Kuali Proposal Development Module

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

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General Instructions

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

b) This document provides instructions for preparing and submitting the **first routing packet** in Kuali for a new project or a ***legacy project*** *(those for which one or more routing packets have been submitted using the previous system (yellow routing sheet))*. A separate document provides instructions for submitting **follow-up routing packets** (*i.e.*, all routing packets for a given project after the initial submission in Kuali).

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.

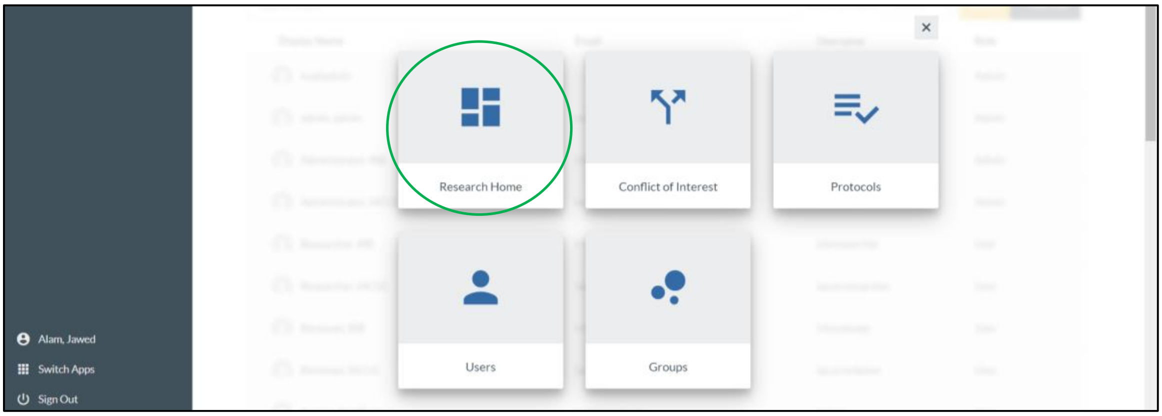
g) Entries into certain fields are made by searching various Kuali databases (people, institutions, sponsors, keywords, etc.) and selecting among the retrieved items. For optimal results, when searching, always bracket your search term by asterisks. For example, if one of the Ochsner campuses is a performance 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.

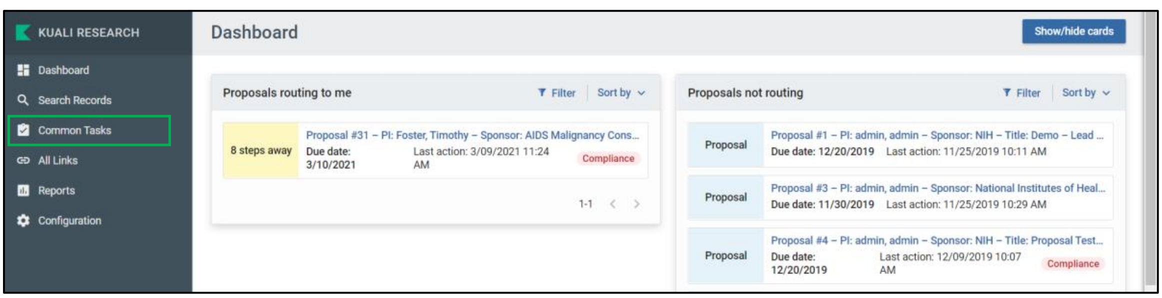
i) If you encounter any problems in creating a proposal, please contact the Office of Grants & Contracts (OGC) at grants-NO@lsuhsc.edu.

Preliminary Steps

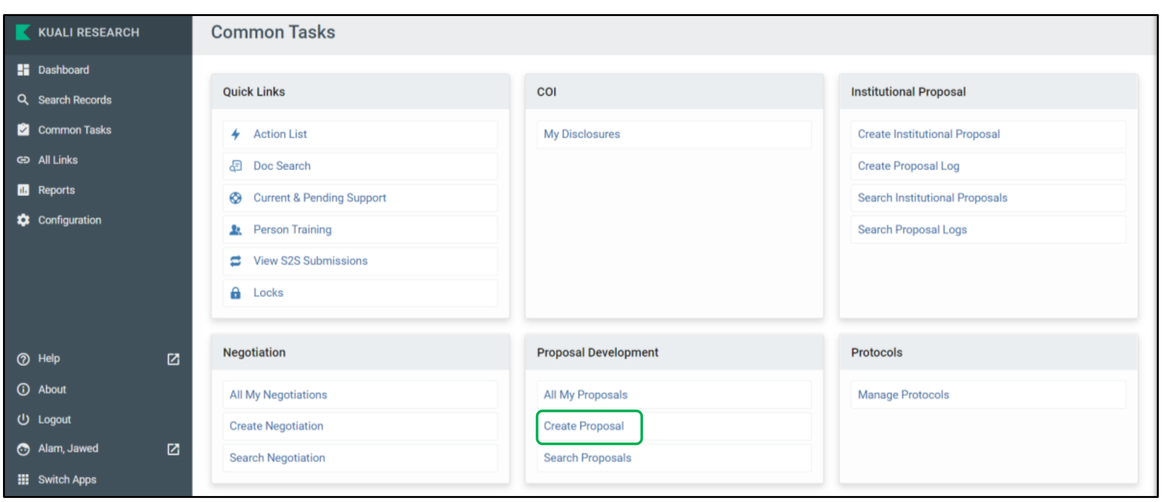
1. Log into Kuali:
   - **LSUHSC Personnel** (individuals with an active @lsuhsc.edu email address): https://lsuhsc.kuali.co/cor/main/#/apps.
   - **Non-LSUHSC Personnel** (individuals without an active @lsuhsc.edu email address): https://lsuhsc.kuali.co/auth/kuali.
2. Click **Research Home.**



3. From your Dashboard click **Common Tasks**.

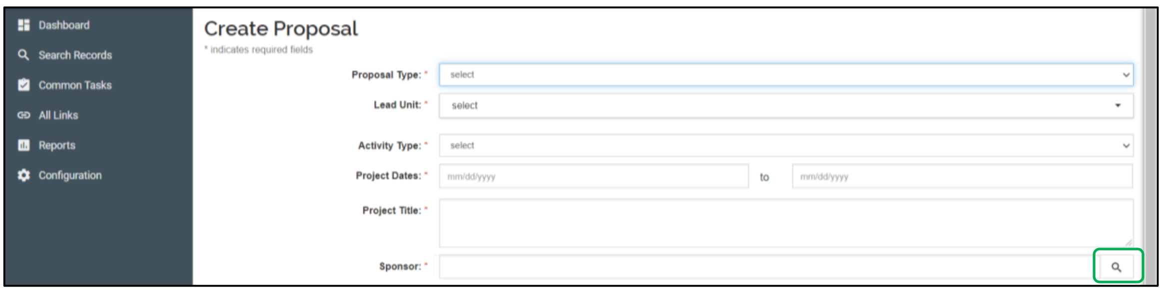


4. On the Common Tasks page, click **Create Proposal**.

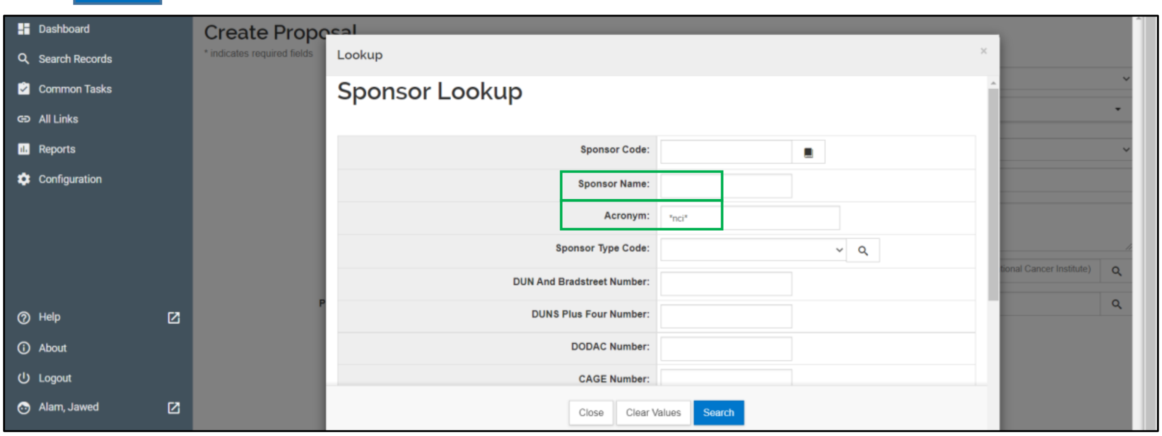


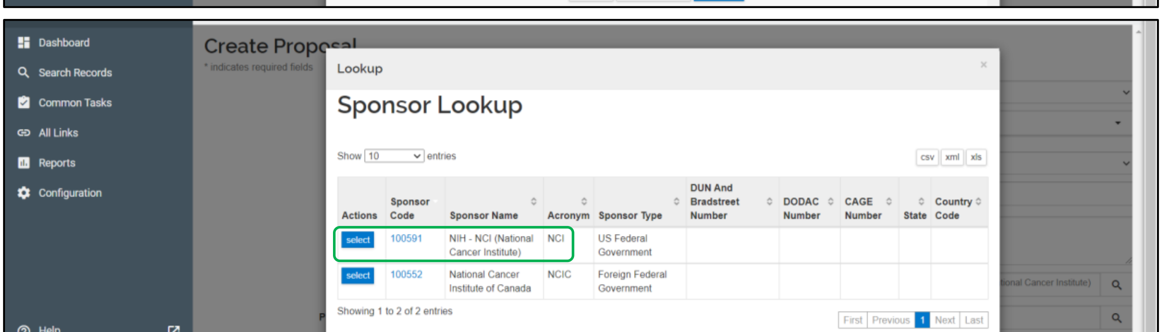
Create Proposal

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***.
   - **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**



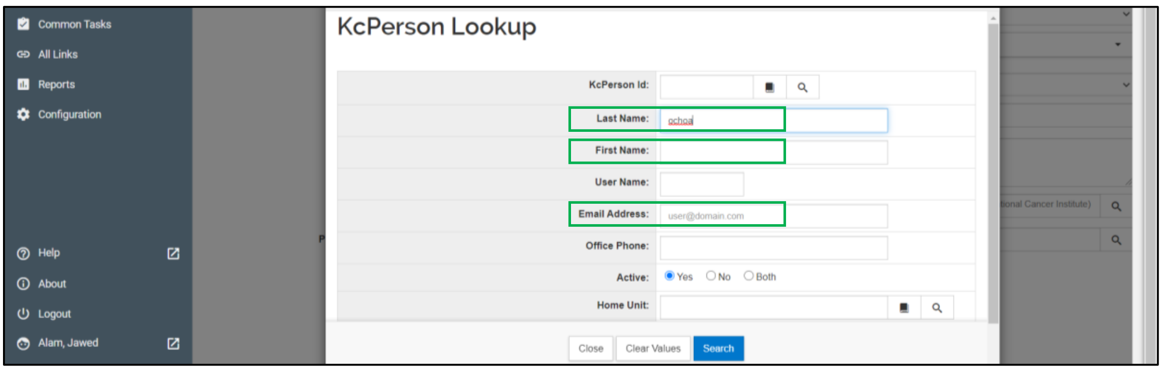
8. On the **Sponsor Lookup** form, enter the ***Sponsor Name*** or ***Acronym*** surrounded by asterisks and then click **Search**.
9. **Select** the correct **sponsor** from the retrieved list.

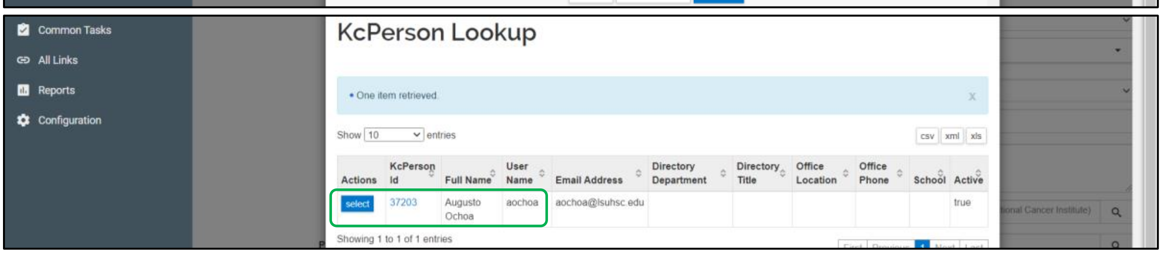




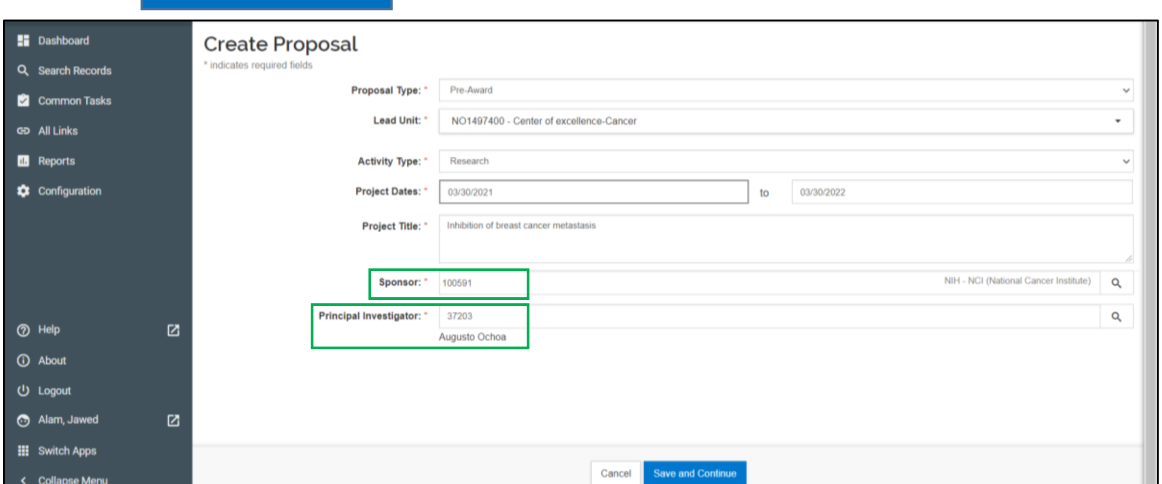
Create Proposal

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 grants-NO@lsuhsc.edu.



