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 approval notification letting them know that OPAM needs their input on the MOU form being sent:

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 email and password. Authenticate with Duo Two-Factor Authentication if prompted.
You will be brought to the form that requires your review and approval.

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

The Intellectual Credit amount must complete for all personnel listed on the form:

- The total figure across all personnel must equal 100%
- Unless the award is a Fellowship, each of the CO-PI would receive recognition percent greater than zero.

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

```
Has there been any change to the RTF distribution? *

- Yes
- No
```
To select the correct Department and College, start typing the name in the fields provided and click on the right one to select it:

### Department *

- Biology
- BS/UM PVCNI - Biology
- Biochemistry/Molecular Biology
- Microbiology
- Molecular Cellular Biology
- Plant Biology

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

Enter the RTF amounts in the appropriate fields:

### RTF Change

<table>
<thead>
<tr>
<th>Listed PI</th>
<th>PI RTF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department *</th>
<th>Department RTF</th>
<th>College RTF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept: Biology</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

If your RTF change includes the need to add additional units that aren’t already referenced under the personnel, you have an opportunity to do so by selecting “Yes” to this question:
You have the option to add up to 3 additional units for the RTF distribution. This is done below any listed personnel on the form:

The Department and College fields here behave the same as earlier in the form.

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.
- **Save** will allow you to save your progress on the form if you need to finish it later. You can access the form again by opening it from either the Approval notification or your Build Action List.
- **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

From: no-reply@kuali.co
To: i
Subject: An item has been sent back to you

UMassAmherst

Hello
An item has been sent back to you in the following app:
MOU

NOTE: Send Back will restart the workflow from the point it was sent back to. Any approvals already made after that workflow step 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.

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. This is only able to seen until you send the form to the next workflow step.

- **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.