Kuali Proposal Development - BASICS
UMass Amherst Best Practices & Kuali Knowledge Base Guide

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• Kuali Knowledge Base Field Definitions by Tab:

BASICS SECTION

• TIP: Use Wildcard asterisk (*)before and after*) to assist with searching for sponsors, people, etc. in Kuali.
• Kuali Knowledge Base Field Definitions by Tab -
• If UMass is a subrecipient, indicate entity submitting proposal in Sponsor section. Include Prime Sponsor in the Sponsor Code. Ex. UMass is a proposed sub to Harvard on a NSF proposal.
• No need to indicate a keyword.
• Delivery Information - Insert relevant User Name & Password as needed in the Submission description field.
• Sponsor & Program Information – UMass in now requiring faculty to identify their proposal with a NSF Science Code even if the proposal is not to NSF. This will assist with campus-wide reporting.
• Organization & Location – Only add additional organizations like subrecipients to the Other Organizations tab.

KEY PERSONNEL

• Details – add eRA Common user name and click whether this person should be include in the RTD and Intellectual Credit Distributions.
• Organization – Include faculty Percent of Effort in the First year of the proposal. This data will assist with annual Effort Certification.
• Extended Detail, Degrees & Person Training Details – NOT being used by UMass Amherst at this time.
• Unit Details – This is where you can add Centers & Institutes for routing, RTF distribution, and future reporting. Note: UMass cannot retroactively assign proposal to Centers and Institutes after the proposal is submitted to the sponsor. To search, click on Lookup/Add Multiple Line.
• Proposal Person Certification - New questions that Faculty will have to fill out themselves during the proposal routing process.
CREDIT ALLOCATION

- This section is where you indicate both the RTF and Intellectual Credit distribution.
- Investigator Total should equal 10% and the Unit Totals should cumulatively add to 16%.
- Intellectual credit should only be filled out on the Faculty fields and should equal 100%.

COMPLIANCE

- Choices to add in the Compliance Section are: Animal and Human Subject Research, Institutional Biosafety, Conflict of Interest, and Clinical Trial.
- Adding entries here are over and beyond the items on the Questionnaire.
- Adding entries here Link to GRANTS.GOV required field and forms.
- In most cases, it is typical to select Pending in the Approval Status.

ATTACHMENTS

- The Attachments section is the primary repository for most proposal documents on Grants.gov submissions.
- The Internal tab is for UMass specific documents needed for OPAS review but do not get sent to the sponsor.
- Users can upload documents in bulk to minimize effort.
- All documents must be marked Final in order to route proposals. This include Draft Narratives.

QUESTIONNAIRE

- The Questionnaire replaces the SmartGrant Internal Processing Form (IPF).
- When submitting a GRANTS.GOV proposal, additional tabs appear to assist in populating certain fields in the proposal form set.

ACCESS & SUPPLEMENTAL INFORMATION TABS

- Users can add access on a proposal by proposal basis in the Access section.
- Please include both Pre-award and Post-award administration in the Supplemental section.

SUMMARY/SUBMIT