OFFICE OF GRANTS & CONTRACTS

KUALI QUICKGUIDE
APPROVING PROPOSALS

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

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

1. Click on the **first link** in the email.
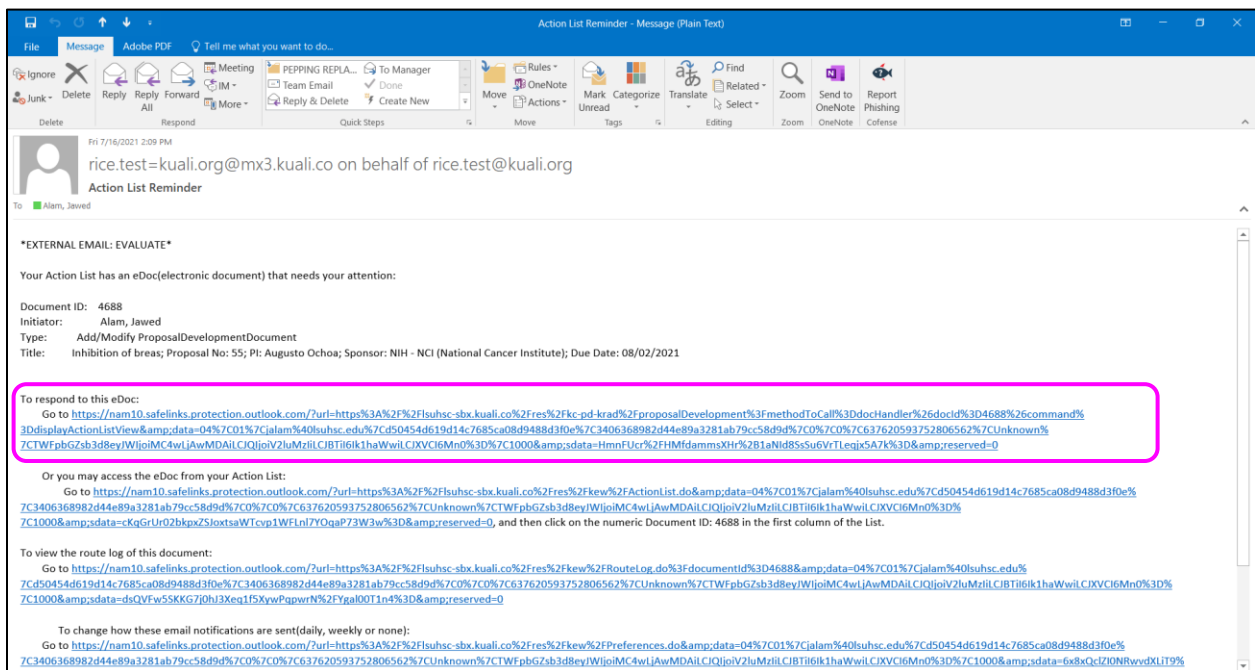
2. You will be asked to sign into Kuali using your LSUHSC credentials. *The user name is your full LSUHSC email address.*

3. You will be taken directly to the **Proposal Summary page** of the **Summary/Submit panel** of the document.

   a) You can review a summary of each panel of the proposal by clicking on the **tabs at the top of the page**.

   b) **Note:** There will be no entries in the **Keywords** section. This information is collected in the **Supplemental Info** section.

   c) To review attachments click on the **Attachments tab** and then click the **Internal tab**. Information to be reviewed by the Office of Innovation & Partnership or Properties & Facilities will typically be found in the Attachments panel.