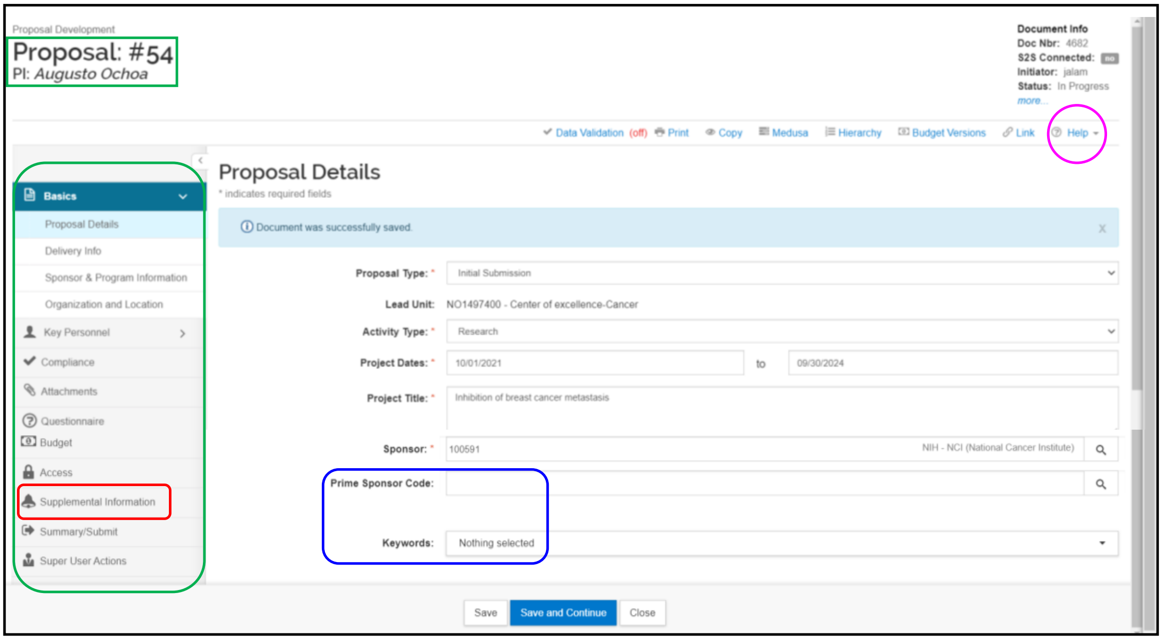


16. The **Sponsor** & **Principal Investigator** fields will be populated with the appropriate **codes** and **names**.
17. Click **Save and Continue**.



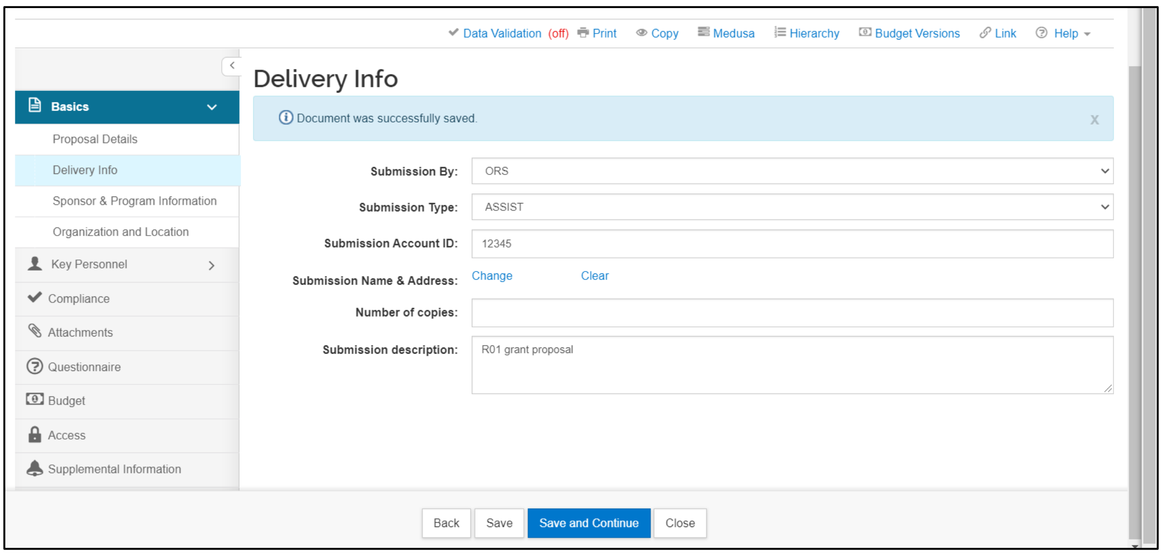
Proposal Details

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 sub-awardee 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**.



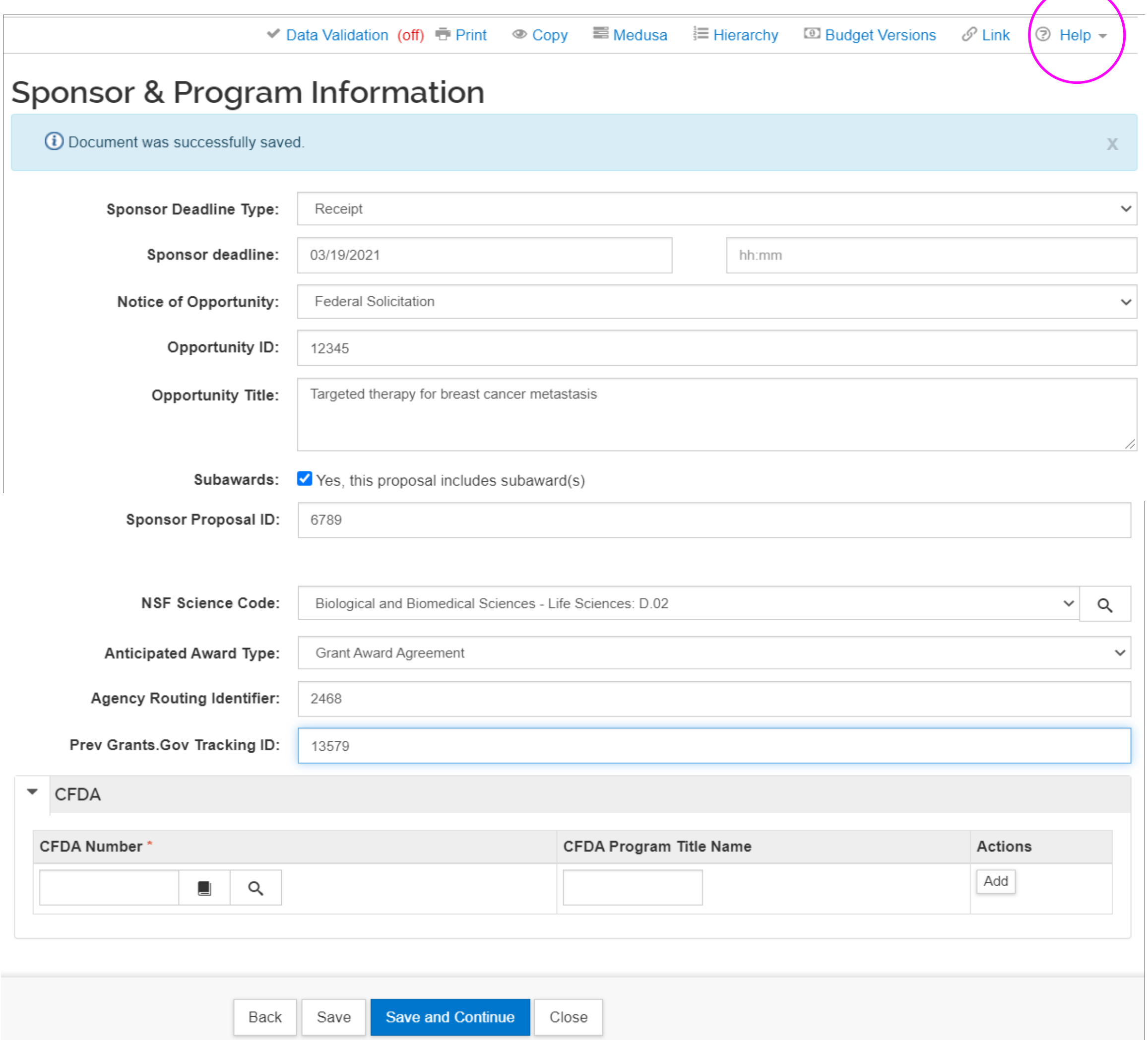
Delivery Info

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**.



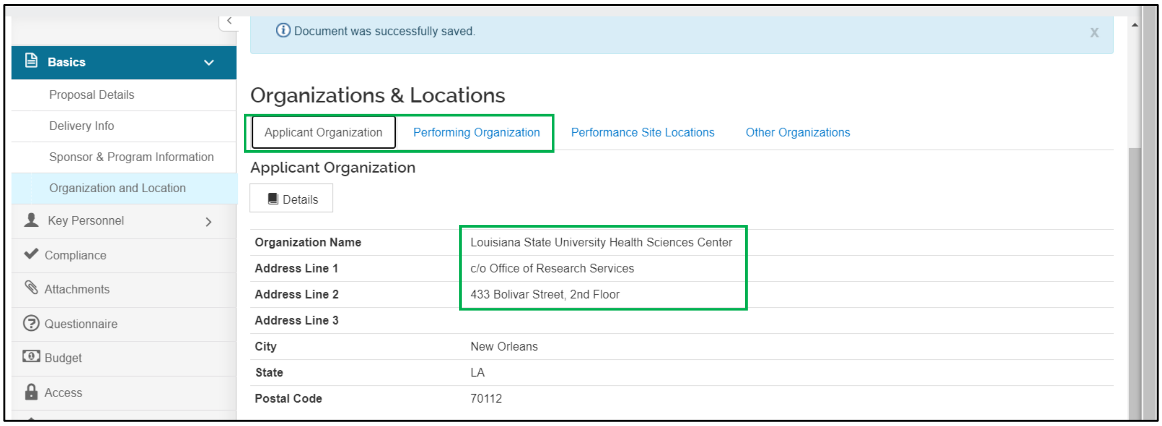
Sponsor & Program Information

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 drop-down. **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**.

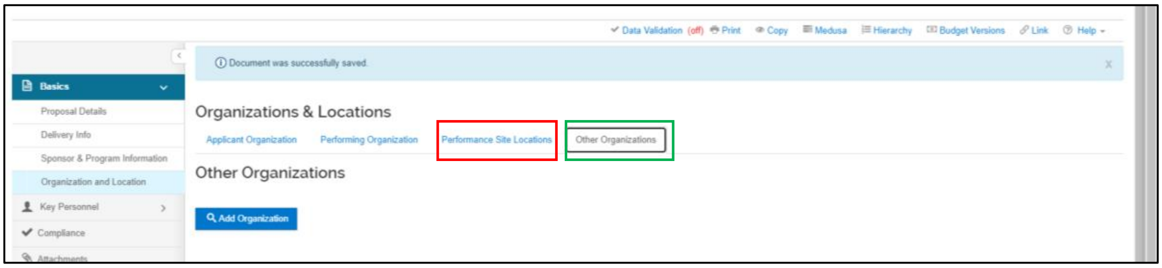


Organization & Location

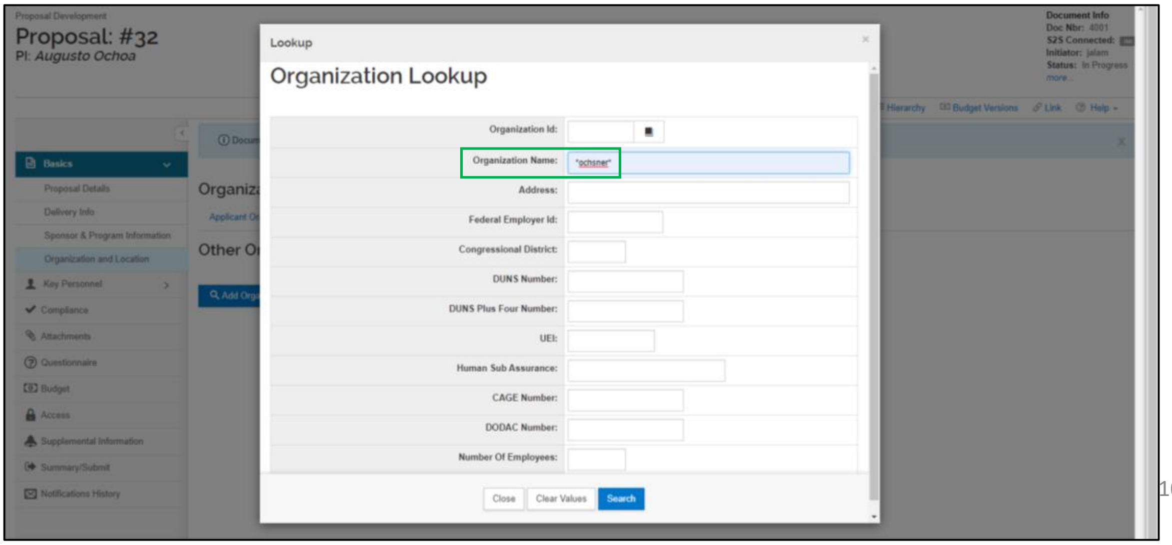
30. In the **Organization & Location** panel, the **Applicant** and **Performing Organization** tabs will default to **LSUHSC**; **DO NOT CHANGE**.



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

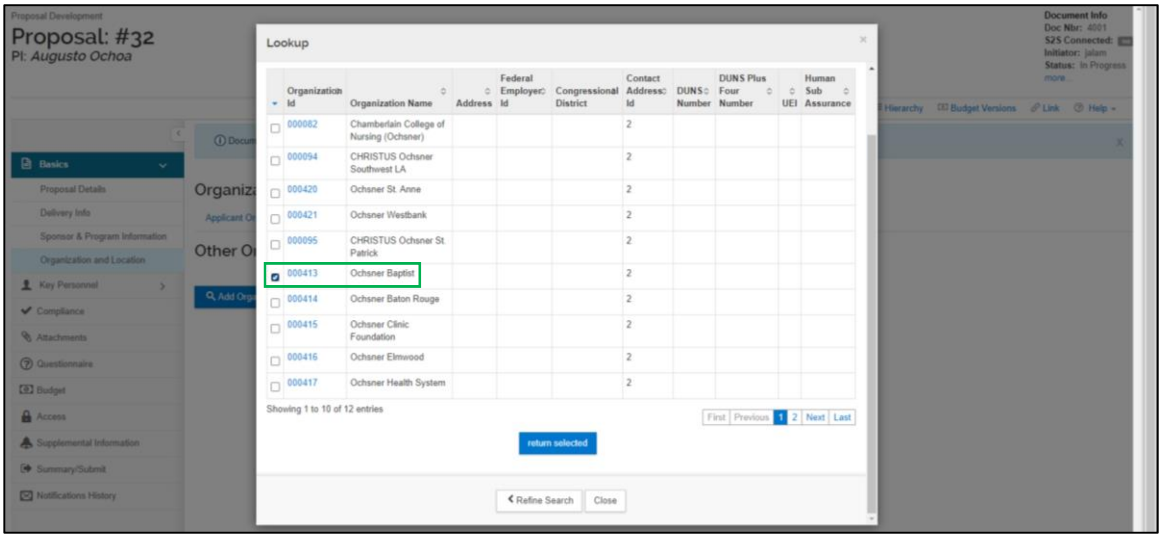


33. In the **Organization Lookup** window, enter a name of the **Organization with asterisks (*e.g.*, *ochsner*)**.
34. Click **Search**.

