

QUICK GUIDE

TAGGING CENTERS & INSTITUTES for PROPOSAL AFFILIATION

Objective: Kuali now offers the ability for faculty to identify and affiliate their proposal with active Centers and Institutes. This offers the opportunity to gain insight and run reports on Center and Institute productivity and allows RTF to be manually assigned to a Center or Institute based on identified and approved distributions. It is also the mechanism to add Center and Institute approvers to the proposal routing and approval list (as is the case for Institute for Applied Life Science, IALS, proposals).

STEP 1 - Log in to the Kuali Dashboard - <https://umass-sbx.kuali.co/dashboard/> with your NetID and password and click **Create Proposal**.

STEP 2 - Enter the relevant information under the **Basic** tab to create a proposal.

STEP 3 - Click the **Key Personnel** tab on left and click the **arrow** next to the Lead PI's name.

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Key Personnel

Search for and add key personnel

[Add Personnel](#) [Notify All](#)

▼ **Serena T Williams (PI/Contact) (Certification Incomplete)** [Notify Serena T Williams](#)

Project Status: Update Needed Annual Disclosure Status: Not Yet Disclosed Disposition Status: None

Details Organization Extended Details Degrees Unit Details Person Training Details Proposal Person Certification

Details

Proposal Person Role Id: PI/Contact

Full Name: Serena T Williams User Name: stwilliams

First Name: Serena Last Name: Williams

Middle Name: T eRA Commons User Name: SERENAW

NSF ID: Include In Credit Allocation:

▶ **Bethany T Hamilton (Co-Investigator) (Certification Incomplete)** [Notify Bethany T Hamilton](#)

Project Status: Update Needed Annual Disclosure Status: Not Yet Disclosed Disposition Status: None

STEP 4 - Click the **Unit Details** tab.

Serena T Williams (PI/Contact) (Certification Incomplete) [Notify Serena T Williams](#)

Project Status: Update Needed Annual Disclosure Status: Not Yet Disclosed

Details Organization Extended Details **Unit Details** Person Training Details Proposal Person Certification

Unit Details

Lookup/Add Multiple Lines

Show 10 entries [csv](#) [xml](#) [xls](#)

	Unit Number	Lead Unit?	Actions
Cntr: Models to Medicine	A006300		Delete
Coll: Athletics - TEST	A0990		Delete
Dept: Athletics - TEST	A009000	Lead Unit - Cannot delete	Delete

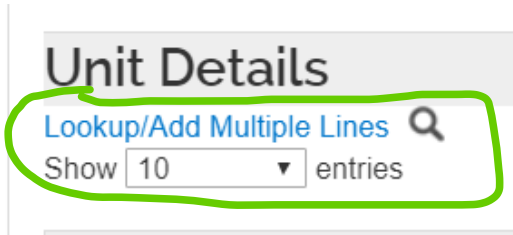
Showing 1 to 3 of 3 entries [First](#) [Previous](#) [Next](#) [Last](#)

▶ **Bethany T Hamilton (Co-Investigator) (Certification Incomplete)** [Notify Bethany T Hamilton](#)

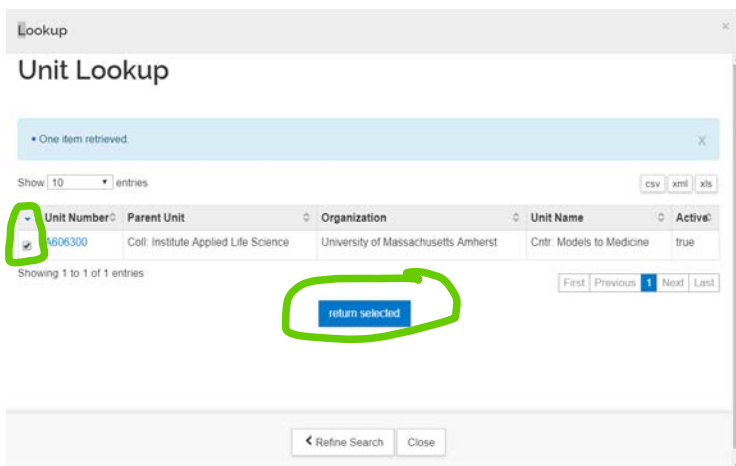
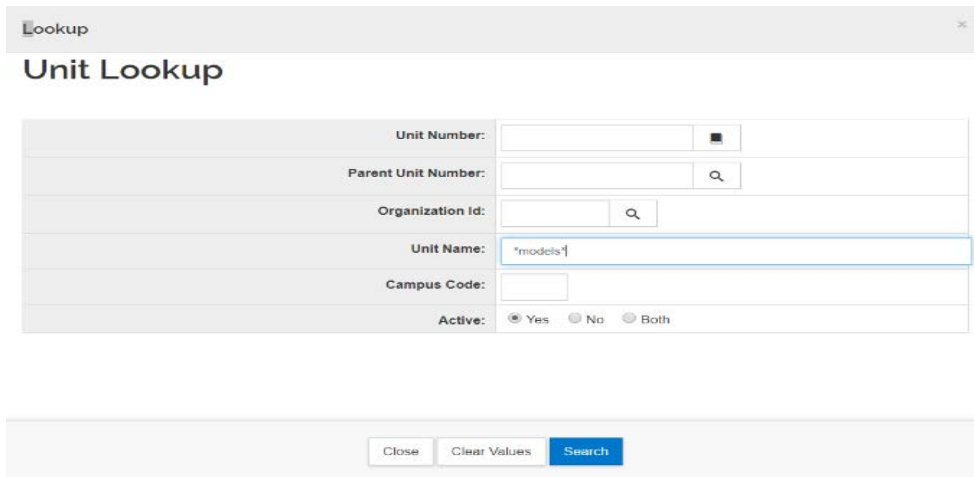
Project Status: Update Needed Annual Disclosure Status: Not Yet Disclosed