   d) You may also review detailed information in each panel by clicking on the **tabs in the left side menu**.
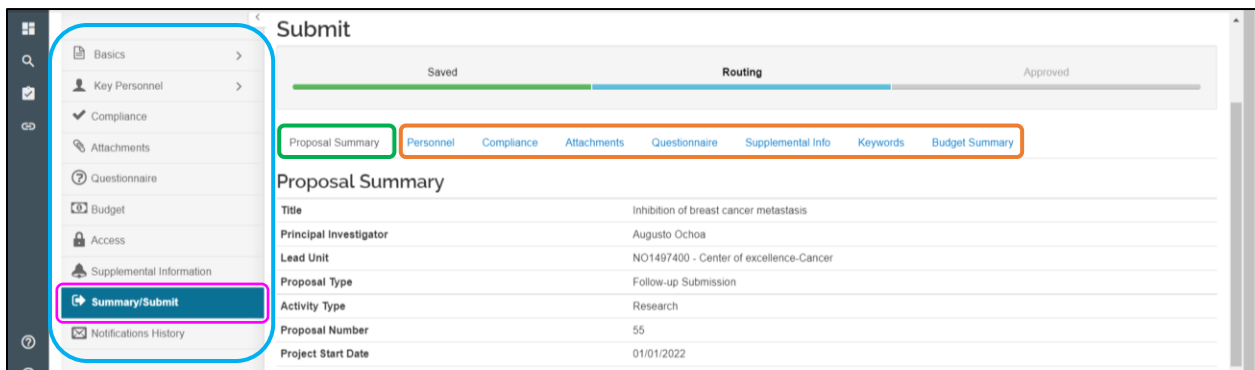

4. Scroll to the bottom of the **Proposal Summary** page to see the various **action items**.
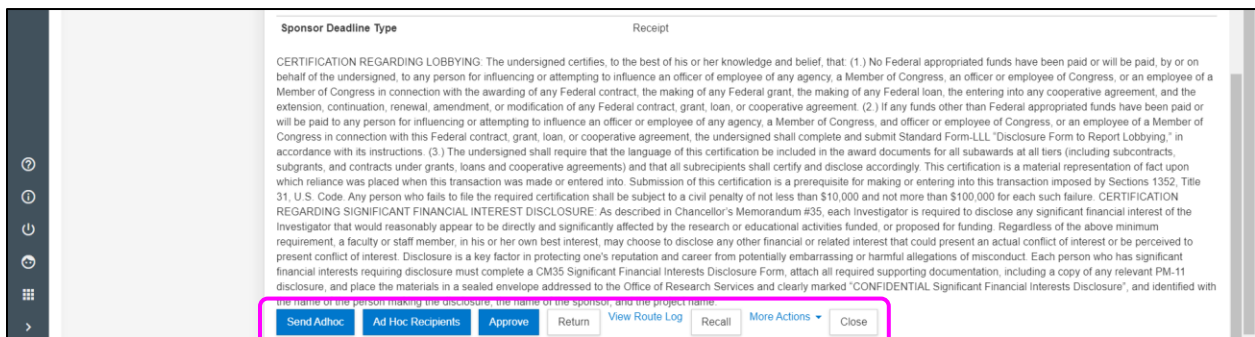
5. If you need the **initiator** to revise the proposal or provide additional information, click the **Return** button. Make sure to describe the **reason for returning** the proposal to the **initiator**.
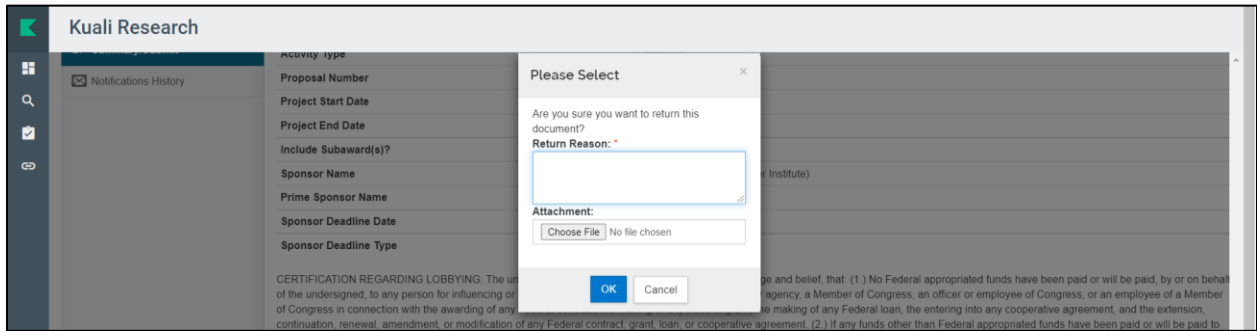