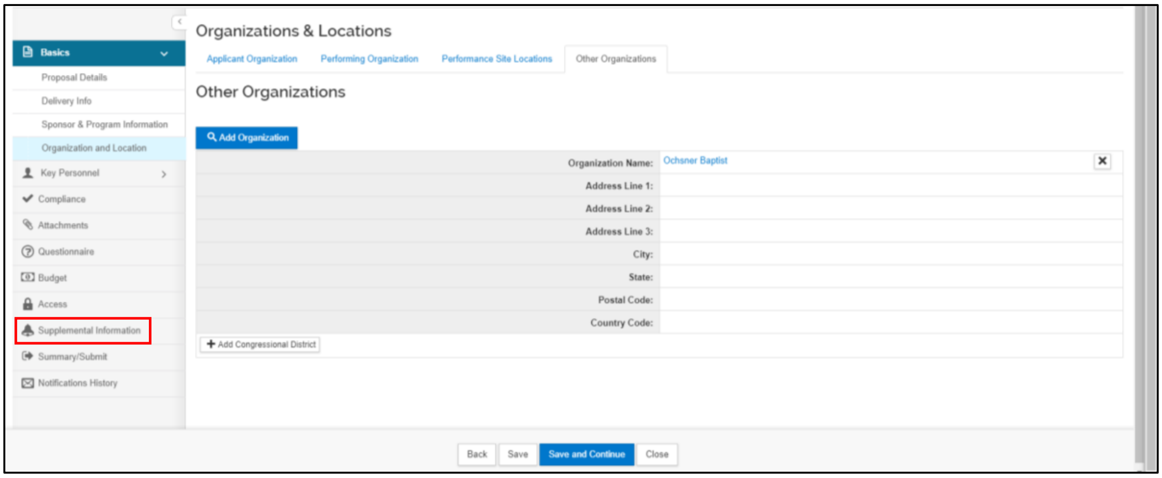


Organizations & Locations

35. Check **the appropriate institution** from the retrieved list.
36. Click **Return Selected**.



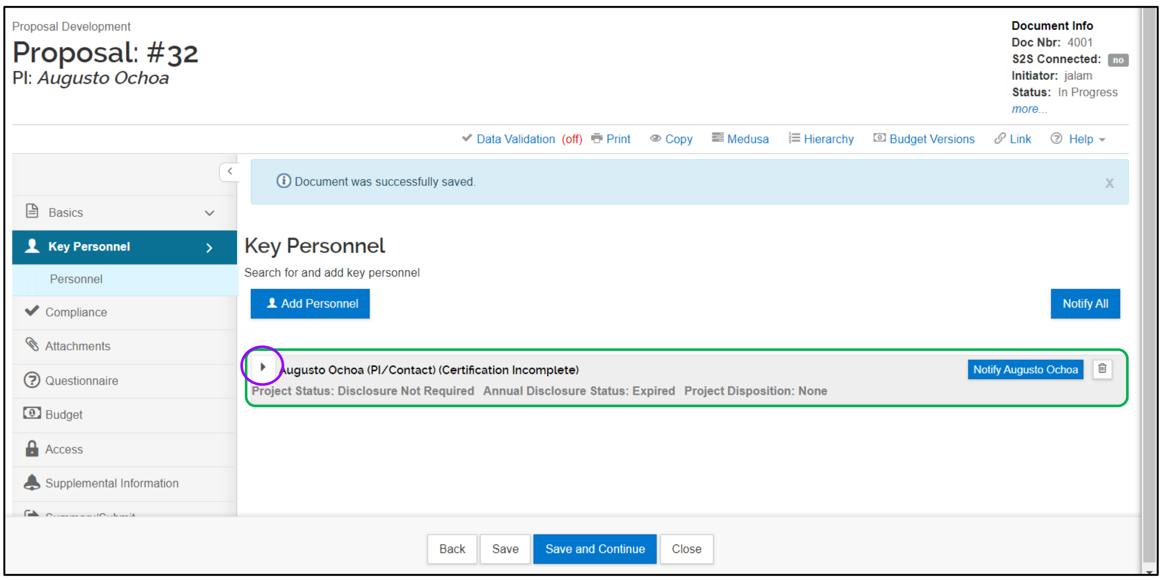
37. The organization will be listed on the **Other Organizations** page.
38. If necessary, click **Add Organization** to enter additional institutions.
39. If no Organization is retrieved, press **Clear Values,** enter ***New*** for the **Name** and click **Search.**
40. **Select "New Organization".** 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.

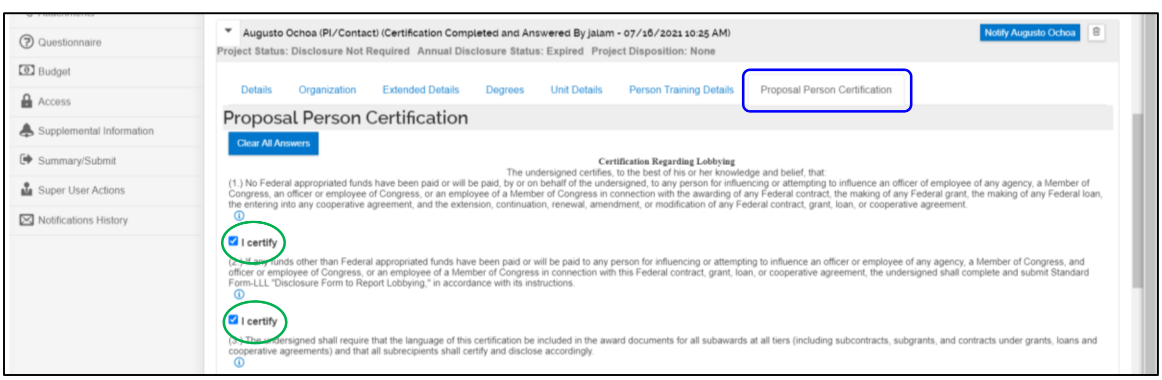


Key Personnel

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**.

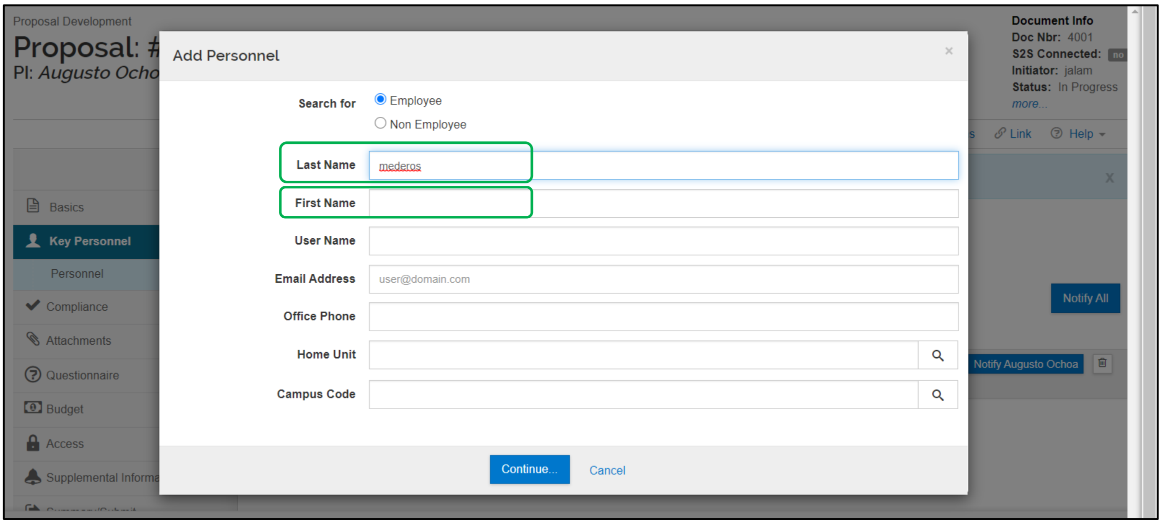
    NOTE: Individuals with a Proposal Creator role (typically Business Managers, Assistant BMs and some Research Coordinators) have system permission to certify on behalf of the PI. When you certify for the PI, an email notification will be sent to the PI informing him/her that the certification has been 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.



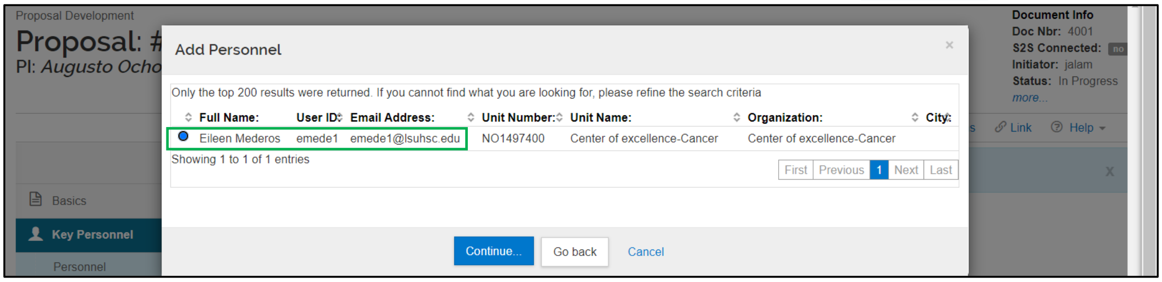


Key Personnel

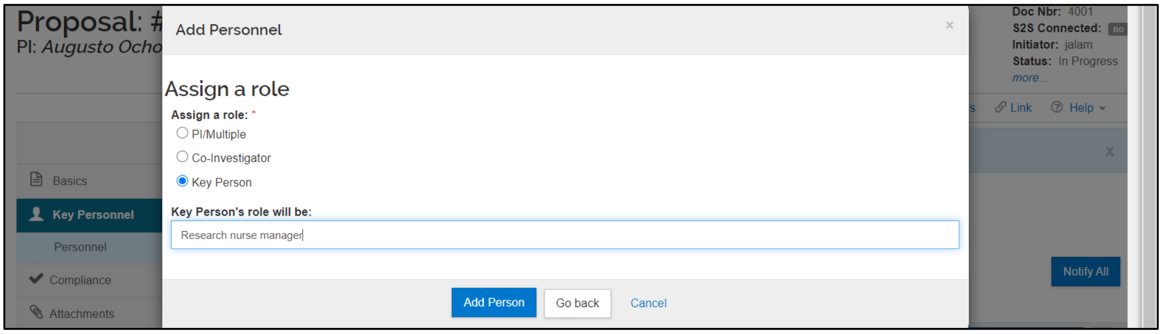
45. On the **Add Personnel** form, select **Employee. Do not search for Non-Employees**. Enter the **last** or **first name** of the individual. Click **Continue**.



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



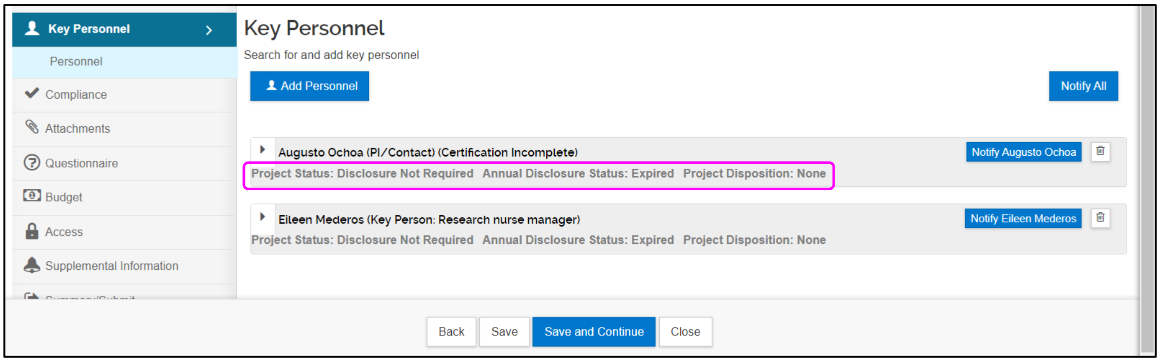
47. Select if the individual is another PI, Co-investigator or a Key Personnel.
48. If Key Personnel, indicate the person's role on the project.
49. Click **Add Person**.



Key Personnel

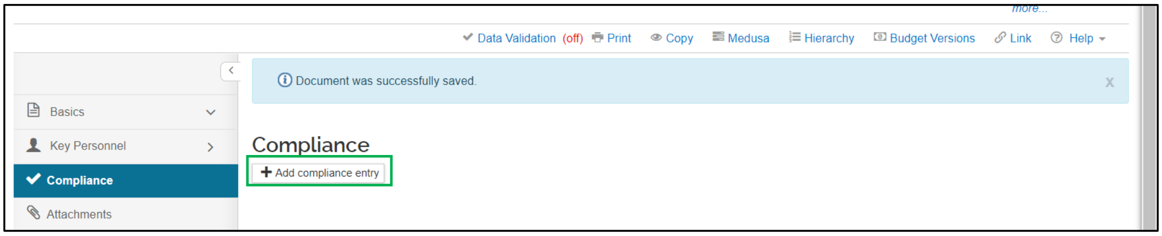
50. The person will be added to the list in the **Key Personnel** section.
51. Repeat the process to add other Key Personnel.
52. **Do not click the Notify button for Key Personnel other than the PI. Only the PI needs to certify the submission**.
53. **If a person is not found during the search contact OGC at** grants-NO@lsuhsc.edu.
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."*

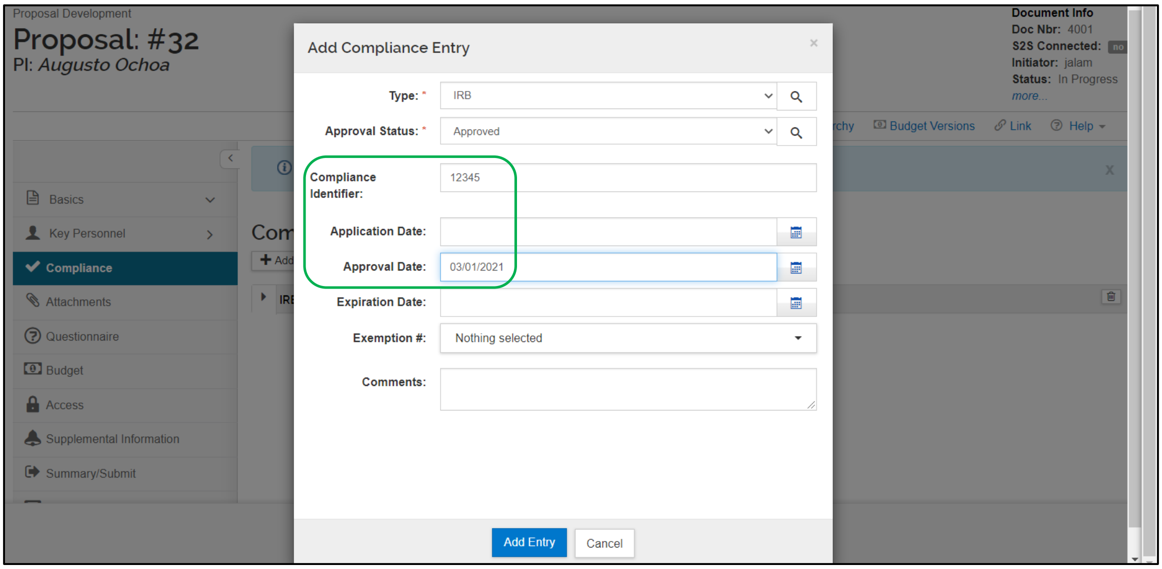


Compliance

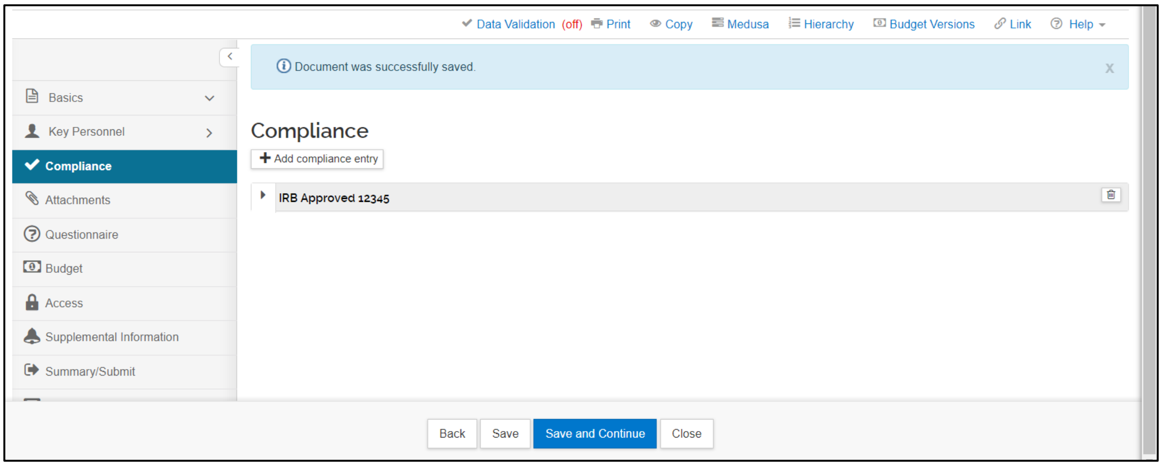
56. In the **Compliance** panel, click **Add Compliance Entry** if the project requires IRB, IACUC, IBC and/or Radiation Safety approval.



