

# Proposal Development & Routing in Kual Research (KR)

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# Learning Objectives

Learn how to:

- Create a System-to-System (S2S) proposal
- Review and approve a proposal
- Copy a proposal
- Search for proposals

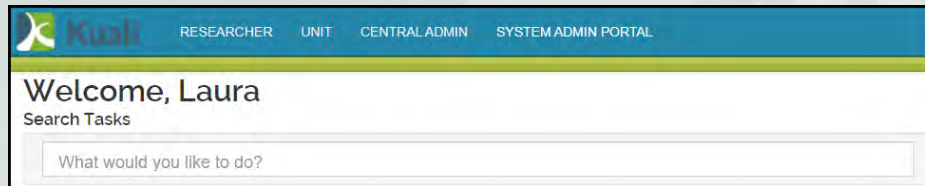
# Creating a System-to-System Proposal in KR

# Key features of S2S

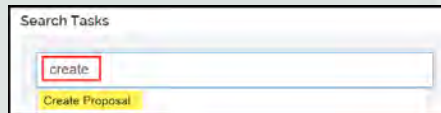
- No double entry of information
  - Grants.gov forms are automatically populated with data entered into the KR proposal
- KR provides data validations to assist with ensuring that the required data, forms, and attachments are included, prior to submission
  - Includes NIH validation service
- Status updates from Grants.gov are displayed in the S2S area of the proposal
- NIH Image Service gives a preview of the NIH proposal, as it will appear in eRA Commons.

# Creating a PD

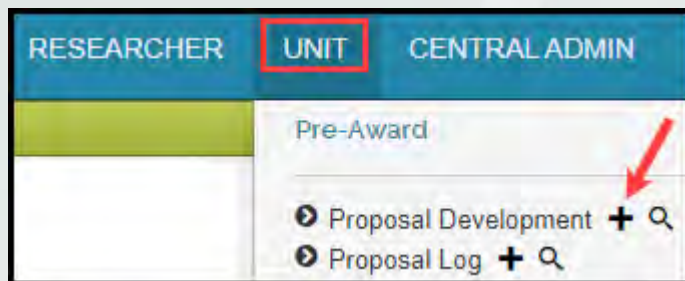
The Kualu Research landing page is a welcome screen with a **Search Tasks** bar.




- To create a new PD, start typing the word “create” in the task bar and options will appear. Select **Create Proposal**.



- You can also create a new PD through the Researcher and Unit links.



 = Create new

# Required Fields to Save the Document

## Create Proposal

\* Indicates required fields

Proposal Type: *	<input type="text" value="select"/>
Lead Unit: *	<input type="text" value="select"/>
Activity Type: *	<input type="text" value="select"/>
Project Dates: *	<input type="text" value="mm/dd/yyyy"/> to <input type="text" value="mm/dd/yyyy"/>
Project Title: *	<input type="text"/>
Sponsor: *	<input type="text"/> <input type="button" value="Q"/>
Sponsor Deadline Type: *	<input type="text" value="Nothing selected"/>

- There are required fields that must be entered in order to create and save a Proposal Development document

# Required Fields to Save the Document

## 1. Proposal Type

Proposal Type	Used when...
Award Revision	Gathering approvals for revisions that take place after a proposal is submitted and throughout the lifetime of an award. This Type is used to gather approvals only and does not create a new Institutional Proposal or make changes to an active award.
Continuation	Submitting S2S non-competing applications for additional funding/budget period for awarded projects. Currently, this Proposal Type should only be used for USDA progress reports that are submitted System-to-System.
New*	New proposal submission.
No Money Agreement	Routing an agreement for approval that does <b>not</b> include awarded funds (e.g. cost share agreement).
Pre-Proposal	A pre-application or Letter of Intent that is required by the sponsor and the requirements of the pre-application must have institutional approval (e.g. cost share). Also used for pre-proposals submitted System-to-System.

# Required Fields to Save the Document

Proposal Type	Used when...
Renewal*	A new application requesting additional funding for a period subsequent to what was provided by the current award. Used for System-to-System applications.
Research Gift	Funds are transferred to MSU without any valuable consideration or compensation to the donor. Gifts of more than \$5,000 for the support of research should be routed through a PD document.
Resubmission*	Resubmitting a previously unfunded proposal. Used for System-to-System applications.
Revision*	Submitting System-to-System for the following reasons: changes to financial award obligations; competing revisions; non-competitive administrative supplements; and NIH transfer requests.
Task Order	Submitting a proposal or receiving an award under a master agreement.

\* Include a Change/Corrected option for S2S proposals.



# Required Fields to Save the Document

## 2. Lead Unit

- Select the department (Organization Code) that the lead PI is appointed to at MSU.
- Options appearing in the dropdown list are unit(s) that the individual has been granted access to create proposals for (based on access provisioning / ARMs)
- **Once saved, cannot be changed!**

# Required Fields to Save the Document

## 3. Activity Type

Activity Type	Definition
Construction	A proposal to undertake or manage the undertaking of a construction or renovation project.
Education/ Instruction	Proposals with the primary purpose of training or providing instruction.
Fee-for-Service	These are service projects for which an external client requests a deliverable generated using known practical applications of standard procedures and established theories, methods and standard experiments using special or unique MSU research capabilities. The results of such work are of specific interest to the client and normally involve a set fee according to a published rate schedule routinely charged to all potential customers, off-the-shelf tools and established protocols. Fee-for-service work does not require original, creative, or scholarly analyses or non-standard interpretation of data sets by MSU faculty, staff or students engaged in the work.

# Required Fields to Save the Document

## 3. Activity Type, cont.

Activity Type	Definition
Fellowship	A mechanism to provide institutional research training opportunities to trainees at the undergraduate, graduate, and postdoctoral levels. Typically, the fellow is not an employee of the university throughout the period of their fellowship.
Public Service	A project where the primary purpose is to provide a service rendered in the public interest or geographically extends the resources of the institution to entities or persons otherwise unable to take advantage of such resources.
Research	An investigation aimed at discovery and interpretation of facts, revision of accepted theories in light of new facts, development of new analytical and experimental protocols, or practical applications of such new theories, analysis, data gathering and experiments.
Student Services	The intent of the proposal is to request financial assistance for students or student programs.

# Required Fields to Save the Document

## 4. Project Dates:

- Project Start and End Dates

## 5. Project Title

- If the title is unknown, you can use “TBD” to pass the validation. Remember to change it!

## 6. Sponsor

- If the sponsor is not listed, select To Be Named as the sponsor and complete the [Adding Sponsors web form](#) on SPA’s website to request that the sponsor be added
- Using To Be Named allows you to continue working on your proposal, but will prevent you from submitting the proposal for approval

## 7. Sponsor Deadline Type

- Deadline Date - if the solicitation includes a required deadline
- No Deadline Date - if there is no required deadline
- Click **Save and Continue**

# Creating a PD

Once created, the PD# will display at the top of the screen and additional Links and Options become available.

- Additional fields are added within Proposal Details

Proposal Development

**Proposal: #56404**  
PI: *Not yet assigned*

**Document Info**  
Doc Nbr: 28712078  
S2S Connected: no  
Initiator: cooklau1  
Status: In Progress  
[more...](#)

**Links:** Primarily replace the Proposal Actions and Medusa tabs

Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

**Options:** Replace the tabs that ran across the top of the screen

**Proposal Details**

Basics

- Proposal Details
- S2S Opportunity
- Sponsor & Program Information
- Organization and Location
- Key Personnel
- Questionnaire
- Compliance
- Attachments
- Budget
- Access
- Supplemental Information
- Summary/Submit
- Super User Actions
- Notifications History

Proposal Type: \* New

Lead Unit: 10059000 - RESEARCH AND INNOV

Activity Type: \* Research

Project Dates: \* 03/01/2022 to 02/28/2025

Project Title: \* Laura is Creating a PD

Sponsor: \* 014351 National Inst of Health

Prime Sponsor Code:

Keywords: Nothing selected

Sponsor Deadline Type: \* No Deadline Date

# S2S

The screenshot displays the MSU Proposal Development System interface. The main content area shows "Proposal: #56433" for PI Jennifer Johnson. A left sidebar contains a navigation menu with the "S2S Opportunity" option highlighted by a red box. The main content area includes a "Document Info" section, a "Document was successfully saved" message, an "Opportunity Search" section with a search input field, and a "User Attached Forms" section with an "Add User Attached Form" button. At the bottom, there are buttons for "Back", "Save", "Save and Continue", "Close", and "Create negotiation".

S2S sub option will only display when a federal sponsor is selected.

