How To Review/Approve an MOU Form Sent by OPAM in Kuali Build

When the Office of Post Award Management (OPAM) sends out a Memorandum of Understanding (MOU) for approval, the Primary PI (1st listed) will receive an email letting them know that OPAM needs their input on the MOU form being sent:

UMassAmherst

Dear Cohen, Bradley T,

OPAM needs your input on the MOU sent for the following record:
015000-00000

When you receive the approval request (imminently), please fill all required fields on the form prior to approving. Once you approve, it will be sent to any further parties for approval (Co-PIs, and Dept. Chairs/Col. Deans if RTF change listed).

Thank you,

OPAM

The Primary PI is sent an Approval for the MOU so that they can complete the required fields on the form:

UMassAmherst

Hello Bradley, your attention is required:

Form Name: MOU
Step Name: P01 APPROVAL
Your Action: APPROVAL

If you click “Begin Review” in the email, it will open your browser and take you to a UMass login page that looks like this:
Sign in with your UMass NetID and password.

You will be brought to the form that requires your review and approval.

![Form](image)

**NOTE:** You can also access ALL Kuali Build approvals awaiting your approval via your Action List.

The **Primary PI** must complete all required fields showing on the form.

If there has been a change to the RTF Distribution, selecting Yes will populate the form with the applicable fields:

- Has there been any change to the RTF distribution? *
  - Yes
  - No

<table>
<thead>
<tr>
<th>PI Name</th>
<th>Role</th>
<th>Business Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cohen, Bradley T (<a href="mailto:btchern@umass.edu">btchern@umass.edu</a>)</td>
<td>PI</td>
<td>Account, HRService (<a href="mailto:tresearch@umass.edu">tresearch@umass.edu</a>)</td>
</tr>
</tbody>
</table>

Office of Research & Engagement
To select the correct Department and College, start typing the name in the fields provided and click on the right one to select it:

Kuali Unit Approvers will receive approvals for this form based on the selections made.

Enter the RTF amounts in the appropriate fields:

Once you have reviewed/completed the form, the approval actions can be found on the right-hand side of the form:
You have a few options:

- **Approve** will allow you to approve the form and add comments.
- **Deny** will allow you to reject the form and add comments.
- **Send Back** will give you the option to send the form back to a specific step in the workflow with comments.
  - For Example: You are a Dept. approver, and want the Primary PI to make changes to the form. You can choose to send back the form to PI01 Approval step for changes.

**Send Back Options**

Send back to
- Form Submission
- PI01 Approval

Finish

- The Primary PI would then receive a notification alerting them to this.

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**From:** no-reply@kuali.co

**To:** blicohe@umass.edu

**Subject:** An item has been sent back to you

**UMassAmherst**

Hello Cohen, Bradley T,

An Item has been sent back to you in the following app:

MOU

View Item

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**NOTE:** Send Back will restart the workflow from the point it was sent back to. Any approvals already made will need to be made again.

Once the Primary PI completes the form and approves, it will move forward in the workflow. Approvals will be sent to all PI/Co-PI’s listed on the form, as well as any Department Head/Dean approvals if there is an RTF Change.

**NO OTHER APPROVERS SHOULD ALTER THIS FORM IN ANY WAY. IF FIELDS ARE MODIFIED FROM WHAT THE PRIMARY PI ENTERED, A NEW MOU MUST BE SENT OUT TO PRESERVE DATA INTEGRITY.**

How do I see where a submission is in the workflow process?
• On the left side of the Approval screen you will be able to toggle between the **Review** and **Status** options.

• **Review**: you will be able to review the form and approve, deny, or send it back to a previous stage.

• **Status**: you will be able to see where the form is at in the workflow process, including comments that were made when the form was approved or denied in a previous step.