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**.

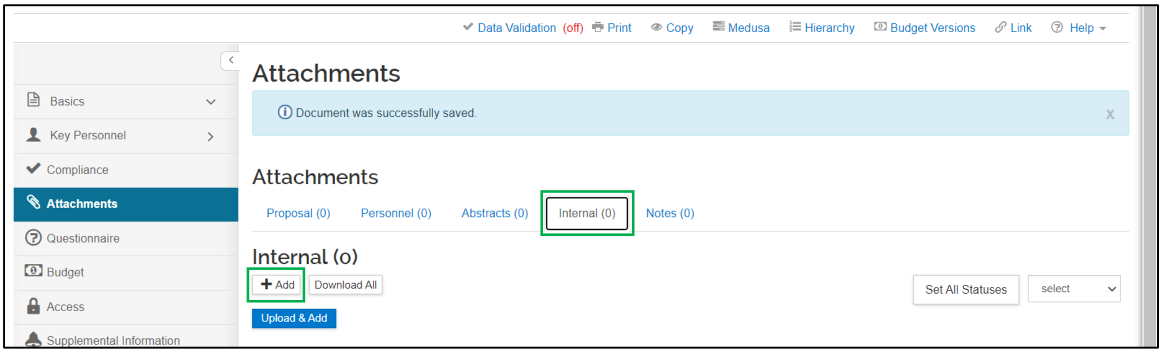


59. Add additional compliance entries as applicable.
60. When finished, click **Save and Continue**.

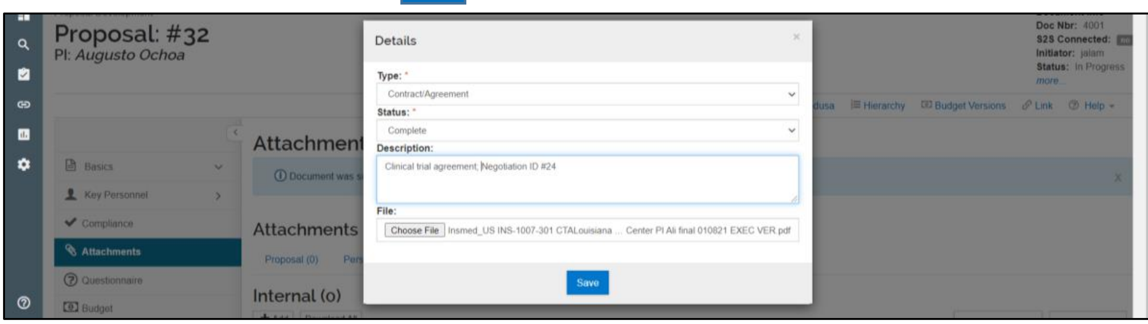


Attachments

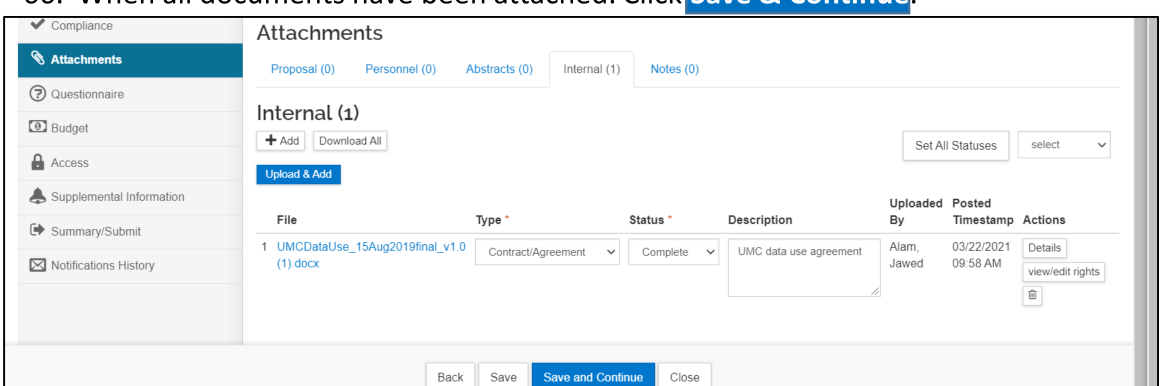
61. In the **Attachments** panel, click the **Internal** tab. **Do not use the other tabs.**
62. Click **+Add** to upload documents individually or click **Upload & Add** to upload multiple documents at the same time.



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**.



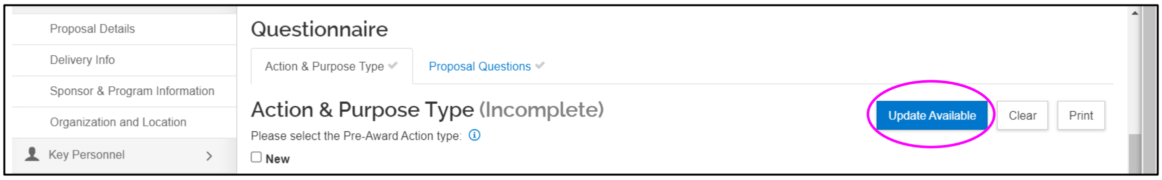
66. When all documents have been attached. Click **Save & Continue**.



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.

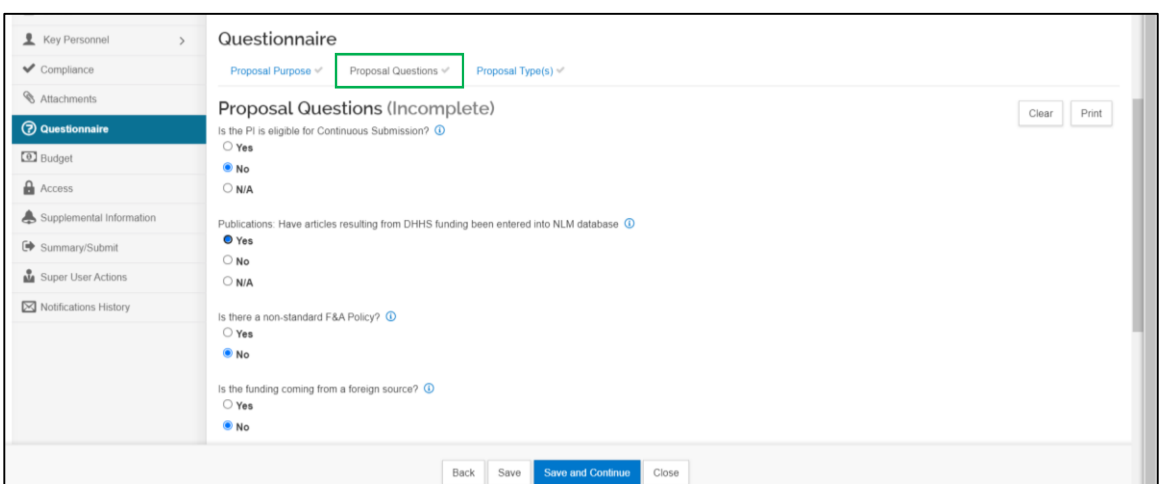
Questionnaire

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



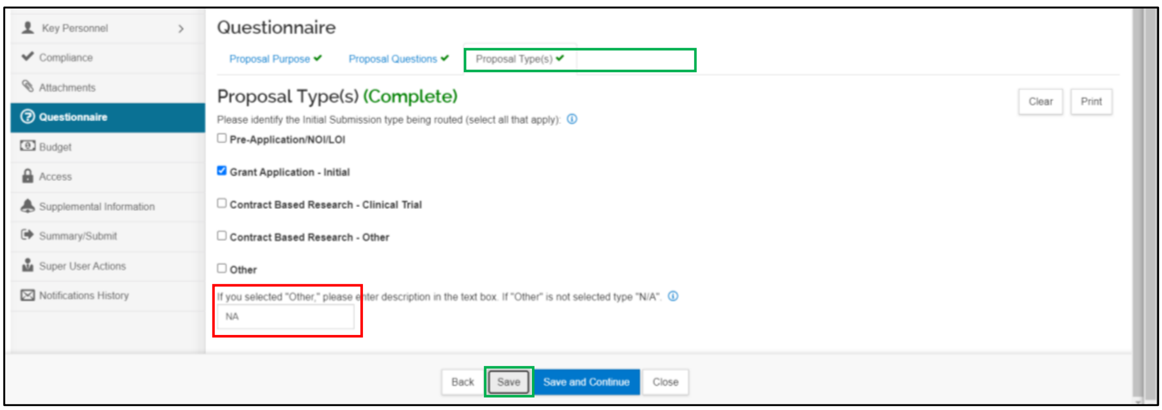
68. Select one or more **Proposal Purpose** types.
   - At least one item must be selected.
   - The text box at the bottom of the page must have an entry; enter "not applicable" if appropriate.

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.



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**.



Budget

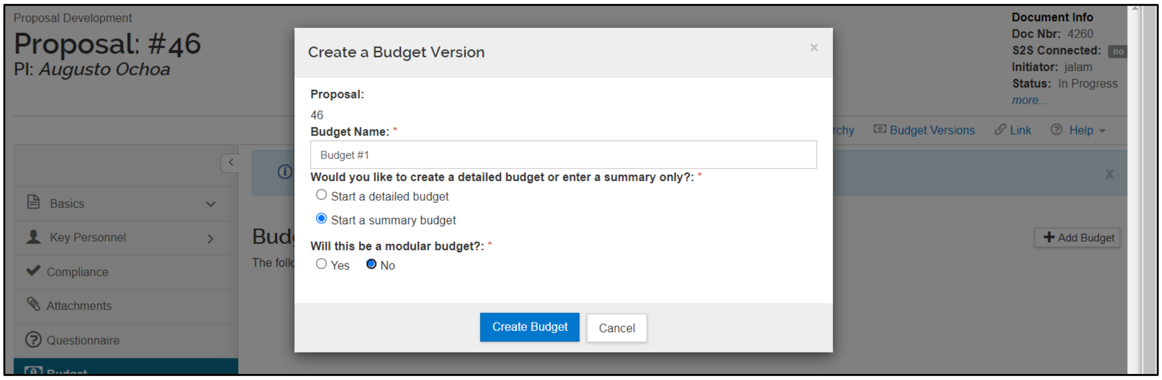
72. General Information

- For **clinical trials**, please complete the Revenue & Expenditure budget 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 Subaward budget 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**.

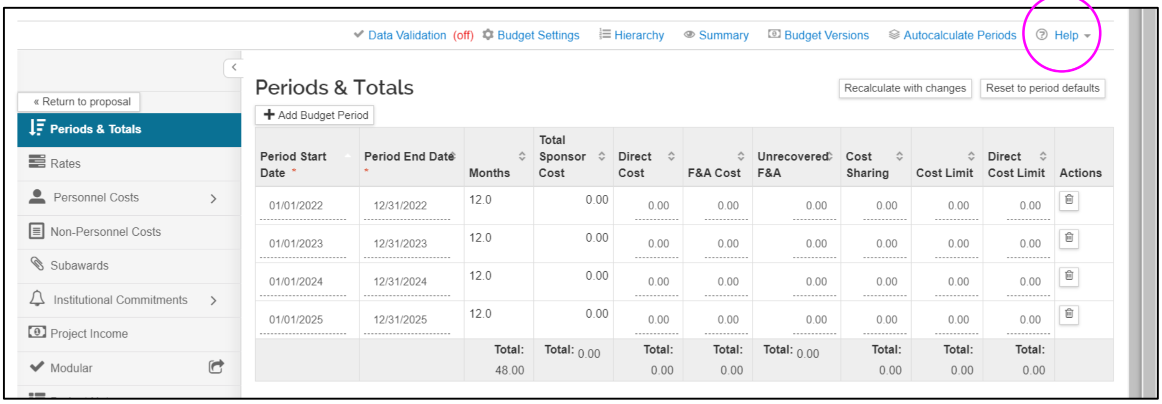
74. In the **Budget Version** window,

- 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**.

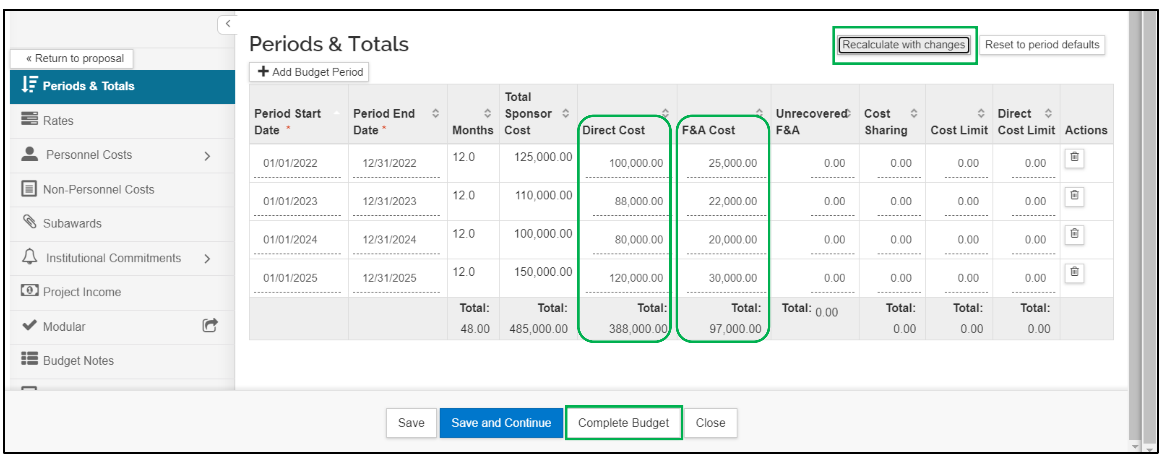


Summary Budget

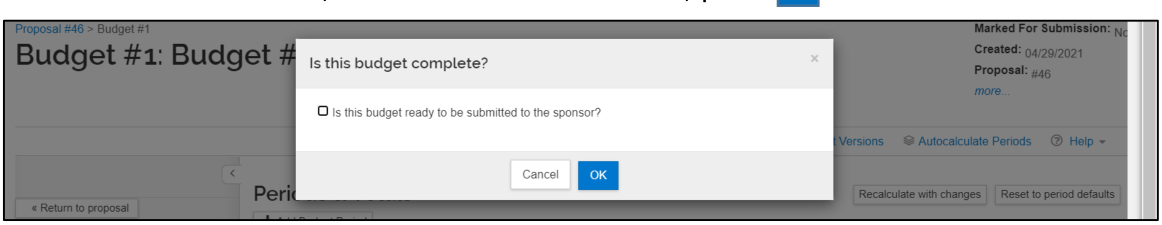
75. You will be directed to the **Periods & Totals** subpanel in the **Budget** panel. Please consult the **Help tab** for more detailed information and instructions regarding each subpanel of the budget.



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**.