# S2S

- To attach the Grants.gov opportunity
  - Click the *S2S Opportunity* sub option
  - Click the *Find an opportunity* link
  - Enter the Opportunity ID
    - The Opportunity ID must be entered exactly as identified in the solicitation. Wildcard searches do not work in these fields.
  - Click *Search*
  - Click *Select* for the desired opportunity

# S2S

- Opportunity tab – contains the following:
  - Information about the linked Grants.gov opportunity
  - Submission Type should be selected as follows:
    - Application (default) – first submission of this package
    - Preapplication – for pre-proposals or letters of intent
    - Change/Corrected Application – resubmitting a corrected proposal package
  - S2S Revision Type
    - Only applicable when the Proposal Type is Revision



# S2S

- **Forms tab:**
  - **Form names** are a hyperlink to the fillable form
  - Review the forms, check the boxes in the Include column for all forms that should be included in the proposal submission.
    - **Mandatory** – forms that must be included in the proposal
    - **Include** – forms that are not required for all proposals, but may be conditionally required – based on the sponsor’s solicitation and the project being proposed
    - **Desc** – notes whether the forms are mapped in the PD document (available) or will need to be user attached
  - **Select column** – check the boxes next to the forms you’d like to print to pdf
  - **NIH e-application button** allows users to view the proposal as it will appear in eRA Commons

# S2S

## ■ Submission details

- Contains the status information from Grants.gov; populated once the proposal has been submitted
  - Will return the Grants.gov zip file after submission

### Opportunity Search

[Opportunity](#)
[Forms](#)
[Submission Detail](#)
[User Attached Forms](#)

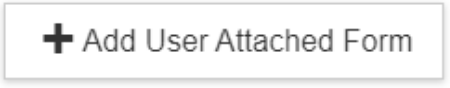
### Submission Detail

[Refresh](#)

Received Date:	07/08/2022 03:22 PM
Last Modified Date:	07/08/2022 03:22 PM
Status:	Validated
S2S Tracking Id:	GRANT13677308
Agency Tracking Id:	
Comments:	Validated
Grant Submission Package:	<a href="#">Grant Submission.zip</a>
Grant Application XML:	<a href="#">Grant Application.xml</a>
Attachments:	58186-N-1_ProjectNarrative 58186-N-7_Absolute_Priorities 58186-N-4_CCAMPIS_Program_Profile 58186-N-6_ED_GEPA427_Attachment 58186-N-2_ED_Abstract_Attachment

# S2S

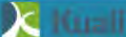
## ■ User Attached Forms

- Click on the form name from the Forms tab
- Fill out the form according to the sponsor's instructions and save it on your computer or network drive
- Click  + Add User Attached Form
- Enter a Description and click the choose file button, select the completed form, and click open
- Click the add button
- The system will validate that the required information has been completed on the form; an error will be given if any required information is missing on the form
- Only the fillable version of a form can be attached
- Instructions can be found on the [User Attached Forms](#) website



*User Attached Forms are ONLY attached in this section of the proposal and not on the Attachments option*

# Sponsor & Program Information

 RESEARCHER UNIT CENTRAL ADMIN COI SYSTEM ADMIN PORTAL
GET HELP

Action List Doc Search User: barteram

Proposal Development

## Proposal: #57470

PI: Jennifer Hodbod

**Document Info**  
 Doc Nbr: 29332516  
 S2S Connected: no  
 Initiator: barteram  
 Status: In Progress  
[more...](#)

✓ Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

### Sponsor & Program Information

Document was successfully saved

**Basics**

- Proposal Details
- Sponsor & Program Information
- Organization and Location
- Key Personnel
- Questionnaire
- Compliance
- Attachments
- Budget
- Access
- Supplemental Information
- Summary/Submit
- Notifications History

**Target Date:**

**Sponsor Deadline Time:**

**Notice of Opportunity:**

**Opportunity ID:**

**Opportunity Title:**

**Does this proposal include subaward(s)?:**

**Sponsor Proposal ID:**

**Sponsor Div Code:**   
Must be 8 characters long

**Sponsor Program Code:**

**NSF Science Code:**

**Anticipated Award Type:**

**Agency Routing Identifier:**

**Prev Grants.Gov Tracking ID:**

CFDA

CFDA Number *	CFDA Program Title Name	Actions
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Back Save **Save and Continue** Close

# Sponsor & Program Information

- Click show on the *Sponsor & Program Information* sub option. Focus primarily on the following fields:
  - **Opportunity ID:** For S2S, this field will auto-populate
  - **Does this proposal include subaward(s)?:** This field must be answered to pass validations.

# Organization and Location

- Applicant Organization – where users will select the HFH + MSU HS organization

Document was successfully saved

RESEARCHER UNIT CENTRAL ADMIN COI SYSTEM ADMIN PORTAL

Basic

Proposal Details

S2S Opportunity

Sponsor & Program Information

Organization and Location

Key Personnel

Questionnaire

Compliance

Attachments

Budget

Access

Supplemental Information

Summary/Submit

Super User Actions

### Organizations & Locations

Applicant Organization Performing Organization Performance Site Locations Other Org

#### Applicant Organization

Details Select Different Organization

Organization Name	Michigan State University
Address Line 1	426 Auditorium Road Room 2
Address Line 2	
Address Line 3	
City	East Lansing
State	MI
Postal Code	48824-2600

+ Add Congressional District

MI-008

Back Save Save and Continue Close

Applicant Organization will default to Michigan State University

RESEARCHER UNIT CENTRAL ADMIN COI SYSTEM ADMIN PORTAL

Action List Doc Search

Data Validation (off) Print Copy Medusa Hierarchy Budget Versions

### Organizations & Locations

Applicant Organization Performing Organization Performance Site Locations

#### Applicant Organization

Details Select Different Organization

Organization Name	Henry Ford Health+Michigan State University Health Sciences
Address Line 1	426 Auditorium Road
Address Line 2	
Address Line 3	
City	East Lansing
State	MI
Postal Code	48824-2600

+ Add Congressional District

MI-007

User will use lookup to pull in Henry Ford Health + Michigan State University Health Sciences organization, Organization #127729

# Organization and Location

- In the **Performing Organization** tab, search for and select Henry Ford Health as the Performing Organization.

The screenshot shows the Kuali system interface. The top navigation bar includes the Kuali logo and links for RESEARCHER, UNIT, CENTRAL ADMIN, COI, and SYSTEM ADMIN PORTAL. A secondary bar shows 'Data Validation (off)' and a 'Print' icon.

The main content area is titled 'Organizations & Locations' and has four tabs: 'Applicant Organization', 'Performing Organization' (selected), 'Performance Site Locations', and 'Other Organizations'. Under the 'Performing Organization' tab, there are two buttons: 'Details' and 'Select Different Organization'.


The 'Performing Organization' section displays the following details:

Organization Name	Michigan State University
Address Line 1	426 Auditorium Road Room 2
Address Line 2	
Address Line 3	
City	East Lansing
State	MI
Postal Code	48824-2600

Below the details, there is a '+ Add Congressional District' button and a dropdown menu showing 'MI-008'.

At the bottom of the page, there are five buttons: 'Back', 'Save', 'Save and Continue' (highlighted in blue), 'Close', and 'Create Negotiation'.

# Organization and Location

- Click **Performance Site Location** tab or **Other Organizations** tab – to add additional performance sites for subawardees:
  - Click on [Add Performance Site](#)
  - Enter the search criteria
  - Click search; click Return Selected next to the appropriate record
  - Click Add Congressional District 
  - Select the applicable State from the dropdown (or 00 if foreign)
  - Enter the number portion only in the District Number field (e.g. 008)
  - Click [Add](#)
- If the organization is not found in the [Performance Site Locations](#) or [Other Organizations](#) search, email the KR Helpdesk, [krhelpdesk@msu.edu](mailto:krhelpdesk@msu.edu), to request that they be added.



# Key Personnel

Proposal Development

**Proposal: #6**  
PI: [REDACTED]

**Document Info**  
Doc Nbr: 12346321  
S2S Connected: yes  
Initiator: cooklau1  
Status: In Progress  
[more...](#)

RESEARCHER UNIT CENTRAL ADMIN COI SYSTEM ADMIN PORTAL GET HELP

Action List Doc Search User: cooklau1

Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

Document was successfully saved.

**Key Personnel**

Search for and add key personnel

[Add Personnel](#) [Notify All](#)

Basics

**Key Personnel**

Personnel

Credit Allocation

COI Disclosure

Questionnaire

Compliance

Attachments

Budget

Access

Supplemental Information

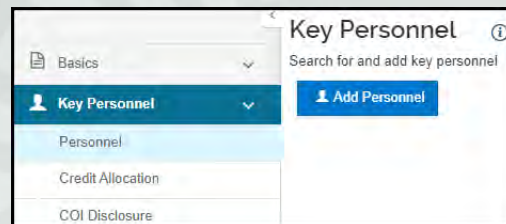
Summary/Submit

Back Save **Save and Continue** Close Create Negotiation

# Key Personnel

## Three sub-options:

- **Personnel** – Where Key Personnel are added.



- **Credit Allocation** – F&A Allocation, Post Award Unit, & Space

The screenshot shows the 'Credit Allocation' interface. It includes a sidebar with 'Credit Allocation' selected. The main area has a 'Post Award Unit' search field and a 'Refresh View' button. Below is a table with the following data:

	F&A Allocation	Post Award Unit	Space
[Redacted]	0	0	0
10059000 - RESEARCH AND INNOV	0	100	0
10034668 - PHYSIOLOGY COM	100	0	100
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Investigator Total:</b>	<b>0</b>	<b>0</b>	<b>0</b>


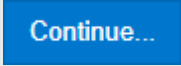

- **COI Disclosure** – Table that shows the status of project based and annual COI disclosures.

The screenshot shows a table titled 'COI Disclosure Information' with the following columns: Key Personnel, Annual Disclosure Date, Project Type, Project Number, Project Based Disclosure Status, and Training Completion Date. The first row contains a redacted name in the 'Key Personnel' column.