6. If you do not require revisions to the proposal but would like to discuss any matter with an individual involved in creating or approving the proposal (or otherwise has access to the proposal in Kuali), click the **More Actions** button and select **Send Notification**.
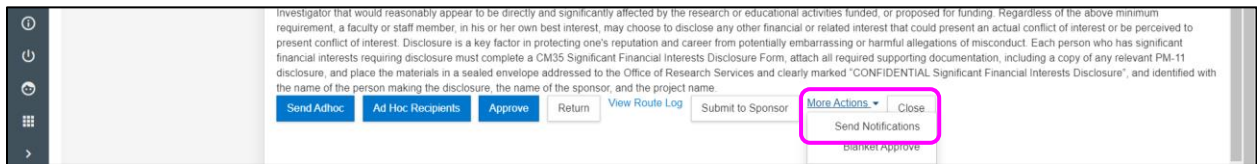
7. Select **Employee**, enter the person's name, user name or email address and press **Search for Recipients**.
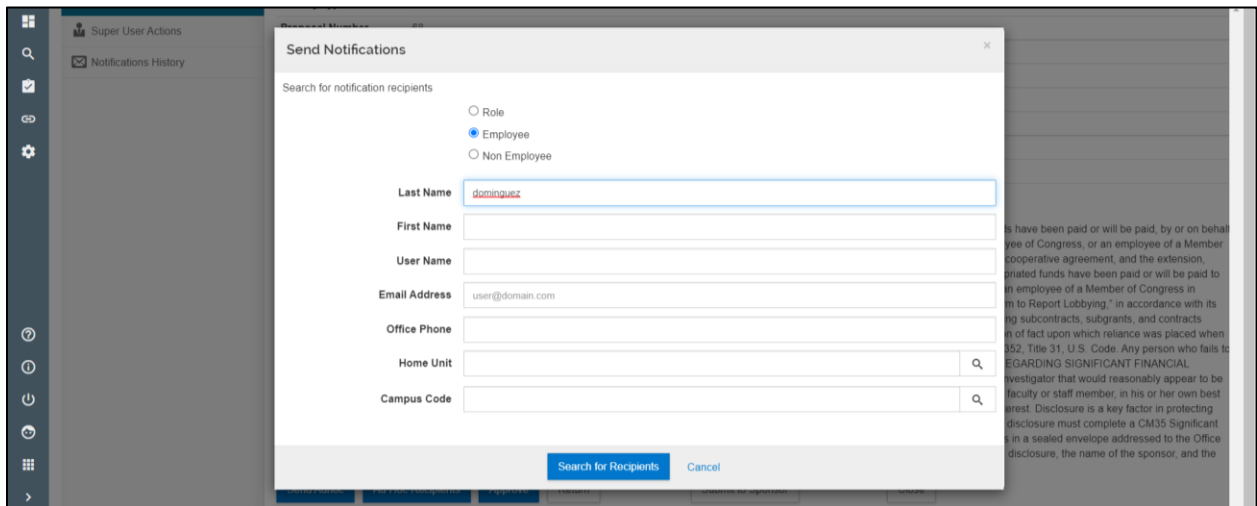