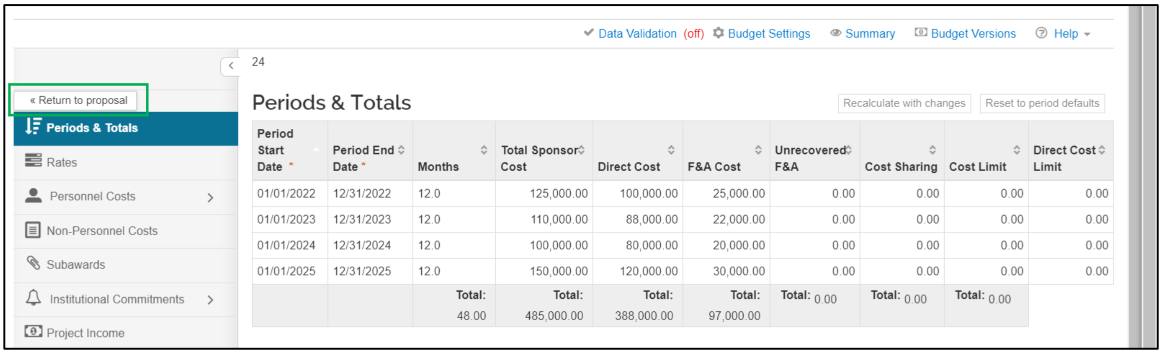


79. In the new window, do not check the checkbox; press **OK**.

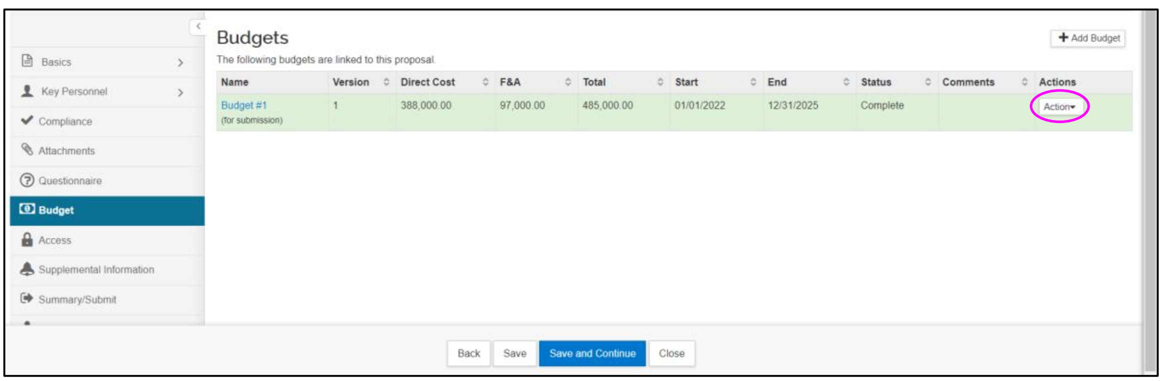


Summary Budget

80. Click **Return to Proposal**.

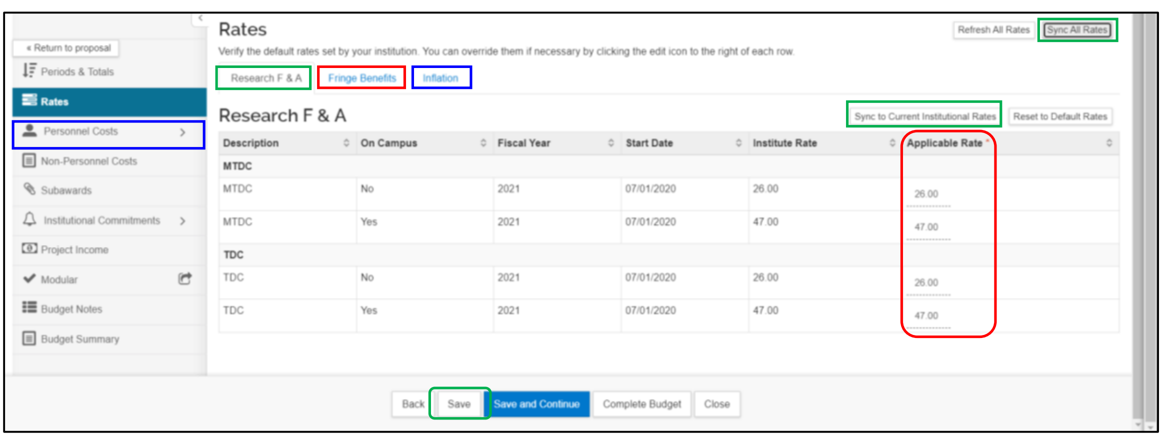


81. You will return to the main Budget panel where the completed budget will be displayed.
82. Click on the **Action** button down arrow and select **Include for Submission**. The budget will then be highlighted in green.
83. Click **Save and Continue**.



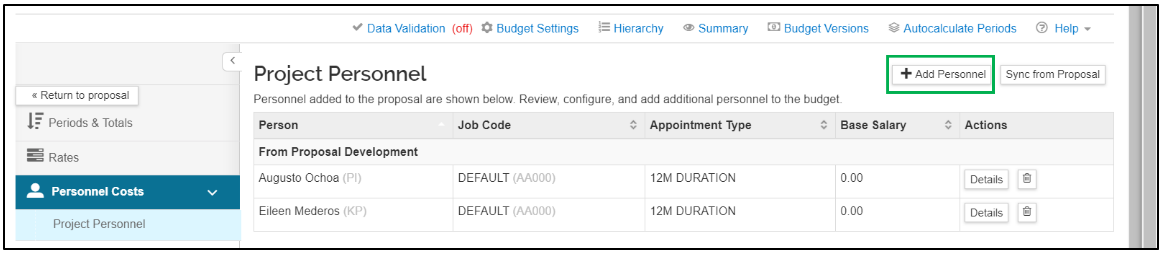
Detailed Budget – Rates

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.

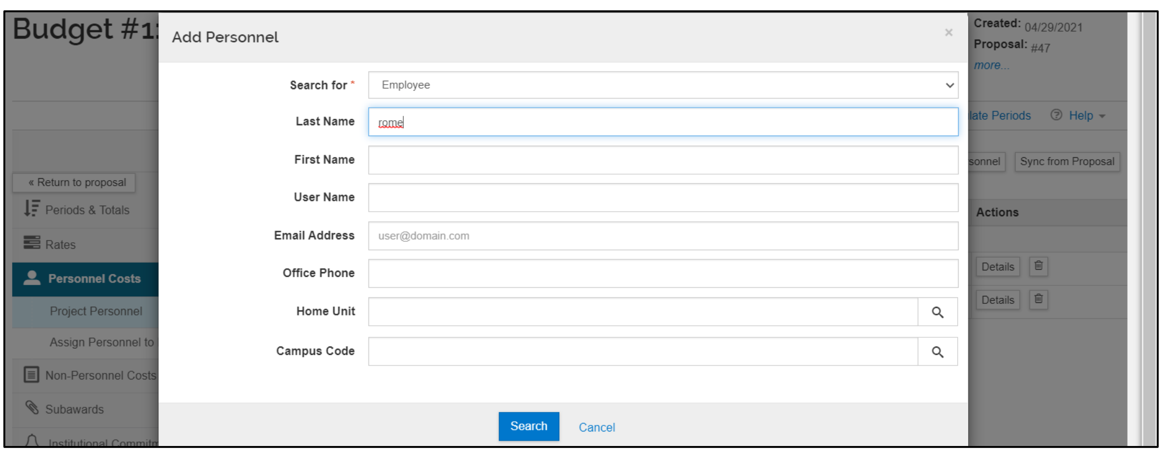


Detailed Budget – Personnel Costs

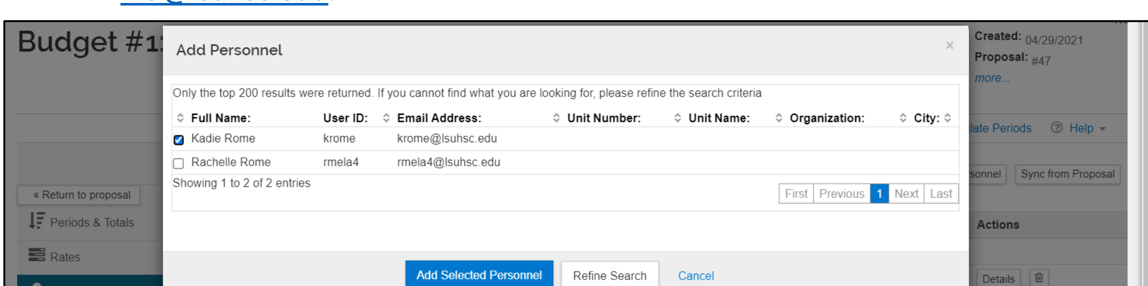
91. In the **Project Personnel** subpanel, Key Personnel entered in the main Proposal module will be populated automatically.
92. If additional personnel (non-Key Personnel) need to be added to the budget, click on the **+Add Personnel** button.



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 **Grants-NO@lsuhsc.edu**.
    - **To be Named:** follow instructions in the window.
94. Enter the individual's **first** or **last name** and click **Search**.

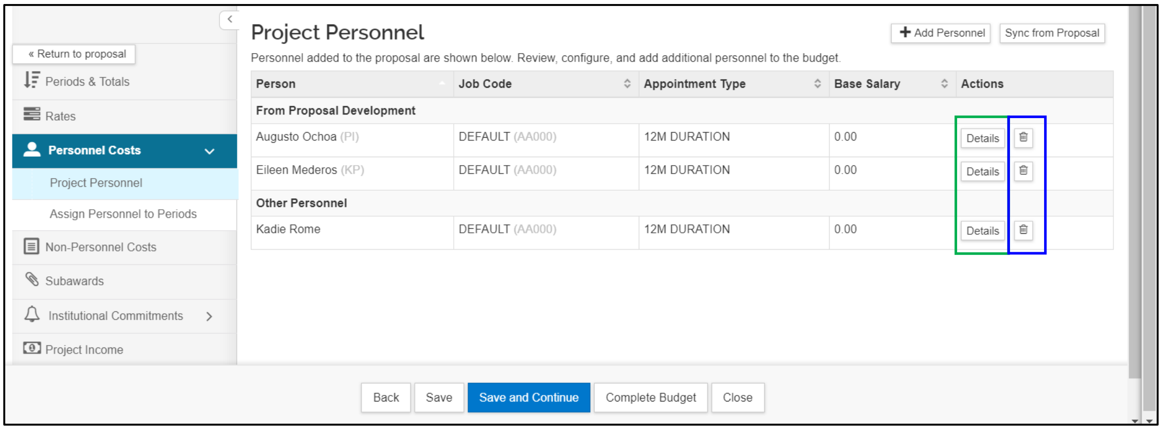


95. From the retrieved list, select the correct individual and click **Add Selected Personnel**.
    - If you are unable to retrieve an employee, contact OGC at Grants-NO@lsuhsc.edu.

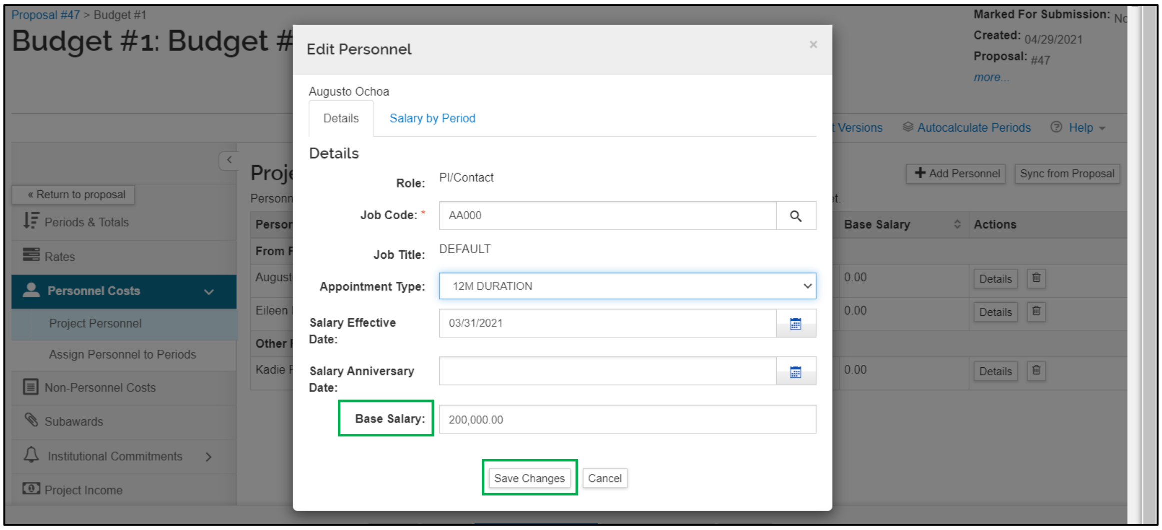


Detailed Budget – Personnel Costs

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

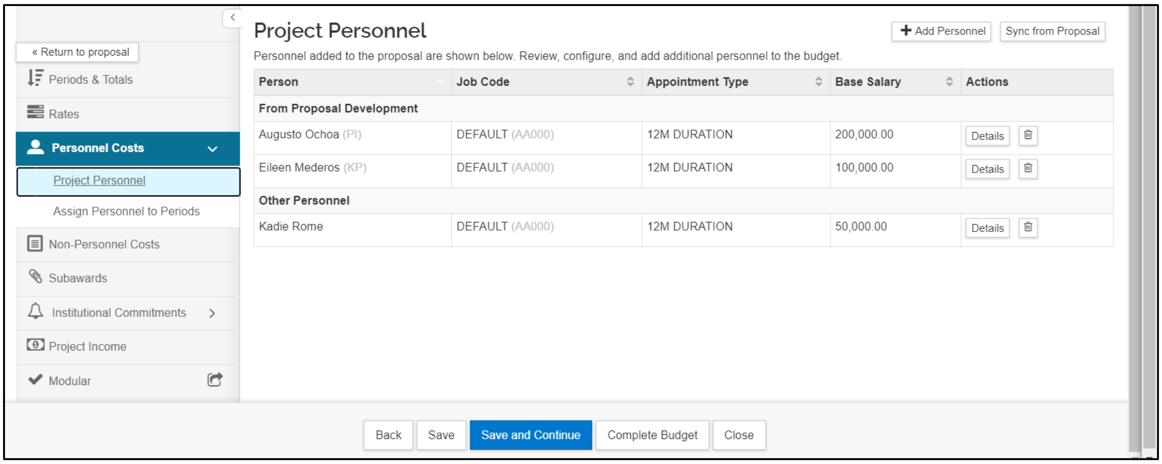


97. In the new window:
    - The **Salary Effective Date** will default to the Project Start date. Do not change unless the person will start working on the project mid-period (for instance, a post-doctoral fellow will not have been hired until several months after the project/award start date).
    - 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.