Key Personnel	Annual Disclosure Date	Project Type	Project Number	Project Based Disclosure Status	Training Completion Date
[Redacted]					

# Steps for Adding Key Personnel

## 1. Add Personnel

- Click on *Key Personnel* option → *Personnel* suboption
- Click on 
- Choose *Employee* or *Non-Employee* (*HFH faculty will be included as Employees*)
- Enter desired search criteria and click 
- Click the circle next to the desired individual to select them and click 

## 2. Select the Proposal Role

- PI/Contact, PI/Multiple, Co-Investigator, Key Person and click 
  - If Key Person, a role must be entered

Key Person

Key Person's role will be:

# Steps for Adding Key Personnel, Cont.

## 4. When Key Person is selected

- **Non-MSU employees & Non-HFH faculty** will always be added with the Key Person role
  - If the non-MSU employee is a multiple PI on an NIH proposal enter “PD/PI” in the Key Person Role box
  - If they are a Co-Investigator, enter “Co-Investigator” in the Key Person Role box
  - To add non-employees to the address book, email the information to the KR Helpdesk, [krhelpdesk@msu.edu](mailto:krhelpdesk@msu.edu).

## 5. Click the add person button



*To designate a Key Person with the Other Significant Contributor role (NIH designation), Click show on the individuals Person Details subpanel and Check the Other Significant Contributor checkbox.*

# Key Personnel – Order on Grants.gov Forms

- Order of the personnel is the same as on the Grants.gov forms – use the up/down arrows to change the order, if necessary
  - Default order is grouped first by role (PI, Multiple PI or Co-PD/PI, Co-Investigators, Key Persons) and alphabetically by first name within the role groupings
  - Additional PD/Pis and Co-Investigators added as Key Persons should be moved so that they are listed after the PI

# Proposal Person Certification Questions

- MSU employees and HFH faculty with PI, Co-I, Multi-PI, or Co-PD/PI roles must answer the certification questions
- Under the person's name, select *Proposal Person Certification* tab

## Proposal Person Certification

Clear All Answers

Do you certify that 1) information submitted within the referenced proposal are true, complete and accurate to the best of your knowledge / 2) you are aware that false, fictitious, or other fraudulent statements or claims herein may subject you to criminal, civil, or administrative penalties / 3) you accept responsibility for the technical conduct of the project and to provide required progress reports in a timely manner if an award results from this application / and 4) you accept responsibility for ensuring compliance with applicable laws, regulations, policies, and guidelines regarding this proposal and the ensuing award/project? ⓘ

Yes

No

Have lobbying activities been conducted on behalf of this proposal? ⓘ

Yes

No

Are you aware of the current sponsor's requirements related to disclosures of current and pending support (also known as Other Support), and that at a minimum you must disclose ALL support including gifts, grants, and contracts from all foreign and domestic sources including MSU project support? (click More Information for a web address with additional resources) ⓘ

Yes

No

- Can be answered by the investigator prior to routing or during review/approval

# Credit Allocation

- The Credit Allocation sub option is where MSU identifies:
  - F&A Allocation credit
  - Post Award Unit credit
  - Space credit
- PI Profiles will load into the F&A Allocation column along with any Space Credit, if applicable
- Values in the Combined Credit Split panel (across investigators and units) **must** add up to 100%.

	F&A Allocation	Post Award Unit	Space
<b>Personnel</b>			
Personnel			
<b>Credit Allocation</b>			
COI Disclosure			
Questionnaire			
Compliance			
Attachments			
Budget			
<b>Jennifer Hodbod</b>	<input type="text" value="0"/>	0	0
10059973 - SPA OSP PREAWARD	0	100	0
10002241 - COMMUNITY SUSTAIN	100	0	100
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Laura Johnston</b>	<input type="text" value="0"/>	0	0
10059973 - SPA OSP PREAWARD	100	100	100
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Investigator Total:</b>	<b>0</b>	<b>0</b>	<b>0</b>

# Credit Allocation

- Credit is distributed both across investigators, and between the units they are appointed in

Credit Allocation

Document was successfully saved.

Post Award Unit: \*

	F&A Allocation	Post Award Unit	Space
Jennifer Hodbod	<input type="text" value="0"/>	0	0
10059973 - SPA OSP PREAWARD	0	100	0
10002241 - COMMUNITY SUSTAIN	100	0	100
Unit Total:	100	100	100
Laura Johnston	<input type="text" value="0"/>	0	0
10059973 - SPA OSP PREAWARD	100	100	100
Unit Total:	100	100	100
Investigator Total:	0	0	0

Investigator Line

Unit Line(s)



# F&A Allocation – Investigator's Unit(s)

- F&A Allocation between units is populated by that individual's PI Profile.

## Credit Allocation

Document was successfully saved.

Post Award Unit: \*

Please enter unit number or unit name:



Refresh View

	F&A Allocation	Post Award Unit	Space
Jennifer Hodbod	0	0	0
10059973 - SPA OSP PREAWARD	0	100	100
10002241 - COMMUNITY SUSTAIN	100	0	0
Unit Total:	100	100	100
Laura Johnston	0	0	0
10059973 - SPA OSP PREAWARD	100	100	100
Unit Total:	100	100	100
Bruno Basso	0	0	100
10032368 - EARTH ENVIRON SCI	75	100	100
10057500 - KBS MABR	25	0	0
Unit Total:	100	100	100
Investigator Total:	0	0	100

Pre-populated  
by PI Profile

# F&A Allocation – Investigators

- Credit must be entered (distributed) among the investigators listed on the project

## Credit Allocation

Document was successfully saved.

Post Award Unit: \*



Refresh View

	F&A Allocation	Post Award Unit	Space
Jennifer Hodbod	<input type="text" value="60"/>	0	0
10059973 - SPA OSP PREAWARD	0	100	100
10002241 - COMMUNITY SUSTAIN	100	0	0
Unit Total:	100	100	100
Laura Johnston	<input type="text" value="20"/>	0	0
10059973 - SPA OSP PREAWARD	100	100	100
Unit Total:	100	100	100
Bruno Basso	<input type="text" value="20"/>	0	100
10032368 - EARTH ENVIRON SCI	75	100	100
10057500 - KBS MABR	25	0	0
Unit Total:	100	100	100
Investigator Total:	<input type="text" value="100"/>		100

Investigator lines must total 100%

Back

Save

Save and Continue

Close

# Assigning the Post Award Unit

- Use the Post Award Unit field at the top of the Credit Allocation sub option. Select the same unit that was used for the Lead Unit.

## Credit Allocation

Post Award Unit:  COMMUNITY SUSTAIN

	F&A Allocation	Post Award Unit	Space
<b>Jennifer Hodbod</b>	<input type="text" value="60"/>	100	0
10059973 - SPA OSP PREAWARD	0	0	100
10002241 - COMMUNITY SUSTAIN	100	100	0
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Laura Johnston</b>	<input type="text" value="20"/>	0	0
10059973 - SPA OSP PREAWARD	100	100	100
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Bruno Basso</b>	<input type="text" value="20"/>	0	100
10032368 - EARTH ENVIRON SCI	75	100	100
10057500 - KBS MABR	25	0	0
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Investigator Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>

# Assigning the Post Award Unit

- Click *Save* and KC will fill in Post Award Column for you

## Credit Allocation

Document was successfully saved.

Post Award Unit: \* 10002241

COMMUNITY SUSTAIN



Refresh View

### F&A Allocation

### Post Award Unit

### Space

Jennifer Hodbod	<input type="text" value="60"/>	100	0
10059973 - SPA OSP PREAWARD	0	0	100
10002241 - COMMUNITY SUSTAIN	100	100	0
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
Laura Johnston	<input type="text" value="20"/>	0	0
10059973 - SPA OSP PREAWARD	100	100	100
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
Bruno Basso	<input type="text" value="20"/>	0	100
10032368 - EARTH ENVIRON SCI	75	100	100
10057500 - KBS MABR	25	0	0
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Investigator Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>

Back

Save

Save and Continue

Close

# Space Credit

- Space credit is assigned in the Space column

## Credit Allocation

Document was successfully saved.

Post Award Unit: \* 10002241

COMMUNITY SUSTAIN



Refresh View

F&A Allocation

Post Award Unit

Space

Jennifer Hodbod	<input type="text" value="60"/>	100	0
10059973 - SPA OSP PREAWARD	0	0	100
10002241 - COMMUNITY SUSTAIN	100	100	0
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
Laura Johnston	<input type="text" value="20"/>	0	0
10059973 - SPA OSP PREAWARD	100	100	100
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
Bruno Basso	<input type="text" value="20"/>	0	100
10032368 - EARTH ENVIRON SCI	75	100	100
10057500 - KBS MABR	25	0	0
<b>Unit Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Investigator Total:</b>	<b>100</b>	<b>100</b>	<b>100</b>

Back

Save

Save and Continue

Close

# Assigning Space

- When there is not an Investigator with a Space profile, KR will make the Space column match the F&A Allocation column automatically
- If an Investigator does need space credit, this should be setup in their [PI Profile](#). KR will automatically complete the space column for any Investigators with a Space profile.

# COI Disclosure

- **COI Disclosure Information Sub option** – where project-based and annual COI disclosure information is displayed.
  - Click **sync** to pull in the most up-to-date information.

