

## Kuali Proposal Development - System to System (S2S) Grants.Gov UMass Amherst Best Practices & Kuali Knowledge Base Guide

Version 2: 1/21/21

### LOG IN

<https://umass.kuali.co/dashboard>

### GET HELP

- The **Help Icon** in Kuali brings you to Kuali knowledge base:  
<https://kuali-research.zendesk.com/hc/en-us/categories/115001645868-Knowledge-Base>
- Research & Engagement website: [www.umass.edu/research/kuali-guides](http://www.umass.edu/research/kuali-guides)
- Kuali Knowledge Base **Field Definitions by Tab**:  
<https://kuali-research.zendesk.com/hc/en-us/articles/115012912788-Proposal-Field-Definitions-by-Tab>
- TIP: Use **Wildcard asterisk (\*before and after\*)** to assist with searching for sponsors, people, etc. in Kuali.

### OVERVIEW

Kuali is an all-in-one software system that connects directly to Grants.gov for proposals that require submission through this portal.

<https://kuali-research.zendesk.com/hc/en-us/articles/115010655707-S2S-Overview>

### FINDING YOUR OPPORTUNITY

<https://kuali-research.zendesk.com/hc/en-us/articles/115010656747-S2S-Opportunity-Lookup>

### S2S (GRANTS.GOV) FORMS

<https://kuali-research.zendesk.com/hc/en-us/articles/115010656767-S2S-Forms-Panel>

- **Form Name**: Lists the forms by name and version number. Also, these forms are clickable and will pull down the fillable PDF form from Grants.gov which can be useful if you need to upload as a user attached form – see “User Attached Forms” below – only use this option if the form is marked as **Unavailable** or you need to override a system created form.
- **Mandatory**: Describes if the form is required (mandatory) or optional for the associated Opportunity.
- **Include**: Defaults to **Yes** for mandatory form. Click an individual checkbox to include an optional form. Also, the **Include column** header can be selected to provide the options to **Select All** and **Select None**.
  - If this is an NIH Proposal you **must** select to include either an **R&R Budget** or a **Modular Budget**.
- **Description**: Status of the S2S form;
  - **Available** means the form and version are maintained and populated for S2S submission by the Kuali proposal data.
  - **Unavailable** means that the form and/or version is not maintained by Kuali proposal data. If unavailable, you can upload a manually completed version of the unsupported form via the “User Attached Forms” process. The forms can either be obtained in the **Forms** panel provided on the list of forms on the left side of the screen; or if not available and otherwise required by the solicitation, the unstitched forms can be obtained from Grants.gov (<https://www.grants.gov/web/grants/forms.html>).

### USER ATTACHED FORMS

<https://kuali-research.zendesk.com/hc/en-us/articles/115010656807-S2S-User-Attached-Forms>

## ATTACHING S2S GRANTS.GOV REQUIRED DOCUMENTS

<https://kuali-research.zendesk.com/hc/en-us/articles/115015569247>

- Navigate to the Kuali Research **Attachments** section.
- UMass only uses the **Proposal** and **Personnel** tabs when submitting S2S/Grants.gov based proposals (do **not** use the Proposal or Personnel tabs for non-Grants.gov proposals). These folders will generally house the majority of documents routed to the sponsor – one exception is with the NIH in its use of the PHS Human Subjects and Clinical Trial Information form
  - NIH proposals that include human subject research: The PHS Human Subjects and Clinical Trial Information form is loaded to the **Compliance** section via the file browser **Human Study Attachment**. For more details see the Quick [Guide on Human Subject Study Record Attachment](#).
- Some sponsors include a requirement to use that is also called an “Attachments Form” – documents that must map to this form are still loaded through the **Proposal** tab, but be sure to add a unique description for each document and observe sponsor driven file name conventions. Details: <https://kuali-research.zendesk.com/hc/en-us/articles/115010827608-S2S-Attachments-Form-Instructions>
- Go to the **Proposal** tab to upload non-personnel related documents.
- Select the **+Add** button or **Drag and Drop** to upload multiple attachments. Let go of the mouse (drop) when **+copy** appears – do not drop when **→ move** shows. Hover over the blue tab **Upload and Add**.
- Make sure to select an **Attachment Type** to associate with your file. It is critical to select the correct **Attachment Type**. The Attachment types are very specific and map to the appropriate section of the sponsor proposal. If the document gets linked to the wrong attachment type, it will not be positioned in the correct location within the final synthesized proposal. This could create grounds for a proposal to be rejected by the sponsor.
- Select **Status** and choose either **Final** or **Draft**. Shortcut: Instead of picking from the **Status** drop down for each document, click the **Select** option at the right of the screen, select **Final** for example, and then select **Set All Statuses**. Then go back and reselect the Status options for the individual documents that should for example be in “Draft” form. The Science/Technical documents can be routed in draft form, with the final documents to be loaded and updated and status set to “Final” within 48 hours of the proposal deadline.
- In the Proposal tab when you add an **Attachment Type** of “Other” you must add a Description. This Description will map as the **File Name** into the proposal.
- Once done loading to the **Proposal** folder, select the **Personnel** tab to upload **Biosketches** and other personnel documents required by the sponsor – only load mandatory attachment types (e.g. don’t load Current & Pending for NIH).

## QUESTIONNAIRE

Depending on the federal agency and solicitation requirements, there will be additional tabs in the **Questionnaire** section of the proposal. These must be completed in order to populate data in certain Grants.gov forms.

<https://kuali-research.zendesk.com/hc/en-us/articles/115010827528-S2S-Supported-Form>

## PRINTING GRANTS.GOV FORMATTED PROPOSALS

Go to the **S2S Opportunity** page in the **Basics** section of the proposal record. Click **Forms**, then select the forms that will be submitted to the sponsor. Select **Create PDF**.

## DATA VALIDATIONS

When in doubt, use Data Validations to verify whether you are missing any data or documents.