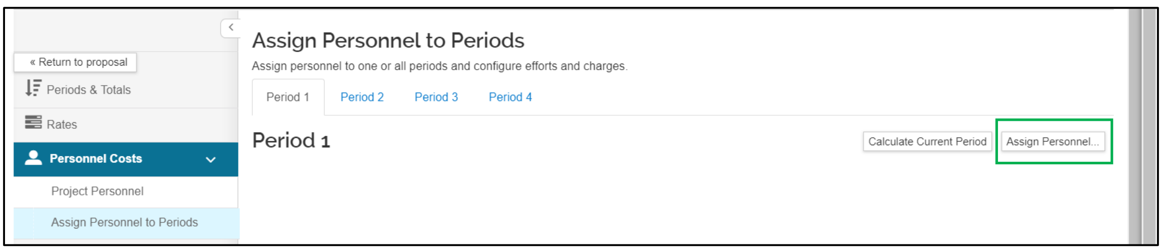


Detailed Budget – Personnel Costs

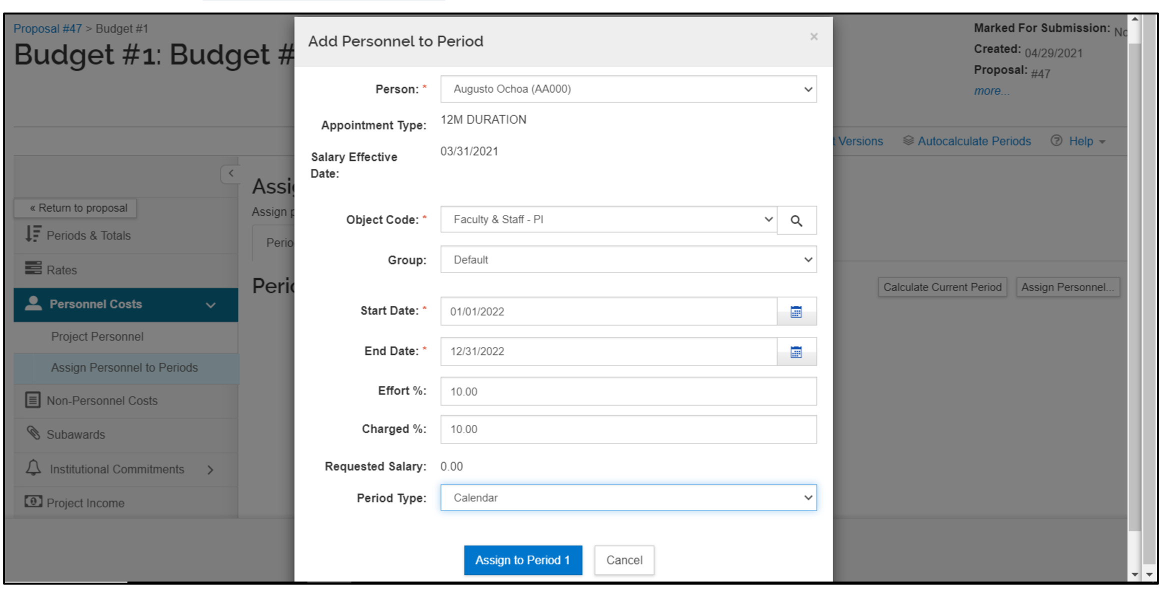
99. When finished press **Save and Continue**.



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



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**.

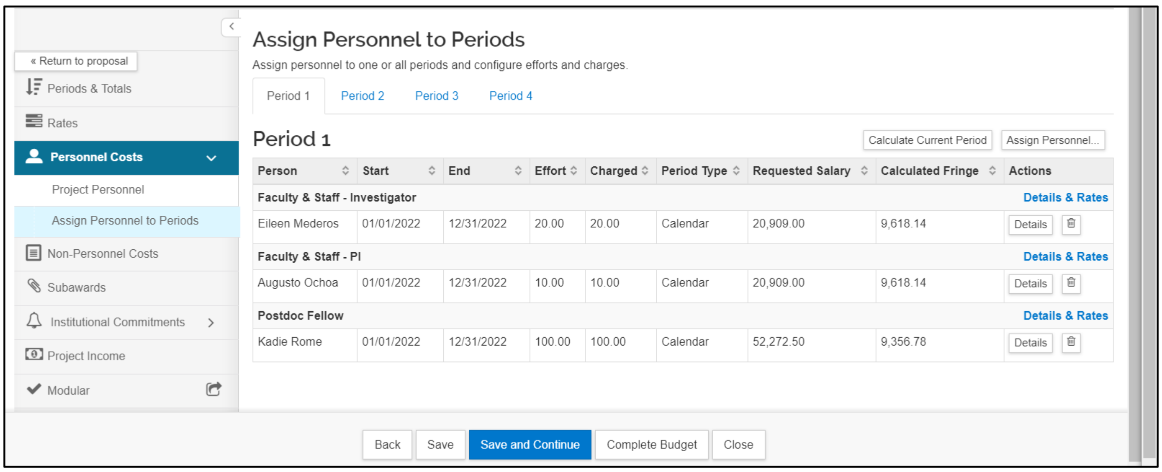


Detailed Budget – Personnel Costs

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.

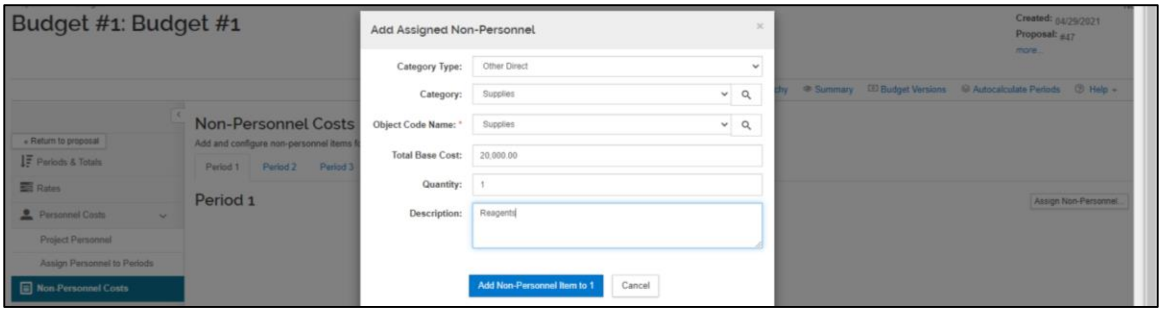
104. Press **Save and Continue**.



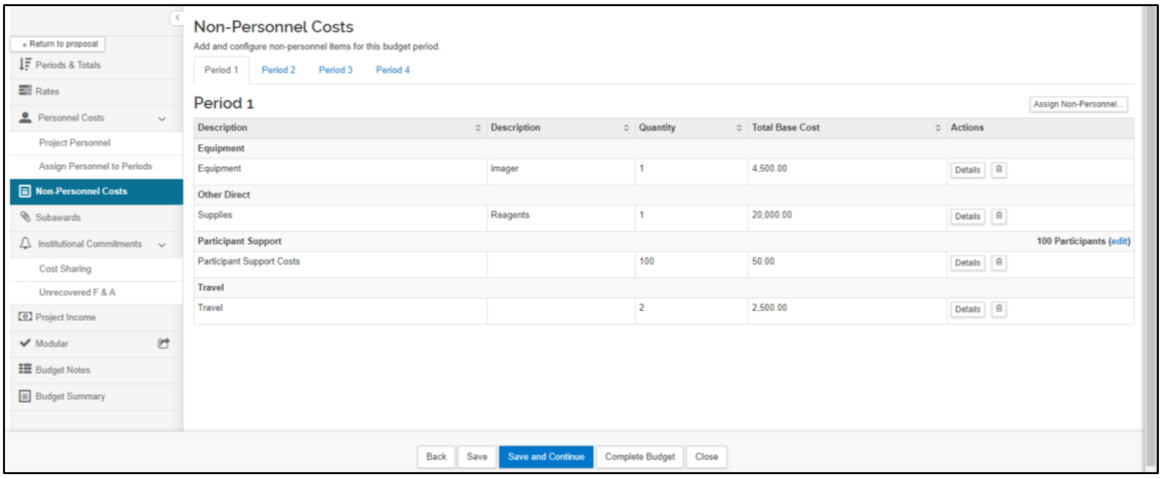
Detailed Budget – Non-Personnel Costs

105. Click **Assign Non-Personnel…** button.

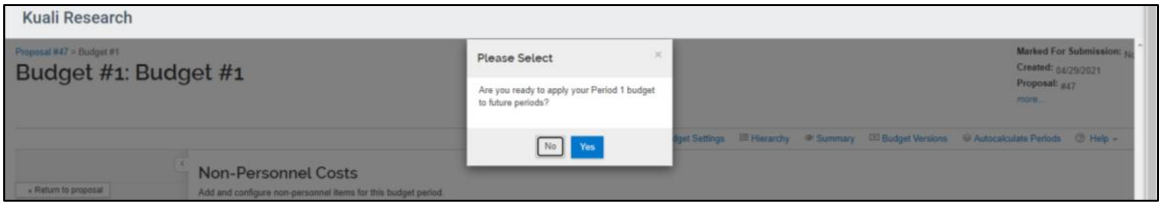
106. Select the non-personnel item and provide the requested information.
107. Press **Add Non-Personnel Item to 1**.



108. Add additional items to Period 1 as necessary.
109. When finished, click **Save and Continue**.



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.

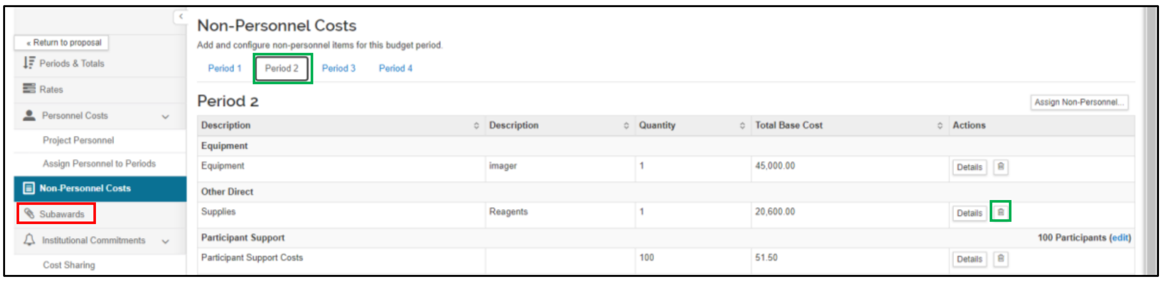


Detailed Budget – Future Period Adjust

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.

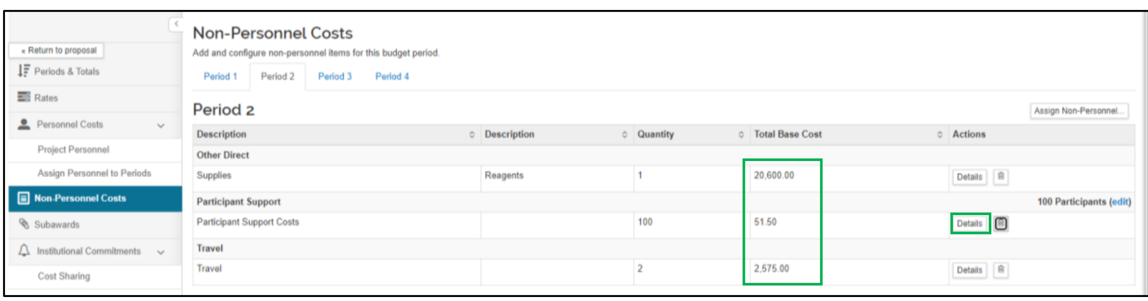
- On the **Non-Personnel Costs** page, click on **Period 2**.
- Click the **Trash Can icon** for **Equipment**.
- Repeat for Periods 3 & 4.



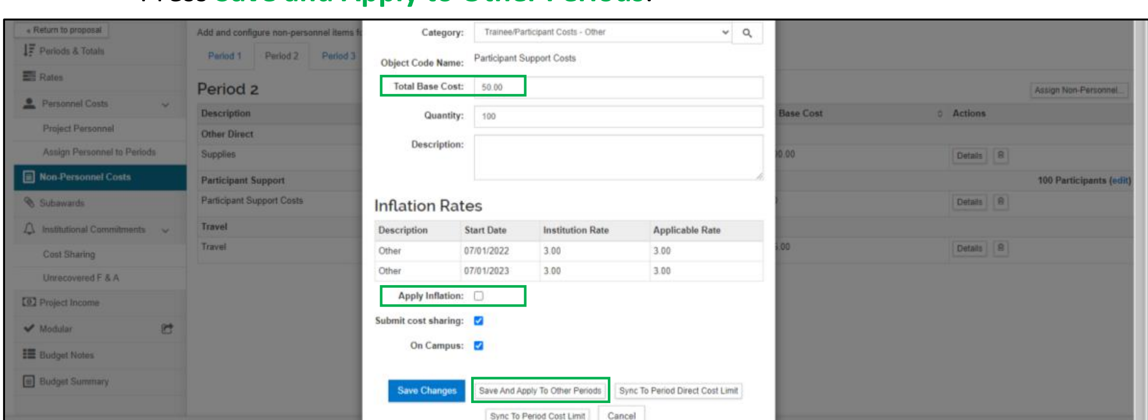
113. In future periods, you will notice that **values for many of the items** have been adjusted by an inflation factor compared to Period 1 values.

114. Adjustment Example 2: Deleting inflation factor from future periods.

- Click the **Details** button for **Participant Support Cost**.

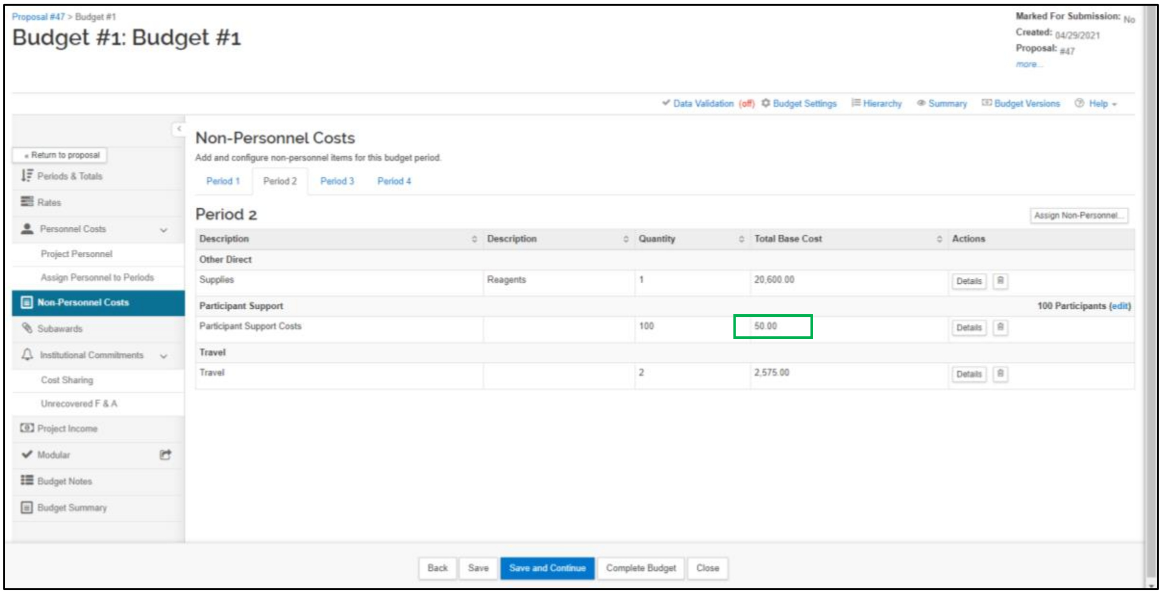


- Adjust the **Total Base Cost** to that in Period 1. Uncheck the **Apply Inflation checkbox**.
- Press **Save and Apply to Other Periods**.



Detailed Budget – Future Period Adjust

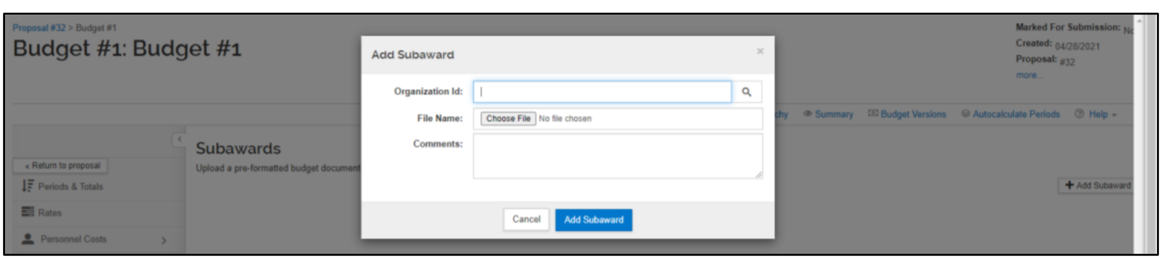
115. The adjusted values will now be displayed in the **Non-Personnel Costs** panel.
116. Similar adjustments to personnel costs also may be made in the **Assign Personnel to Periods** panel.
117. Click **Save and Continue** to advance to the next panel.