Proposal: #58687  
PI: [REDACTED]

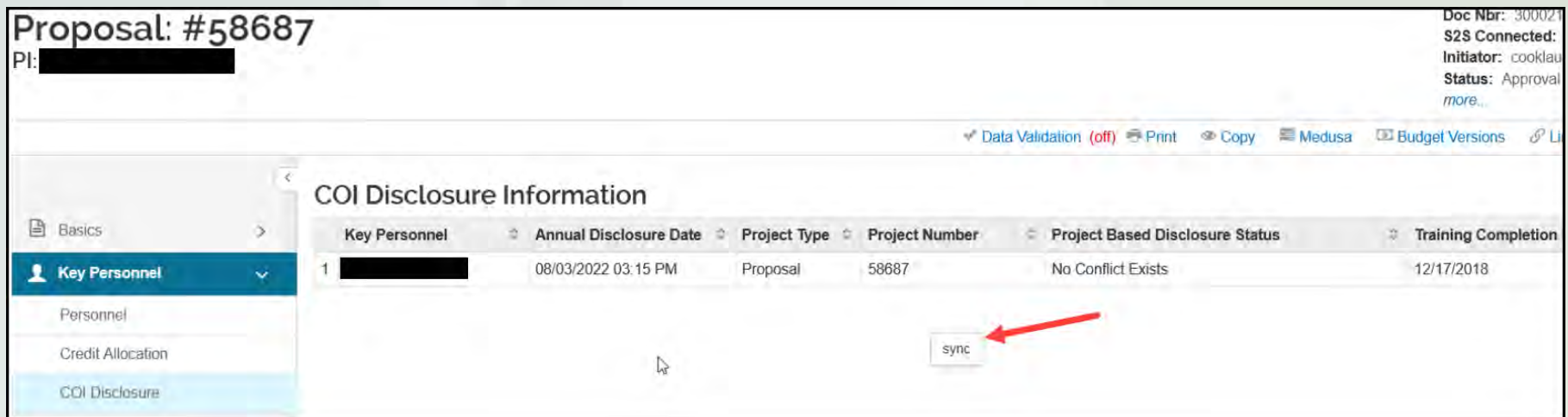
Doc Nbr: 300021  
S2S Connected:  
Initiator: cooklau  
Status: Approval  
more..

Data Validation (off) Print Copy Medusa Budget Versions U

### COI Disclosure Information

Key Personnel	Annual Disclosure Date	Project Type	Project Number	Project Based Disclosure Status	Training Completion
1 [REDACTED]	08/03/2022 03:15 PM	Proposal	58687	No Conflict Exists	12/17/2018

sync



# Questionnaire

The screenshot shows a web application interface for a questionnaire. At the top right, there are utility icons for Data Validation (off), Print, Copy, Medusa, Hierarchy, Budget Versions, Link, and Help. A blue notification bar at the top left states "Document was successfully saved." The main content area is titled "Questionnaire" and "Standard Proposal Questionnaire (Incomplete)". The left sidebar contains a navigation menu with items: Basics, Proposal Details, Sponsor & Program Information, Organization and Location, Key Personnel, Personnel, Credit Allocation, COI Disclosure, Questionnaire (highlighted with a red box), Compliance, Attachments, Budget, Access, Supplemental Information, and Summary/Submit. The main content area contains three questions, each with radio button options for Yes and No:


- Does this project involve human subjects?  Yes  No
- Does the project involve human blood/materials/fluids?  Yes  No
- Does this project involve vertebrate animals?  Yes  No
- Does the project involve recombinant DNA?  Yes  No

At the bottom of the form, there are four buttons: Back, Save, Save and Continue (highlighted in blue), and Close. On the right side of the main content area, there are "Clear" and "Print" buttons.

- Every proposal will contain a standard set of questions that must be answered; these are included in the Standard Proposal Questionnaire
- Additional questionnaires may be required for S2S proposals



# Questionnaire functionality

- KR has intelligent questionnaire functionality – that is, the questions presented may depend on how other questions are answered
  - e.g., Human Subject = Yes – other questions related to clinical research will appear
- The  next to the question provides links to MSU policies or additional information (context) to help answer the question

# Compliance

The screenshot displays a web application interface for "Proposal Development". The main header shows "Proposal: #6" with a status of "PI: Not yet assigned". In the top right corner, "Document Info" includes "Doc Nbr: 12346321", "S2S Connected: yes", "Initiator: cooklau1", and "Status: In Progress". A navigation bar at the top contains options like "Data Validation (off)", "Print", "Copy", "Medusa", "Hierarchy", "Budget Versions", "Link", and "Help". A left sidebar lists various sections: Basics, Key Personnel, Personnel, Credit Allocation, COI Disclosure, Questionnaire, Compliance (highlighted with a red box), Attachments, Budget, Access, Supplemental Information, and Summary/Submit. The main content area shows a notification "Document was successfully saved." and a "Compliance" section with an "Add compliance entry" button. At the bottom, there are buttons for "Back", "Save", "Save and Continue", "Close", and "Create Negotiation".

- Compliance activities requiring special review should be noted on the *Compliance* option

# Compliance, cont.

- Types of special reviews that, if applicable, should be identified at the proposal stage include:
  - Human Subjects\*
  - Animal Use\*
  - International Activities\*
  - Additional Space/Renovations
  - *Export Control – if review is required at the proposal stage*
  - *URO – if inclusion in the URO is determined at the proposal stage*



\* You will receive a validation error if you have marked “yes” to one of these questions on the Questionnaire option and have not made a corresponding entry on the Compliance option.

# Notes for Compliance

- Select the Compliance Type
- Select the Approval Status
  - If Human Subjects or Animal Use approval has not been applied for, select Approval Status of Pending (this will populate the Grants.gov forms appropriately)
- Complete other fields, if applicable
  - Compliance Identifier
  - Application Date
  - Approval Date
  - Expiration Date
  - Exemption # (used only for Human Subjects)
  - Add comments, if desired
- Click *Add Entry*

Additional information for completing entries for human subjects on NIH proposals is available on the [PHS Human Subject and Clinical Trials Form Information Guide](#).

# Attachments

The screenshot displays the Michigan State University Attachments interface. At the top right, there are utility icons for Data Validation (off), Print, Copy, Medusa, Hierarchy, Budget Versions, Link, and Help. The left sidebar contains navigation options: Basics, Proposal Details, Sponsor & Program Information, Organization and Location, Key Personnel, Personnel, Credit Allocation, COI Disclosure, Questionnaire, Compliance, Attachments (highlighted with a red box), Budget, Access, Supplemental Information, and Summary/Submit. The main content area is titled "Attachments" and shows a success message: "Document was successfully saved." Below this, there are tabs for Proposal (0), Personnel (0), Abstracts (0), Internal (0), and Notes (0). The "Proposal (0)" tab is active, showing the text "Add attachments to this proposal" and buttons for "+ Add", "Download All", and "Upload & Add". A "Set All Statuses" dropdown menu is also visible. At the bottom of the interface, there are buttons for "Back", "Save", "Save and Continue", and "Close".

- The *Attachments* option contains documents required for the completion of the PD, such as the narrative, budget justification, biosketches, etc.
- The *Notes* tab is where notes can be added for the proposal

# Attachments, cont.

- Four types of attachments:
  1. **Proposal** – for S2S proposals only. Examples include: research strategy, facilities, budget justification, etc.
  2. **Personnel** – for S2S proposals only. Examples include: biosketches, current & pending support, etc.



*File format is typically pdf (verify sponsor requirements)*



*File names must be unique*



*File name and the Description field must be free of special characters*




*File name should be less than 50 characters*

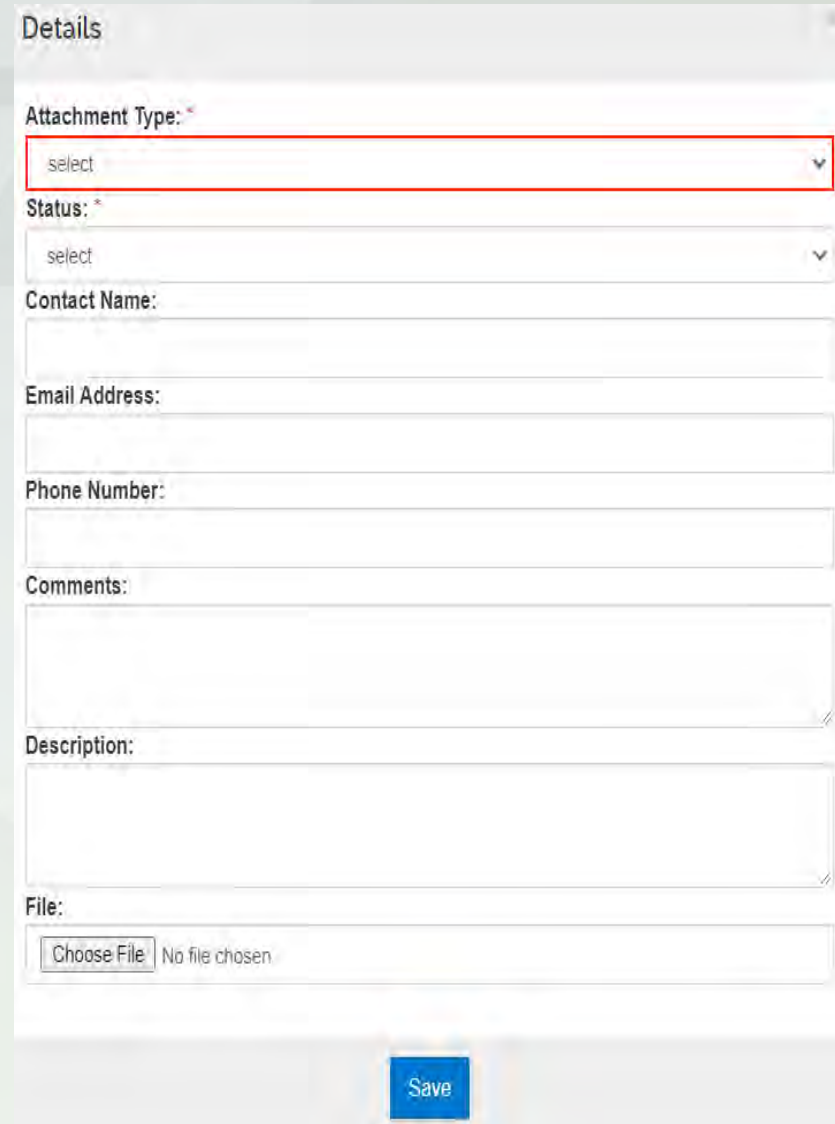
# Attachments, cont.