8. Select the correct person from the list and press **Add Recipients**.
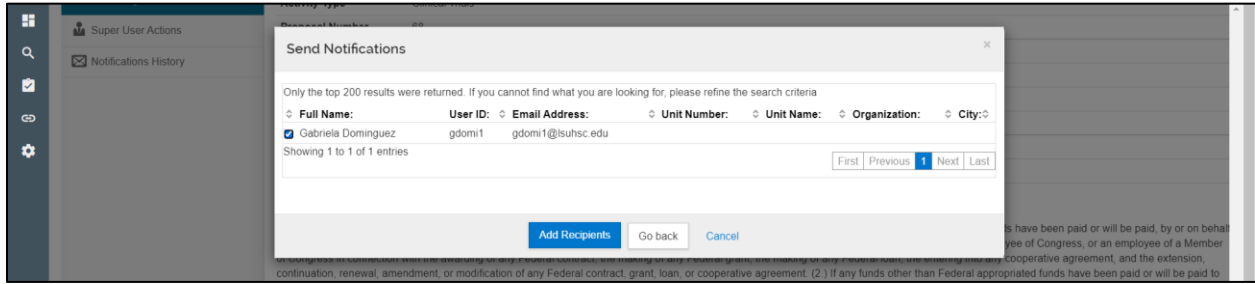
9. **Add More Recipients** if desired. The **subject** line will be auto-populated with the Proposal # and title. Compose the message and press **Send Notifications**.
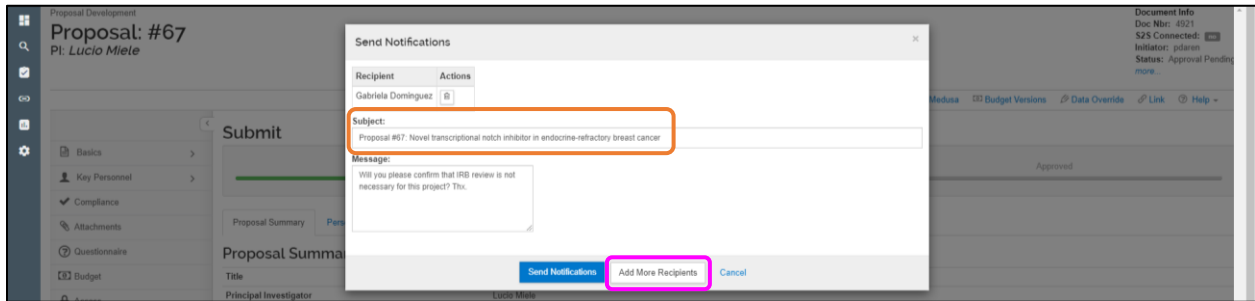
10. The email message will be sent to the selected recipient(s) and you can confirm the notification in **Notification History**.