Detailed Budget - Subaward

118. If applicable, complete the **Subawards** panel; otherwise navigate to the next panel.
119. In the **Subawards** panel, click **+Add Subaward**.

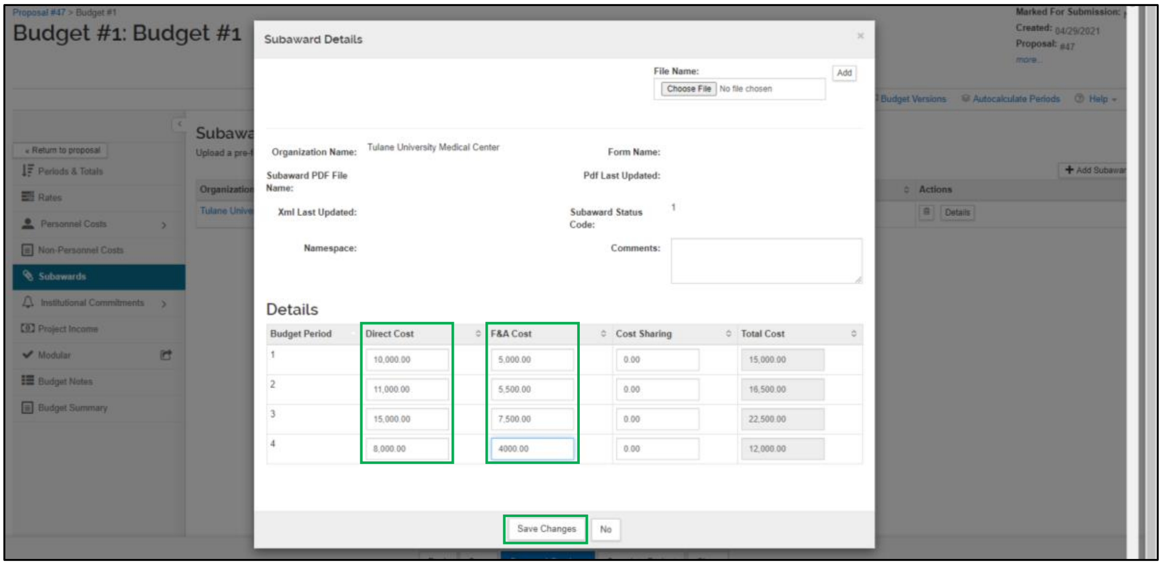
120. In the new window, search for the organization as described in the [Organizations & Locations Panel](#) (pp. 10-11).
121. If no Organization is retrieved, press **Clear Values,** enter ***New*** for the **Name** and click **Search.**
122. **Select "New Organization".** Enter details about the New 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**.



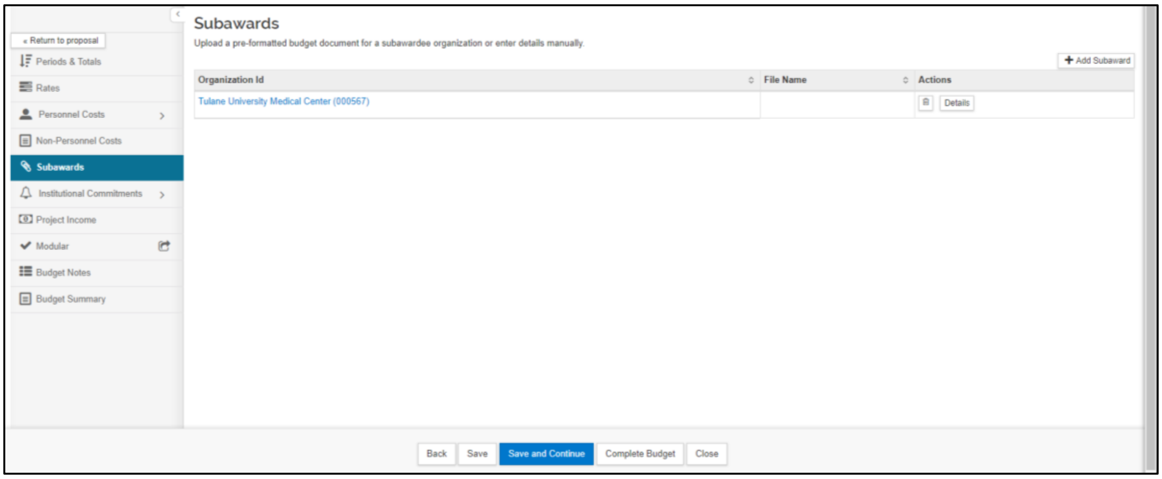
125. Add additional subawardees if applicable. For each subawardee, click the **Details** button.

Detailed Budget - Subaward

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

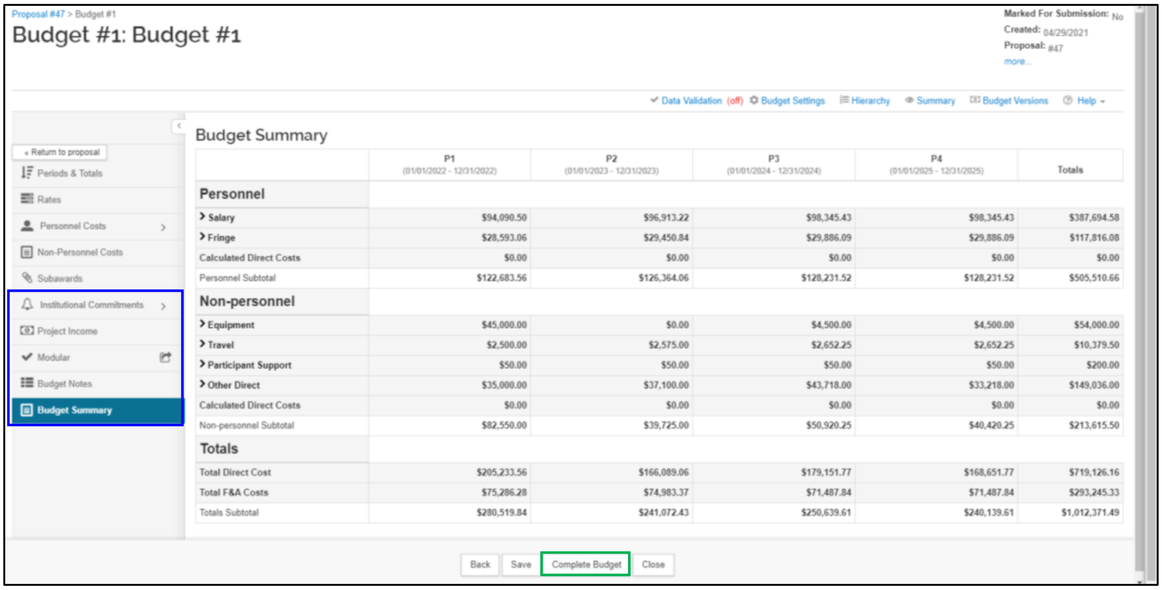


128. When all Subawardees have been updated, press **Save and Continue**.
129. **Do not forget to attach the Subaward budget sheet(s) in the Attachment panel.**

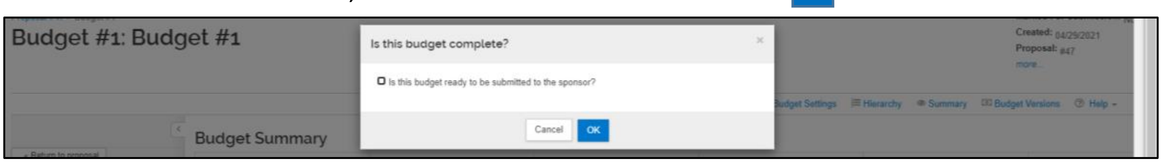


Detailed Budget - Budget Summary

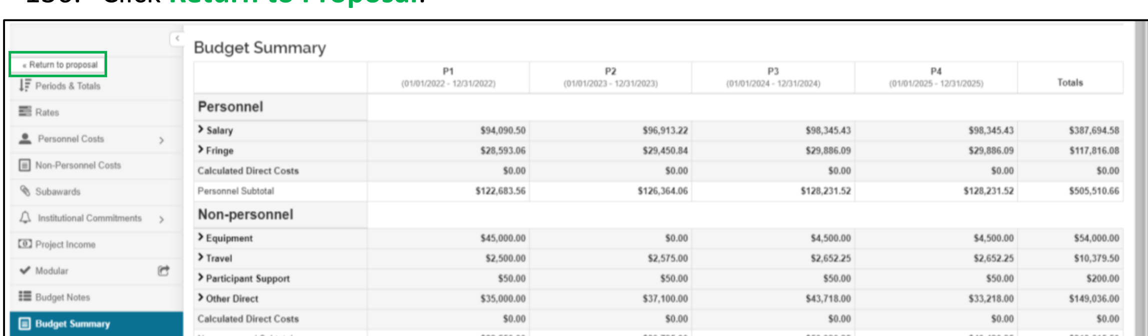
130. No actions are needed in the **Institutional Commitments** or **Modular** panels.
131. If applicable, complete the **Project Income** panel.
132. **Budget Notes:** Anybody working on the proposal budget may add notes in this panel. Use this panel to enter line item budget justifications or upload 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**.



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

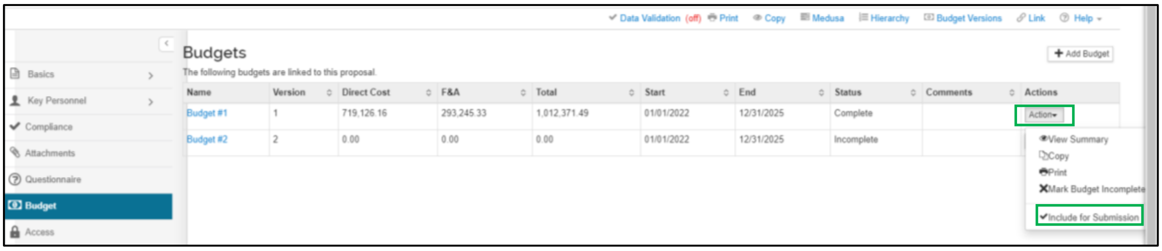


136. Click **Return to Proposal**.

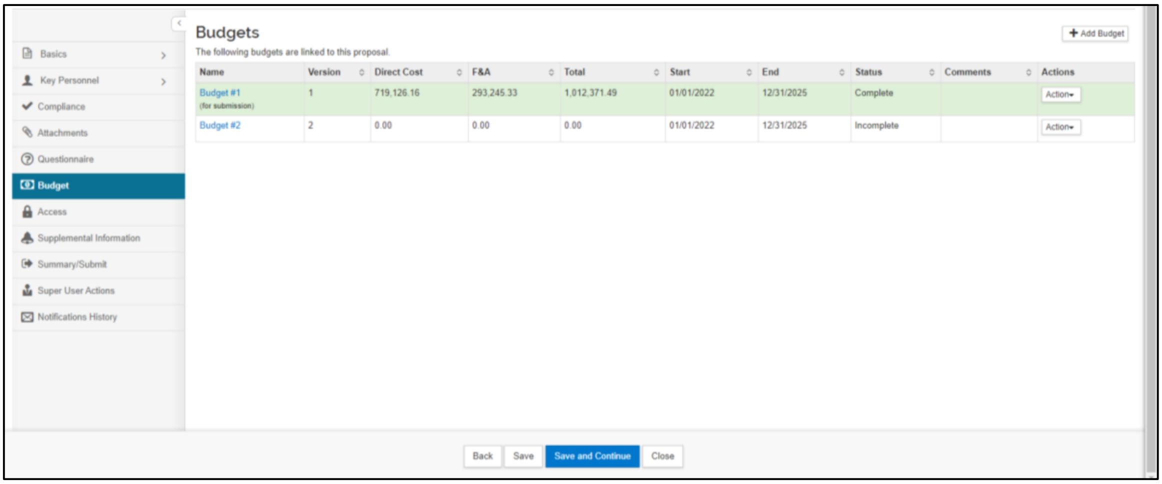


Budget

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.
    - Click on the **Action** button.
    - Select **Include for Submission**.

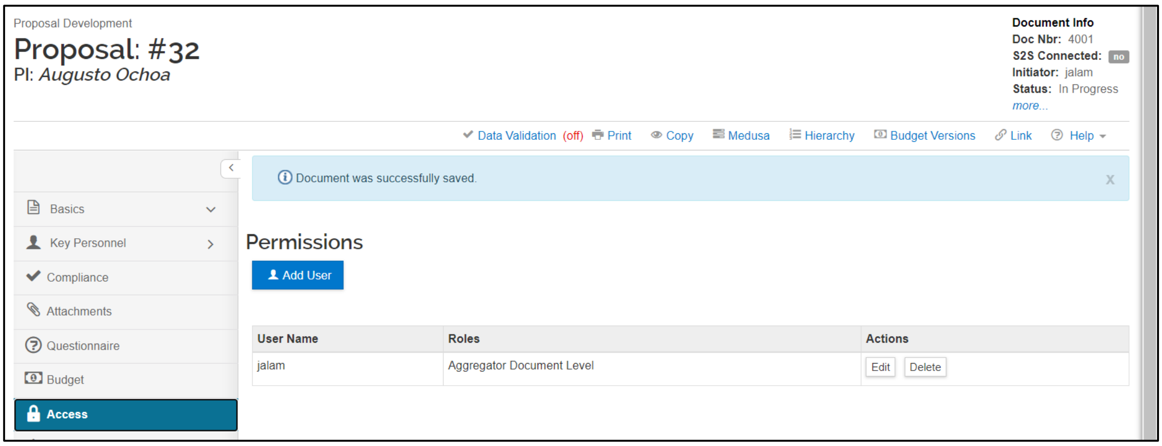


139. The budget that will be submitted will be highlighted in green.
140. Click **Save and Continue**.

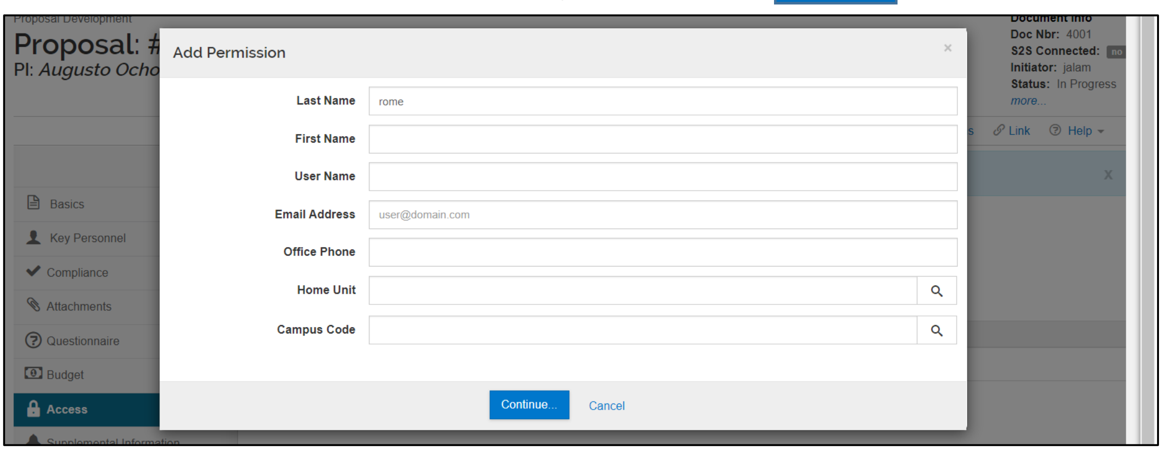


Access

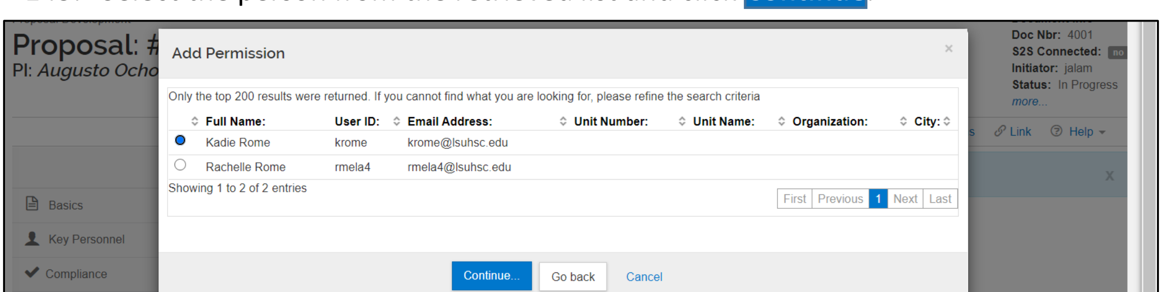
141. The **Access** panel is used to give document specific permission to other individuals. You may add other people who may require view or edit rights during the proposal preparation process.
142. The initiator of a proposal is automatically granted the aggregator role in the Access tab. Do not delete this user.
143. If you wish to give permission to another individual, click **Add User**.