4. **Internal** – for non-S2S proposals, and all documents relating to MSU business policies or practices in support of the project; e.g., space plan, cost share commitment letter, subrecipient commitment letter, etc.
  - Non-S2S proposals will include all attachments on this tab (including scope of work, budget justification, etc.)

# Adding Attachments

Attachments can be added one at a time, or multiple attachments can be added all at once. To add one:

- Click on the *Attachments* option
- Choose the appropriate tab (Proposal, Personnel, or Internal)
- Click 
- Choose Attachment Type and Status (add description, if required), then 'Choose File'
- Select the file to attach
- Click Save



The screenshot shows a web form titled "Details" for adding attachments. The form contains the following fields:

- Attachment Type:** A dropdown menu with "select" as the current value, highlighted with a red border.
- Status:** A dropdown menu with "select" as the current value.
- Contact Name:** A text input field.
- Email Address:** A text input field.
- Phone Number:** A text input field.
- Comments:** A large text area.
- Description:** A large text area.
- File:** A file selection field with a "Choose File" button and the text "No file chosen".

A blue "Save" button is located at the bottom right of the form.



# Adding Attachments, cont.

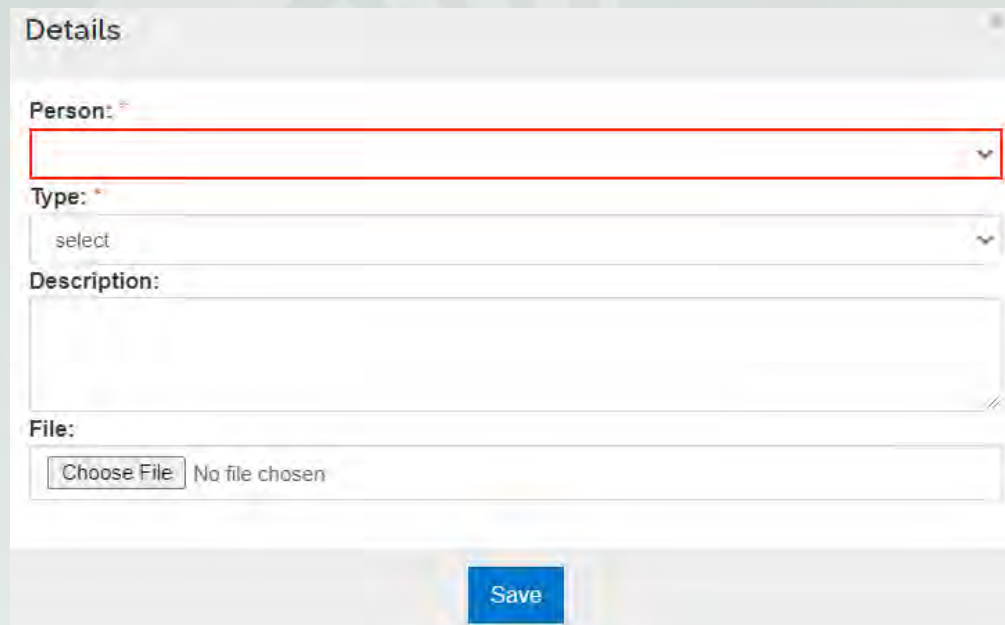
To add multiple attachments at once:

- Click on the *Attachments* option
- Choose the appropriate tab (Proposal, Personnel, or Internal)
- Click Upload & Add
- Select all files to add and click 'open'
- Once files are upload, choose the Attachment Type and Status (add description, if required)
  - Status should be "Complete" before sending the final proposal to HFH Central office.

File	Type *	Status *	Description
1 <a href="#">ReferencesCited.pdf</a>	Bibliography <input type="text" value="Bibliography"/>	Incomplete <input type="text" value="Incomplete"/>	<input type="text"/>
2 <a href="#">OtherResources.pdf</a>	Facilities <input type="text" value="Facilities"/>	Incomplete <input type="text" value="Incomplete"/>	<input type="text"/>

# Adding Attachments, cont.

- Personnel Attachments require the selection of the person



The screenshot shows a 'Details' form with the following fields:

- Person:** A dropdown menu with a red border around it.
- Type:** A dropdown menu with the text 'select' and a downward arrow.
- Description:** A large text area for entering a description.
- File:** A file selection field with a 'Choose File' button and the text 'No file chosen'.

A blue 'Save' button is located at the bottom center of the form.

- Depending on the Attachment Type, a Description may be required

# Replacing attachments

## ■ Proposal Attachments

Attachments

Proposal (1) Personnel (0) Abstracts (0) Internal (0) Notes (0)

Proposal (1)

Add attachments to this proposal

+ Add Download All

Upload & Add

Set All Statuses select

File	Type *	Status *	Description	Uploaded By	Posted Timestamp	Actions
1 Bibliography_Test.pdf	Bibliography	Incomplete		Bane, Amy	08/03/2022 08:59 AM	Details view/edit rights

## ■ Personnel & Internal Attachments

Attachments

Proposal (1) Personnel (1) Abstracts (0) Internal (0) Notes (0)

Personnel (1)

Add attachments to this proposal

+ Add Download All

Upload & Add

File	Person *	Type *	Description	Uploaded By	Posted Timestamp	Actions
1 Biosketch1.pdf	Jennifer Hodbod	Biosketch		Bane, Amy	08/03/2022 09:01 AM	Details

- Click 'Details', then choose updated file
- Update the status (Proposal Attachments only)
- Click save

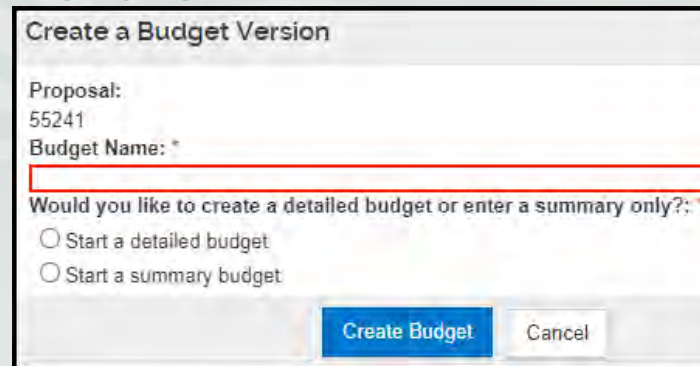
# Adding a Note

- Notes can be added to the proposal on the Notes tab of the Attachments option
  - Can be viewed by anyone that has access to the proposal
  - Can be deleted by the note author, while “In Progress”
  - Do not flow to the Institutional Proposal or Award
  - This is where notes will be added during routing
- Enter the Note Topic
- Type the note into the Note Text field
- Click Add

# Budget

As of November 1<sup>st</sup> all HFH proposals will only include a summary budget in KR.

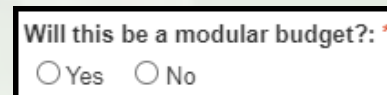
- To add a budget, click the **Add Budget** button, which prompts a Create a Budget Version popup.



The screenshot shows a 'Create a Budget Version' dialog box. It contains the following fields and options:

- Proposal: 55241
- Budget Name: \* (with a red border around the input field)
- Would you like to create a detailed budget or enter a summary only?: \*
- Start a detailed budget
- Start a summary budget
- Buttons: Create Budget (blue), Cancel (grey)

- Enter a name in the Budget Name field
- Select the radio button next to the summary budget option
- If the sponsor is within the NIH hierarchy, an additional Modular Budget question will appear; select **No**



The screenshot shows a question: 'Will this be a modular budget?: \*' with two radio button options: 'Yes' and 'No'.

- Click **Create Budget**

# Creating a Summary Budget

1. You will land on the Periods & Totals option
2. Adjust period dates, if necessary
3. For each budget period, manually enter:
  - Direct Costs
  - F&A Costs
  - Cost Share, if applicable

Budget #2: Trial#2

Created: 04/26/2022  
Proposal: #57509  
more...

