of the sponsor, and the
>		Send Admoc Ad Hoc Recipients			

8. Select the correct person from the list and press Add Recipients.

!! २	Super User Actions	Send Notifications	ica mais					×	^
		Only the top 200 results were r	eturned. If you cannot find	l what you are looking	g for, please refine th	e search criteria			
æ		Full Name:	User ID: 🗘 Email /		Onit Number:	Unit Name:	Organization:	≎ City:≎	
۰		 Gabriela Dominguez Showing 1 to 1 of 1 entries 	gdomi1 gdomi1	@lsuhsc.edu			First Previous 1	Next Last	
			^	dd Recipients G	o back Cancel				Is have been paid or will be paid, by or on behalt yee of Congress, or an employee of a Member
		continuation, renewal, amendme							cooperative agreement, and the extension, opriated funds have been paid or will be paid to

9. Add More Recipients if desired. The subject line will be auto-populated with the Proposal # and title. Compose the message and press Send Notifications.

∎ α	Proposal Development Proposal: #67 PI: Lucio Miele		Send Notifications ×		Document Info Doc Nbr: 4921 S2S Connected: Initiator: pdaren Status: Approval Pending
۷			Recipient Actions		more
œ			Gabriela Dorninguez 🕅	Medusa 🕮 Budget Versions 🖉 Data Override	S Link (2) Help -
•		Submit	Subject: Proposal #07: Novel transcriptional notch inhibitor in endocrine-refractory breast cancer		
٠	Basics >		Message:		
	1 Key Personnel		Will you please confirm that IRB review is not necessary for this project? Thx,	Approved	
	V Compliance		manufacture of the set proposed in the		
	Attachments	Proposal Summary Pen			
	⑦ Questionnaire	Proposal Summa			
	D Budget	Title	Send Notifications Add More Recipients Cancel		
		Principal Investigator	Lucia Miata		

10. The email message will be sent to the selected recipient(s) and you can confirm the notification in Notification History.

Basics >	•			
L Key Personnel	Date Created	Recipients	Subject	Message
✓ Compliance	07/26/2021 02:41 PM	Imiele	Proposal Person Certification Completed	Proposal Person Certification completed by Proxy. Proposal Details as follows: Document Number: 4921
Attachments				Proposal Number: 67 Proposal Title: Novel transcriptional notch inhibitor in endocrine-refractory breast cancer
Questionnaire				Principal Investigator: Lucio Miele Lead Unit: NO1102000 - Genetics
O Budget				Sponsor: 100591 - NIH - NCI (National Cancer Institute) Deadline Date: 08/26/2021
Access	07/26/2021 02:41 PM	pdaren	All Proposal Persons Certification Completed for 67	All of the Proposal Person Certifications are completed. Proposal Details as follows: Document Number: 4921
Supplemental Information				Proposal Number: 67 Proposal Title: Novel transcriptional notch inhibitor in endocrine-refractory breast cancer
Summary/Submit				Principal Investigator: Lucio Miele Lead Unit: NO1102000 - Genetics
Super User Actions				Sponsor: 100591 - NIH - NCI (National Cancer Institute) Deadline Date: 08/26/2021
Notifications History	08/06/2021 12:07 PM	gdomi1	DUA	Can yo help me with this?
	08/06/2021 01:12 PM	gdomi1	Proposal #67	Will you please confirm that IRB review is not necessary for this project? Thx.
				ose

- 11. When the proposal meets your approval, click Approve. See figure at Step 4.
 - a) If the proposal was submitted with an unfixed item, a pop-up window will describe the item. The severity of the deficiency will be a Warning (proposals with Errors cannot be routed for approvals).
 - b) If you want the **Initiator** to fix the Warning, then **Return** the proposal as described above.
 - c) Otherwise, click Approved With Warnings to continue routing the proposal.

Kuali Rese	arch							
	Prime Spon	sor						
	Data Validation						Turn Off	
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	Area	≎ Section ≎	Description	÷	Severity	÷	Actions	e awarding of any
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	Showing 1 to 1 of 1 entries					P	revious Next	rant, loan, or cordance with its wards at all tiers ertify and disclose entered into.
			Approve With Warnings Close					Code. Any person who uch failure. 35, each Investigator is

12. An email notification will be sent to the next approver in the routing path (see next page).

- a) The **Return** and **Approve** buttons will no longer be available to you but you will have the option to **Recall** your previous action.
- Kuali Research ✓ Compliance Saved Routing Attachments Questionnaire Ż Proposal Summary Personr Supplemental Info Budget Summa D Budget **Proposal Summary** Access Title Inhibition of breast cancer metastasis language Supplemental Information Principal Investigato Augusto Ochoa Summary/Submi Lead Unit NO1497400 - Center of excellence-Cance Notifications History Proposal Type Follow-up Submission Activity Type Research Proposal Number 55 Project Start Date 01/01/2022 12/31/2025 0 Project End Date Include Subaward(s)? Sponsor Name NIH - NCI (National Cancer Institute) Prime Sponsor Name Sponsor Deadline Date 08/02/2021 0 Receipt Sponsor Deadline Type re Actions . Close Ad Hoc Recipients View Route Lou Recall
- b) Click Close to log out of the proposal.