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

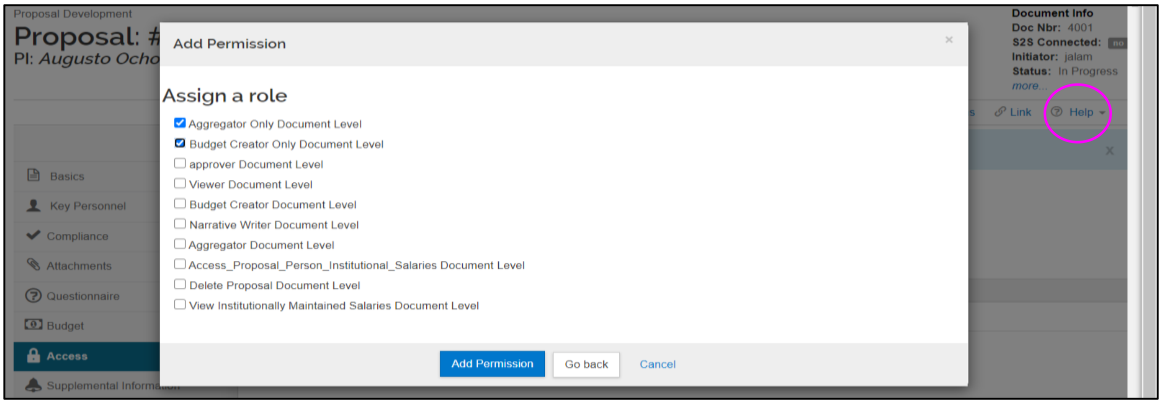


145. Select the person from the retrieved list and click **Continue**.



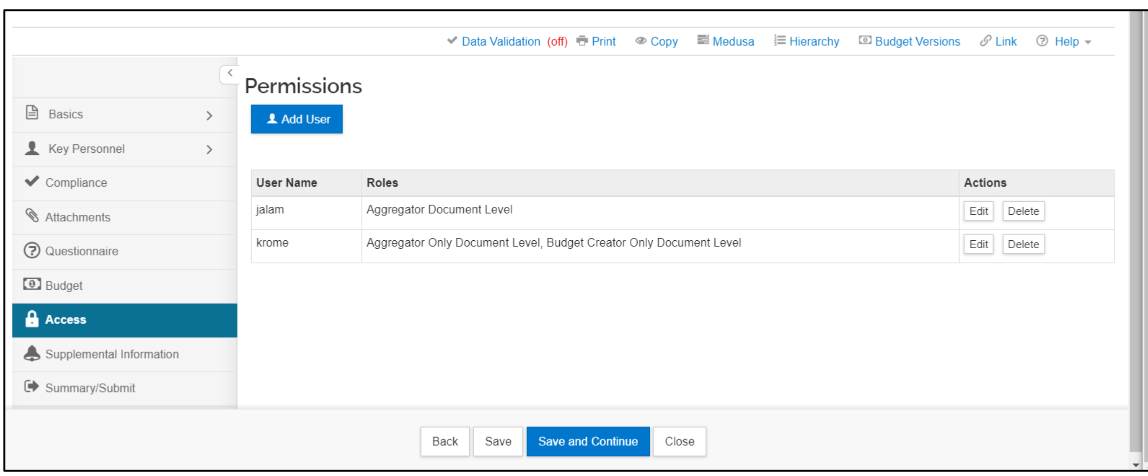
Access (cont.)

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.*



147. Provide permission to other individuals as needed.

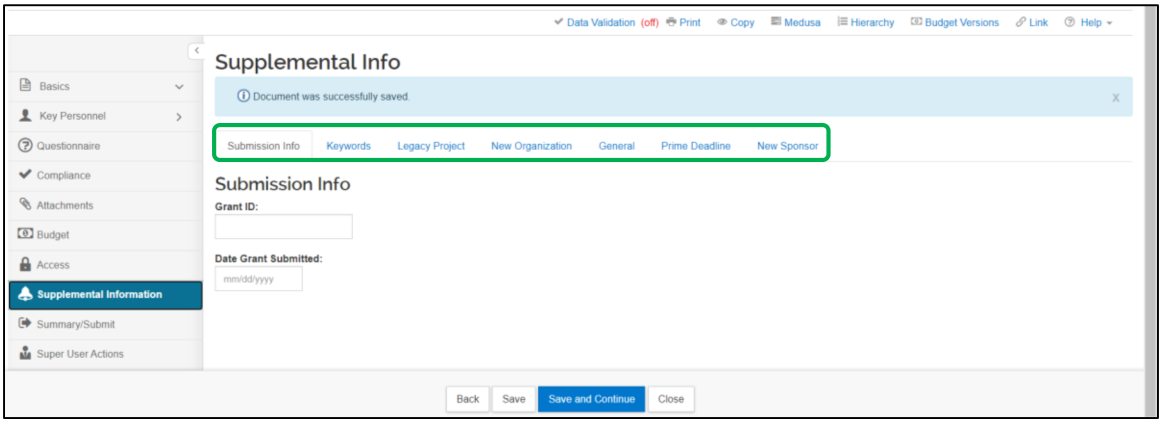
148. When finished, click **Save and Continue**.



Supplemental Information

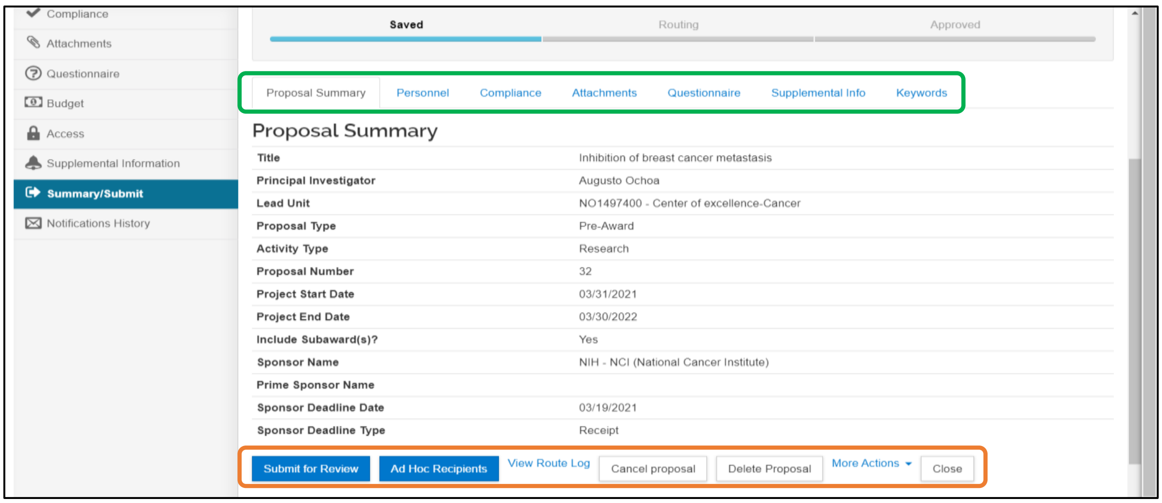
149. On the **Supplemental Info** page, click on individual **tabs** to provide additional information.
    - **Submission Info** – Do not enter any values on this tab. **For OGC use only**.
    - **Keywords** are required. *To retrieve the Keyword code, search with a descriptive word or partial word 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**.

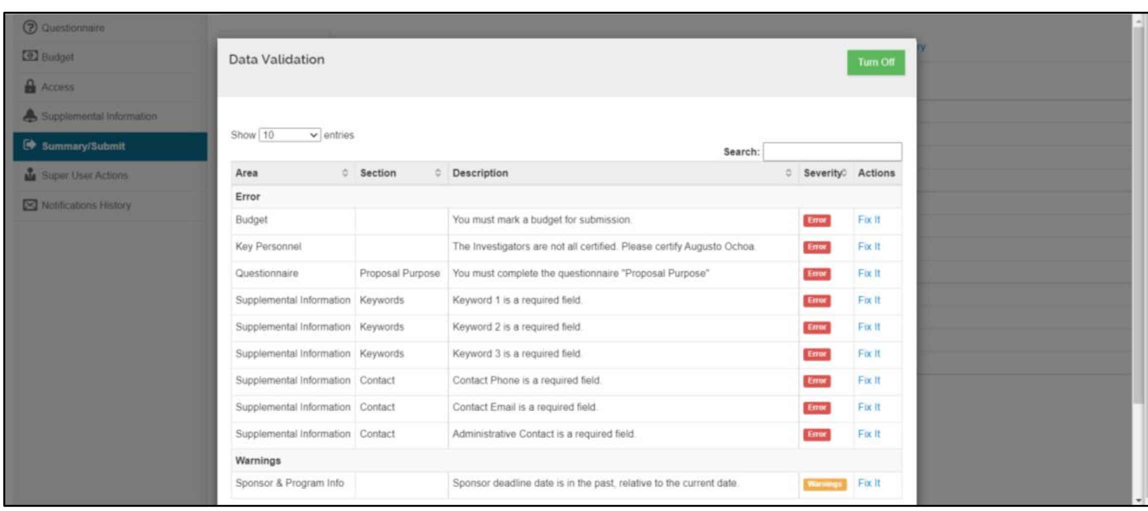


Summary/Submit

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**.



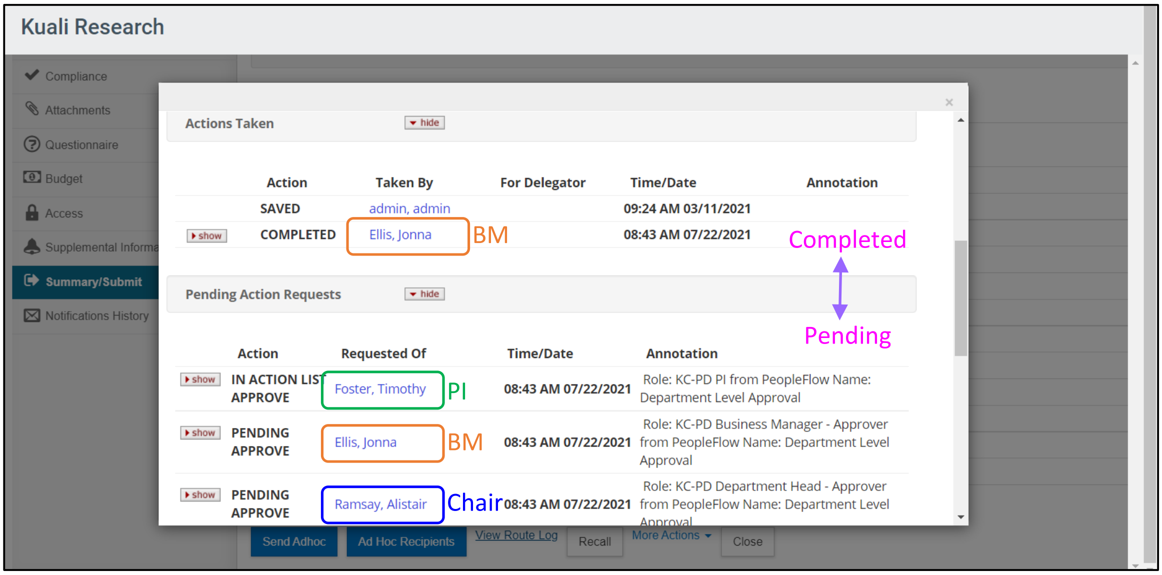
154. If the form is incomplete, Errors and Warnings will be listed.
155. Fix the Errors and again submit for review.



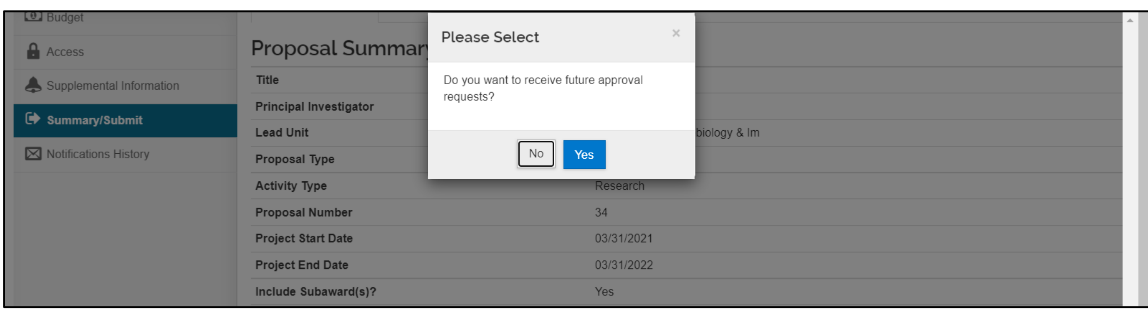
156. The proposal will route for reviews and approvals. You can view the routing path and the current location of the proposal by clicking on **View Route Log** (see Step 157). A diagram of the path is shown on the next page, after which additional instructions are provided.

Review & Approval Path

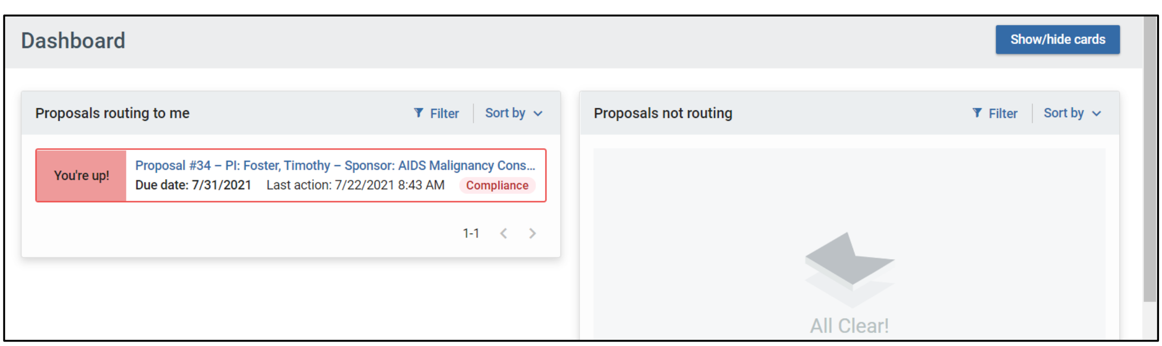
157. Sometimes the Proposal Creator and a Proposal Approver may be the same person (*e.g.*, a dept business manager (BM)).



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



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.



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.