Data Validation (all) Budget Settings Hierarchy Summary Budget Versions Autocalculate Periods Help

Return to proposal

Periods & Totals

+ Add Budget Period

Period Start Date	Period End Date	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
01/01/2023	12/31/2023	12.0	23,025.00	15,000.00	8,025.00	0.00	0.00	0.00	0.00	
01/01/2024	12/31/2024	12.0	18,420.00	12,000.00	6,420.00	0.00	0.00	0.00	0.00	
01/01/2025	12/31/2025	12.0	26,852.50	17,500.00	9,352.50	0.00	0.00	0.00	0.00	
Total:			68,307.50	44,500.00	23,807.50	0.00	0.00	0.00	0.00	

Recalculate with changes Reset to period defaults

Save Save and Continue Complete Budget Close

# Finalizing the Budget

- Click Return to Proposal

Periods & Totals

Period Start Date	Period End Date	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
01/01/2023	12/31/2023	12.0	150,000.00	100,000.00	50,000.00	0.00	0.00	0.00	0.00	[Icon]
01/01/2024	12/31/2024	12.0	150,000.00	100,000.00	50,000.00	0.00	0.00	0.00	0.00	[Icon]
01/01/2025	12/31/2025	12.0	150,000.00	100,000.00	50,000.00	0.00	0.00	0.00	0.00	[Icon]
01/01/2026	12/31/2026	12.0	150,000.00	100,000.00	50,000.00	0.00	0.00	0.00	0.00	[Icon]
01/01/2027	12/31/2027	12.0	150,000.00	100,000.00	50,000.00	0.00	0.00	0.00	0.00	[Icon]
<b>Total:</b>			60.00	750,000.00	500,000.00	250,000.00	0.00	0.00	0.00	

- From the Budget Option, click the Action dropdown and select **Include for Submission**

Budgets

The following budgets are linked to this proposal.

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
Summary budget	1	500,000.00	250,000.00	750,000.00	01/01/2023	12/31/2027	Not Approved		Action <ul style="list-style-type: none"> <li>View Summary</li> <li>Copy</li> <li>Print</li> <li>Complete Budget</li> <li><b>Include for Submission</b></li> <li>Delete</li> </ul>

# Access

Proposal Development

**Proposal: #57470**  
PI: Jennifer Hodbod

**Document Info**  
Doc Nbr: 29332516  
S2S Connected: no  
Initiator: barteram  
Status: In Progress  
[more...](#)

[Data Validation \(off\)](#) [Print](#) [Copy](#) [Medusa](#) [Hierarchy](#) [Budget Versions](#) [Link](#) [Help](#)

## Permissions

Document was successfully saved.

[Add User](#)

- Basics
- Key Personnel
  - Personnel
  - Credit Allocation
  - COI Disclosure
- Questionnaire
- Compliance
- Attachments
- Budget
- Access**
- Supplemental Information
- Summary/Submit
- Notifications History

[Back](#) [Save](#) [Save and Continue](#) [Close](#)



# Access

- Allows the individual creating the proposal to grant permission for others to create, modify, or view information in the proposal
- Assigning roles will permit others to interact with the *specific* proposal they are added to; it does not impact other documents in KR
- Proposal roles can be added, changed, or removed
- To assign proposal permissions:
  - Click on the [Access](#) option
  - Type in the MSU net id or perform a lookup to find the person being granted a role
  - Select the role
  - Click add

# Proposal Roles

<b>Aggregator</b>	Automatically assigned to the individual that creates the proposal; Full access to add/edit/delete data and attachments, answer investigator certification questions, submit or delete the proposal
<b>Narrative Writer</b>	Can add/edit/delete proposal data and attachments and view budgets
<b>Budget Creator</b>	Can add/edit/delete proposal data and budgets and view attachments
<b>Viewer</b>	Can view proposal data, attachments, and budget
<b>Delete Proposal</b>	Can delete the proposals that are in progress (proposals that have been submitted for approval or have a negotiation linked to it cannot be deleted)

*Other roles are listed in the system, but are not used*

# Supplemental Information

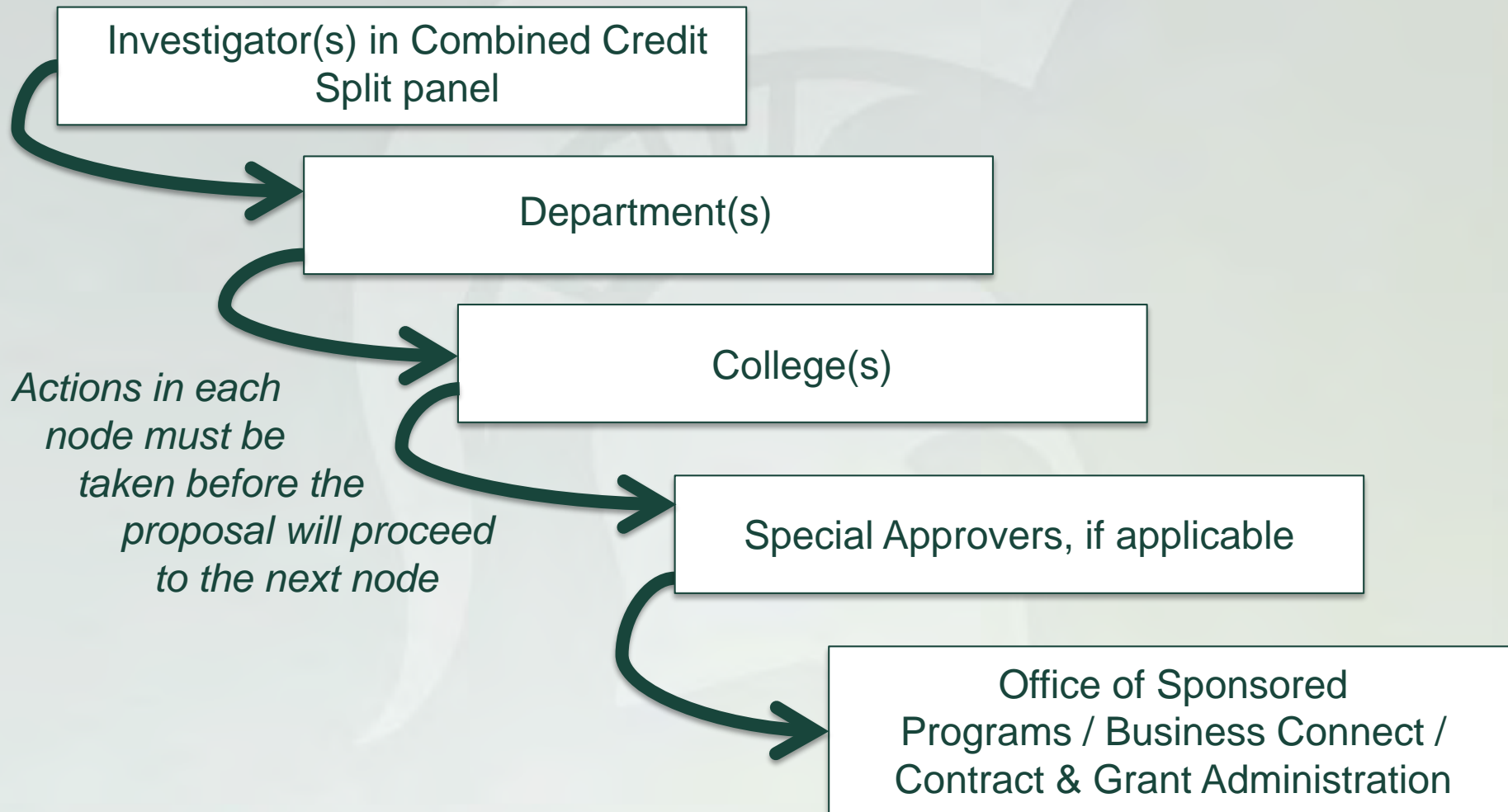
The screenshot displays the Quali system interface. At the top, there is a navigation bar with the Quali logo and menu items: RESEARCHER, UNIT, CENTRAL ADMIN, COI, and SYSTEM ADMIN PORTAL. A secondary bar contains 'Data Validation (off)' and a 'Print' icon. A left-hand sidebar lists various menu items: Basics, Key Personnel, Questionnaire, Compliance, Attachments, Budget, Access, Supplemental Information (highlighted), Summary/Submit, Super User Actions, and Notifications History. The main content area is titled 'Supplemental Info' and features a success message: 'Document was successfully saved.' Below this is the 'HFH+MSU HS Information' section, which includes two questions: 'Will this proposal be submitted through Henry Ford Health+Michigan State University Health Sciences?' (with 'Yes' selected) and 'Is the Lead PI from Henry Ford Health?'. A 'Proposal' text box is visible below the questions. The 'Voluntary Cost Share info:' section contains a text area with a '(200 characters max)' limit. At the bottom, a row of buttons includes 'Back', 'Save', 'Save and Continue' (highlighted), 'Close', and 'Create Negotiation'.