STEP 5 - Click **Lookup/Add Multiple Lines** as shown below. When the appropriate Center information appears, check the box as indicated below and click **return selected**.

TIP: Use **Wildcard asterisk (*before and after*)** to assist with searching for a specific Center or Institute.



The below screen should appear



STEP 6 - Centers and Institutes will be added to the **Credit Allocation** page. Assign the appropriate amount of RTF, if required.

NOTE: RTF credit allocation is an optional entry. For example no RTF allocations are needed for IALS related centers (Models to Medicine, Center for Bioactive Deliver and Center for Personalized Health Monitoring). RTF allocations for IALS will be taken care of at the time of setting up an award.

IMPORTANT: Regardless of how many PIs you have on the file or how the Intellectual Merit is split up, make sure that each PI has **100** listed next to their department line.

Kuali Research

more...

Data Validation (on) Print Copy Medusa Hierarchy Budget Versions Link Help

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Key Personnel

Personnel

Credit Allocation

Compliance

Attachments

Questionnaire

Budget

Access

Supplemental Information

Summary/Submit

Notifications History

Credit Allocation

Refresh View

	RTF	Intellectual
Lili He	10	80
A011300 - Dept: Food Sciences	8	100
A4321 - Coll: Natural Sciences	8	0
A606400 - Cntr: Personalized Health Monitoring	0	0
Unit Total:	16	100
Amanda J Kinchla	0	20
A011300 - Dept: Food Sciences	0	100
A4321 - Coll: Natural Sciences	0	0
Unit Total:	0	100
Investigator Total:	10	100

STEP 7- This step is ONLY for Center and Institutes that require to be added to the proposal for routing and approvals.

Ensure that all relevant personnel are in the routing log. For all IALS (Models to Medicine, Center for Bioactive Delivery and Center for Personalized Health Monitoring) related questions, please reach out to nsampath@umass.edu.

NOTE - Reference the Quick Guide on [Routing and Approving Proposals](#) for more information.

Budget

Access

Summary/Submit

Notifications History

Proposal Summary Personnel Credit Allocation Compliance Attachments Questionnaire

Proposal Summary

Title: Test Proposal

Principal Investigator: Serena T Williams

Lead Unit: A999999 - Dept: Athletics - TEST

Activity Type: Research

Proposal Number: 602

Project Start Date: 10/01/2019

Project End Date: 09/30/2022

Include Subaward(s)? Yes

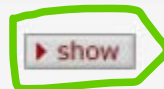
Sponsor Name: NIH-NATIONAL INSTITUTES OF HEALTH








Sponsor Deadline Date: 08/01/2019

Sponsor Deadline Type: Receipt

Submit for Review Ad Hoc Receipts View Route Log Cancel proposal More Actions Close

Future Action Requests



	Action	Requested Of	Time/Date	Annotation
	PENDING APPROVE	Williams, Serena T	10:16 AM 06/07/2019	Role: KC-PD PI from PeopleFlow Name: PI Proposal Approval
	PENDING FYI	A606300 Email CC	10:16 AM 06/07/2019	PeopleFlow Name: Prop Dev Email CC A606300
	PENDING FYI	A606200 Email CC	10:16 AM 06/07/2019	PeopleFlow Name: Prop Dev Email CC A606200
	PENDING FYI	A4321 Email CC	10:16 AM 06/07/2019	PeopleFlow Name: Prop Dev Email CC A4321
	PENDING APPROVE	A606200 Approver (Primary)	10:16 AM 06/07/2019	PeopleFlow Name: Prop Dev Routing A606200
	PENDING APPROVE	Hamilton, Bethany T	10:16 AM 06/07/2019	Role: KC-PD COI from PeopleFlow Name: Multi PI Col Approval
	PENDING APPROVE	A4321 Approver (Primary)	10:16 AM 06/07/2019	PeopleFlow Name: Prop Dev Routing A4321
	PENDING APPROVE	A606300 Approver (Primary)	10:16 AM 06/07/2019	PeopleFlow Name: Prop Dev Routing A606300

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KUALI HELPDESK: <https://www.umass.edu/research/webform/kuali-help-desk>