11. When the proposal meets your approval, click **Approve**. See figure at Step 4.
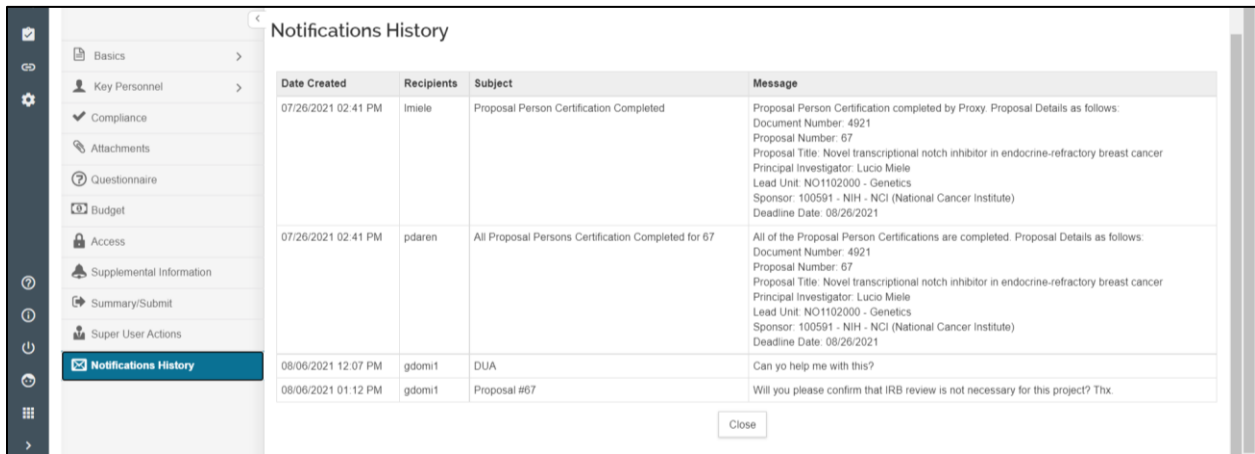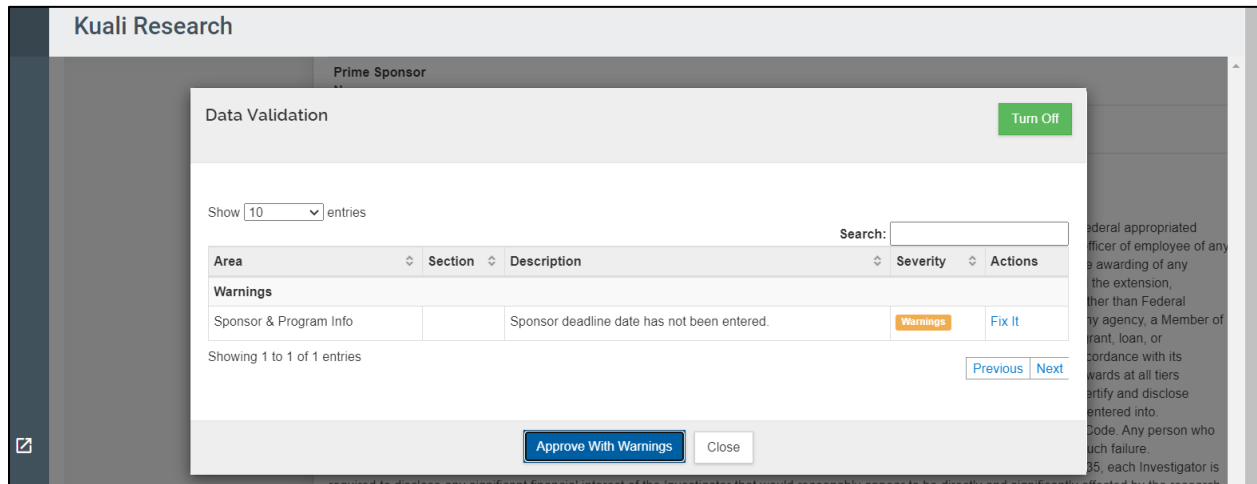
   a) If the proposal was submitted with an unfixed item, a pop-up window will describe the item. The severity of the deficiency will be a **Warning** (proposals with **Errors** cannot be routed for approvals).

   b) If you want the **Initiator** to fix the **Warning**, then **Return** the proposal as described above.

   c) Otherwise, click **Approved With Warnings** to continue routing the proposal.

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

   a) The **Return** and **Approve** buttons will no longer be available to you but you will have the option to **Recall** your previous action.

   b) Click **Close** to log out of the proposal.

Key

Creation / Review / Submission	(blue)
Required Approval	(green)
Condition Based Approval	(orange)

Approval Path

Proposal Creator

↓

Principal Investigator

↓

Business Manager

↓

Department Head

↓

Select Schools only → **Dean**

↓

Office of Grants & Contracts

↓

Office of Innovation & Partnership

↓

Properties & Facilities Management

↓

Office of Grants & Contracts

↓

Sponsored Projects Accounting

↓

Office of Grants & Contracts

↓

VCAA

↓

Office of Grants & Contracts

↓

Submission

OGC may return the proposal to the initiator for revisions. Subsequent routing will bypass PI, BM, & Dean