- **Voluntary Cost Share** – voluntary cost share needs to be described, not quantified

# Submitting the Proposal for Approval

- The HFH Central Office will submit the proposal into route
- Only individuals with the role of Aggregator can submit the proposal into route
- KR will automatically route the document to the required approvers
- Once submitted into route, the proposal becomes read-only preventing further changes/modifications, except:
  - Notes can be added by anyone on the route path
  - Attachments can be *replaced*
  - OSP/BC/CGA can make *limited* edits

# Proposal Routing (Nodes)



# Reviewing the Proposal

- Locate the proposal via the Action List or Notification link
  - Individuals will receive an email notification letting them know that they have a pending action
  - Notifications can be turned off in users action list preferences
- Click on the document number link to open the proposal and begin reviewing the content
  - The document will open, displaying the Summary/Submit option, which contains the information that reviewers need to assess
  - Additional information about this can be found in the **Reviewing and Approving** job aids that have been created for Investigators and other approvers
- PI/Co-I: Answer proposal certification questions\*
  - *Principal investigators and Co-Investigators only*
  - *\*Can be answered prior to routing as well*

# Approving the Proposal

- Review the disclaimer statement located at the bottom of the Summary/Submit option
  - Disclaimer statement contains qualifiers for the different types of individuals approving the project
- Click on the desired approval action
  - Approve/Return buttons
- Approvers that appear in multiple nodes can elect to opt out of future approval requests for a given proposal
  - If elected the system will include the approval at all nodes

# Approval Actions

Action	Description
<b>Approve</b>	Indicates agreement with the information provided
<b>Return</b>	Indicates that additional information or corrections are required before approval can be granted <ul style="list-style-type: none"><li>• Requires the approver to add a comment indicating what information needs to be added/corrected</li><li>• Returns the document to the initiator, allowing edits to be made</li><li>• Acknowledgement request sent to previous approvers</li></ul>



# OSP/BC/CGA Approval Actions

- Review the proposal
  - OSP/BC/CGA can perform limited updates in the proposal, should there be an error that does not impact the scope or budget of the project (e.g. a typo in the title)
- Approval Action

# OSP/BC Submission Actions

- Submit to Sponsor (button)
  - Generates the Institutional Proposal
- Submit to S2S (button)
  - Submits the proposal to Grants.gov
    - Only applicable to Grants.gov proposals
    - Action is taken by OSP

# Grants.gov Post Submission Status

- Status transmitted to KR and displayed on the S2S Opportunity suboption > Submission Detail tab
  - Status is transmitted frequently
  - Click refresh for the most recent update (optional)



Submission Detail	
Received Date:	01/12/2022 10:58 AM
Last Modified Date:	01/12/2022 11:06 AM
Status:	Agency Tracking Number Assigned
S2S Tracking Id:	GRANT00766845
Agency Tracking Id:	4570802
Comments:	Agency Tracking Number Assigned
Grant Submission Package:	<a href="#">Grant Submission.zip</a>
Grant Application XML:	<a href="#">Grant Application.xml</a>

- Typical updates include: Submitted to Grants.gov, Received by Agency, Agency Tracking Number Assigned, Rejected with Errors

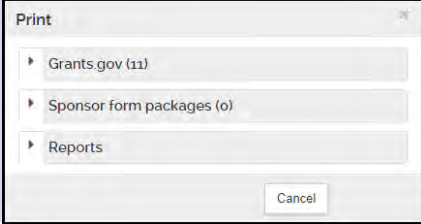
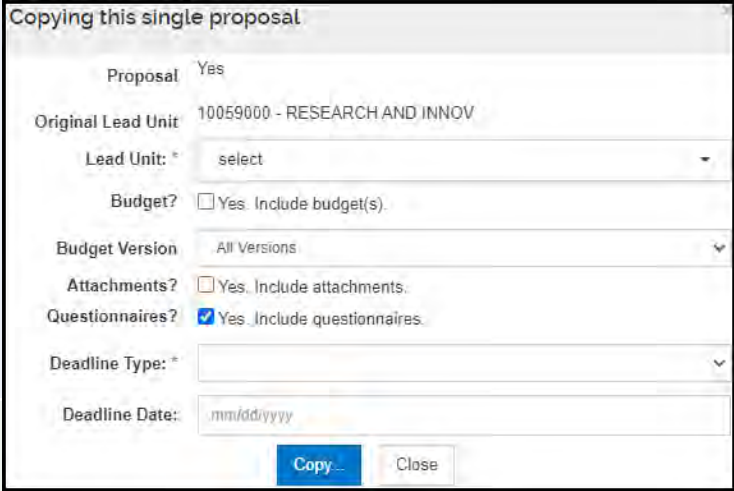
# Links

The PD document has Links at the top of the webpage.

Link Name	Description/Instruction																														
Data Validation	<ul style="list-style-type: none"> <li>• Defaults to <b>off</b></li> <li>• Click the link to change the status</li> <li>• If the status is <b>on</b>, click the link to view the Errors or Warnings</li> <li>• Error/Warning will display in Data Validation window and on the applicable Option/Sub-option webpage.</li> <li>• NIH Validation Service provides errors and warnings from eRA Commons. Validation Service will not appear until all Grants.gov errors are cleared.</li> </ul> <div data-bbox="1383 654 1682 772" data-label="Image"> </div> <div data-bbox="730 1122 1561 1379" data-label="Table"> <table border="1"> <thead> <tr> <th>Area</th> <th>Section</th> <th>Description</th> <th>Severity</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="5"><b>Error</b></td> </tr> <tr> <td>Key Personnel</td> <td></td> <td>The Investigators are not all certified. Please certify Geoff McGregor.</td> <td>Error</td> <td>Fix It</td> </tr> <tr> <td colspan="5"><b>Validation Service Error</b></td> </tr> <tr> <td>PropDev-AttachmentsPage</td> <td>PropDev-AttachmentsPage-PersonnelSection</td> <td>RR_KeyPersonExpanded - 005.53.3 - 919 - The Biographical Sketch attachment is required for Senior/Key Person EMORY EAGLE.</td> <td>Validation Service Error</td> <td>Fix It</td> </tr> <tr> <td>PropDev-AttachmentsPage</td> <td>PropDev-AttachmentsPage-PersonnelSection</td> <td>RR_KeyPersonExpanded - 005.53.3 - 919 - The Biographical Sketch attachment is required for Senior/Key Person Nicholas Majors.</td> <td>Validation Service Error</td> <td>Fix It</td> </tr> </tbody> </table> </div>	Area	Section	Description	Severity	Actions	<b>Error</b>					Key Personnel		The Investigators are not all certified. Please certify Geoff McGregor.	Error	Fix It	<b>Validation Service Error</b>					PropDev-AttachmentsPage	PropDev-AttachmentsPage-PersonnelSection	RR_KeyPersonExpanded - 005.53.3 - 919 - The Biographical Sketch attachment is required for Senior/Key Person EMORY EAGLE.	Validation Service Error	Fix It	PropDev-AttachmentsPage	PropDev-AttachmentsPage-PersonnelSection	RR_KeyPersonExpanded - 005.53.3 - 919 - The Biographical Sketch attachment is required for Senior/Key Person Nicholas Majors.	Validation Service Error	Fix It
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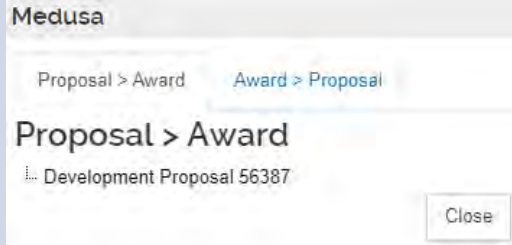
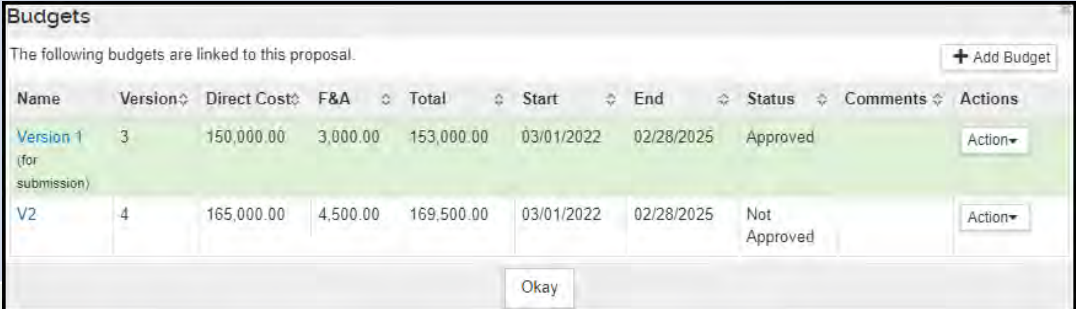
# Layout of Proposal Development

Data Validation (off)
  Print
  Copy
  Medusa
  Hierarchy
  Budget Versions
  Link
  Help

Link Name	Description/Instruction
Print	Prints different sections of the proposal. 
Copy	Copy all or parts of a PD document into a new PD. 

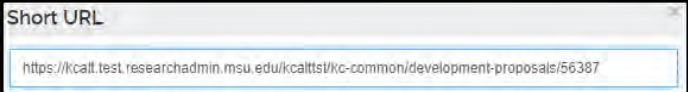
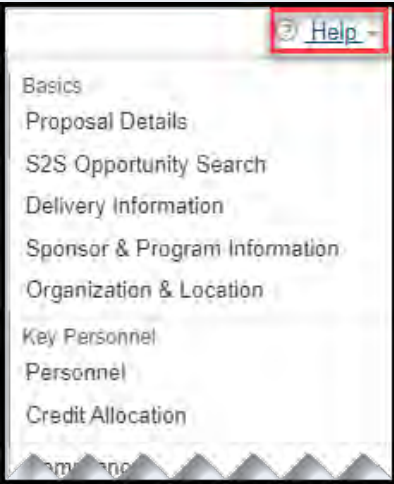
# Layout of Proposal Development

Data Validation (off)
  Print
  Copy
  Medusa
  Hierarchy
  Budget Versions
  Link
  Help

Link Name	Description/Instruction
Medusa	Links different documents throughout a project's lifecycle. 
Hierarchy	This feature is currently not being used.
Budget Versions	Access to the budget versions with the ability to add a new version. 


# Layout of Proposal Development

✓ Data Validation (off) 
  Print 
  Copy 
  Medusa 
  Hierarchy 
  Budget Versions 
  Link 
  Help ▾

Link Name	Description/Instruction
Link	<p>Provides a direct link to the PD document. The link may be copy/pasted and sent to another user. The user must have permissions to access the PD.</p> 
Help	<p>Provides helpful articles and resources from Kuali Research. The Help links will direct users to the Kuali website, and are not specific to MSU business processes.</p> 

# Layout of Proposal Development

✓ Data Validation (off)
  Print
  Copy
  Medusa
  Hierarchy
  Budget Versions
  Link
  Help

Once routed a new link will appear:  Update Disclosure

Link Name	Description/Instruction
Update Disclosure	Provides a direct link to an Investigator's Project Based COI disclosure.

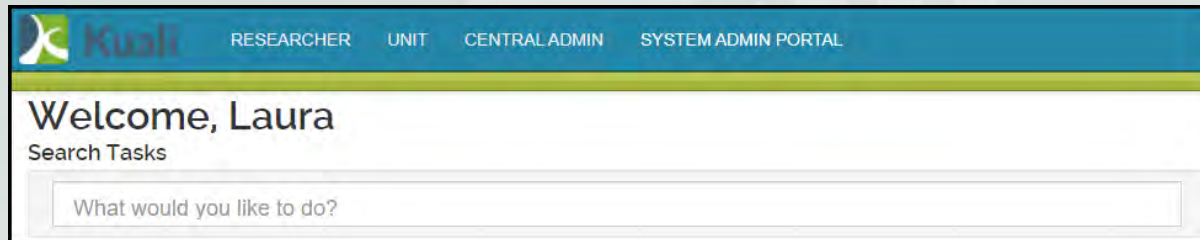


# Proposal Search

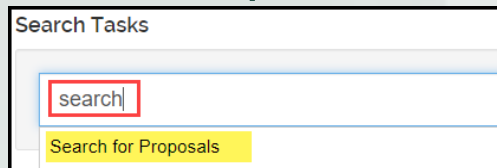


# Searching for PDs

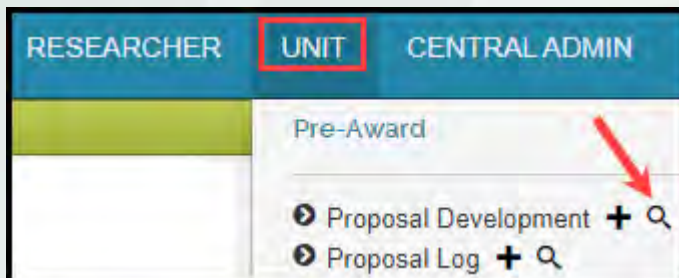
The Kualu Research landing page is a welcome screen with a Search Tasks bar.




- To search for a PD, start typing the word “search” in the task bar and options will appear. Select **Search for Proposals**.



- You can also search for PDs through the Researcher and Unit links.



 = Search



# Copy a Proposal

# Reasons you may choose to copy a proposal

- Create a template proposal
- Change the lead unit
  - Only permitted when individual is appointed in or has permission to create proposals in multiple units
- Calculate a revised budget at the JIT phase
- Prepare an Award Revision
- Submit a proposal that is similar to one already submitted

# Copying the Proposal

- Creates a new proposal development document, copying the data from the original proposal

This proposal copy will include a linked Grants Gov opportunity. Use the 'Remove Opportunity' option in the S2S page of the copied proposal to remove an invalid/expired opportunity

Original Lead Unit  
10059973 - SPA OSP PREAWARD

Lead Unit: \*  
select

Budget?  
 Yes: Include budget(s)

Budget Version  
All Versions

Attachments?  
 Yes: Include attachments

Questionnaires?  
 Yes: Include questionnaires

Deadline Type: \*

Deadline Date:  
mm/dd/yyyy

Copy Close

- Copy options

- Include the Sponsor Deadline Type and Date if required
- Include the budget; final version or all versions
- Include the attachments
- Change the lead unit (if you have proper permissions)
- Include responses to the proposal questionnaires

# Things to check in a copied proposal

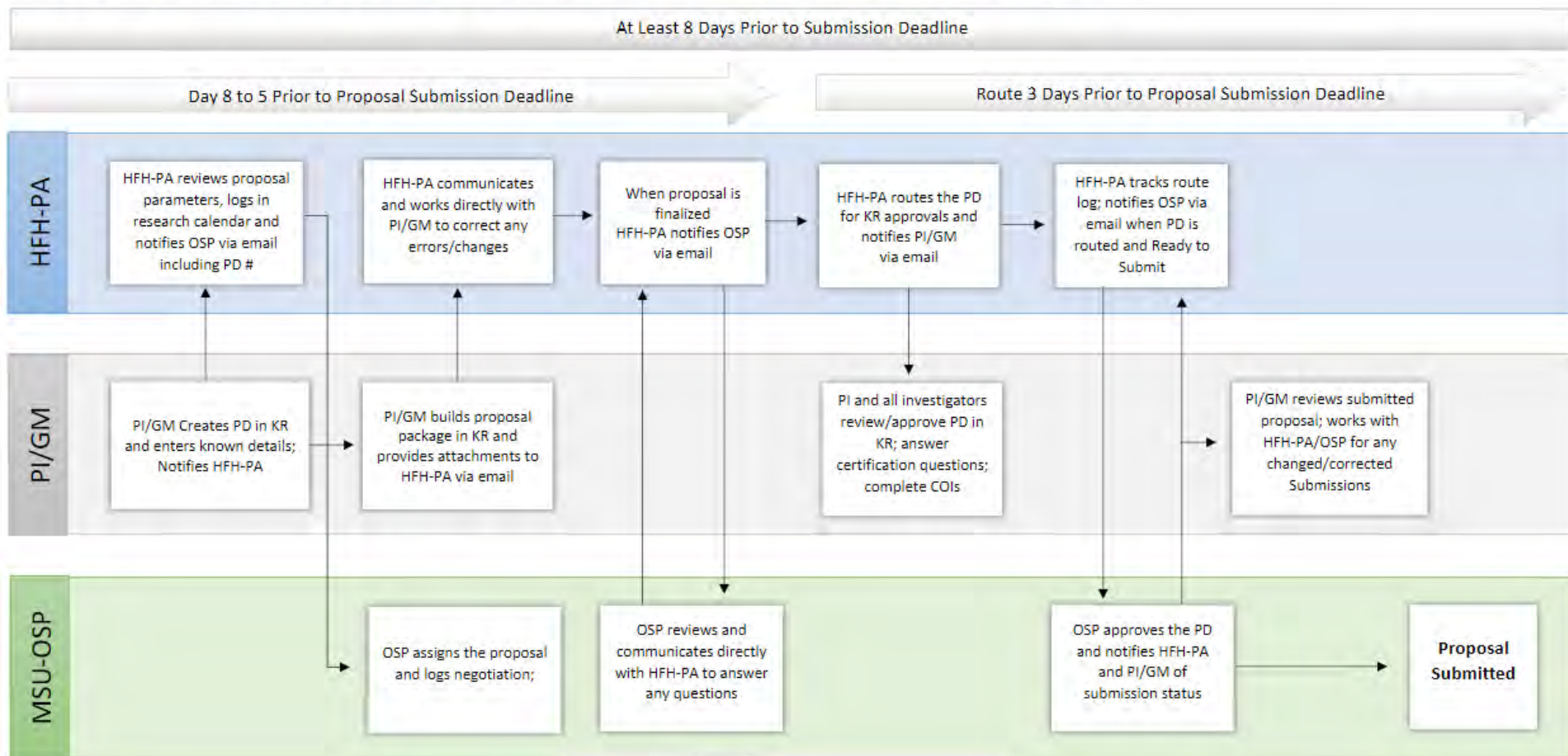
- **Grants.gov Opportunity and Forms** – both the opportunity and form selections (including User Attached Forms) are copied to the newly created proposal
- **Permissions** - original proposals permissions are copied to the newly created proposal
- **Questions** - responses to questions are copied to the newly created proposal, when selected
  - Responses to Investigator Certification Questions do not copy
- **Attachments** – all proposal, personnel, and internal attachments are copied to the newly created proposal, when selected
  - Status changes to Incomplete in copied proposal

# For more information

- Additional educational/support materials are available at:  
<https://osp.msu.edu/PL/Portal/787/KualiResearchKRTraining>
- KR Support - (517) 355-2000 or [KRHelpDesk@msu.edu](mailto:KRHelpDesk@msu.edu)

# HENRY FORD HEALTH

## RESEARCH ADMINISTRATION | PRE-AWARD | NIH PROPOSAL WORKFLOW





# Questions???

Thank you for your attendance and participation!