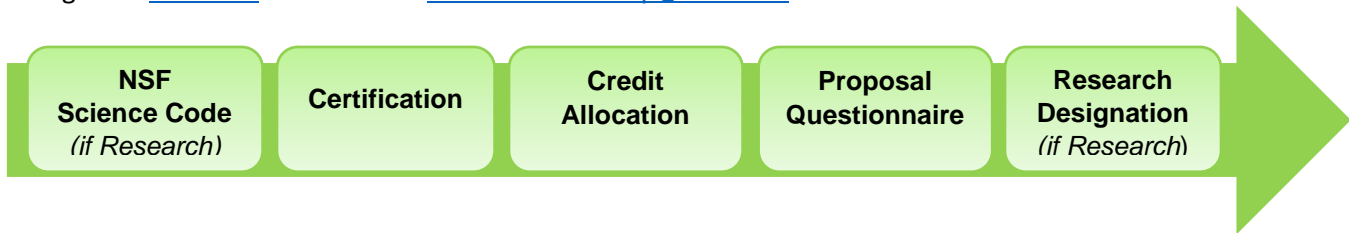


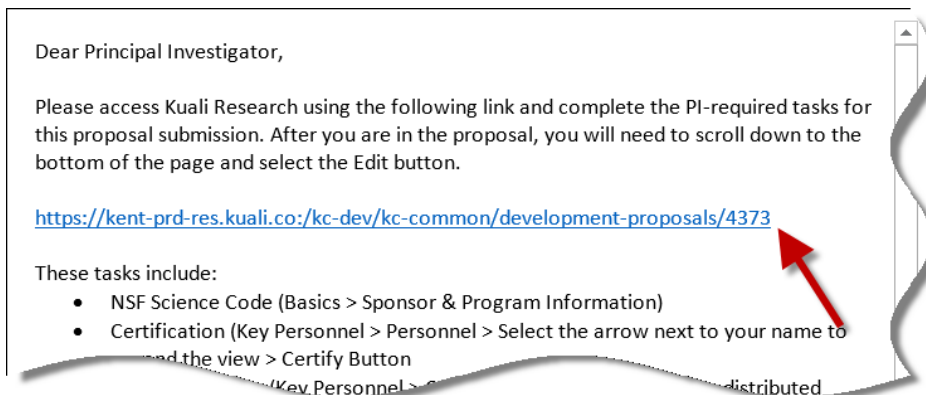
Kent State **Kuali Research**

Proposal Tasks for Principal Investigators

The following instructions will guide you through the process of certifying the proposal and answering sponsor application and KSU specific questions. These must be completed prior to routing the proposal for electronic approval and submission to the sponsor. Additional Kuali support information is available on the Sponsored Programs' [Kuali Site](#) or contact us kuali-research-help@kent.edu for further assistance.



1. You will receive an email from your Sponsored Programs, CFR, or Dept./College grant contact requesting that you complete the components required for the proposal to be routed internally. Please use the link included in that email message as it will take you directly to the proposal record.



2. If you are not already logged into FlashLine in your web browser, you may be directed to Kent's CAS log in page. Please enter your FlashLine ID and password and select **Login** to proceed to Kuali Research.

3. Quali Research should display the *Basics > Proposal Details* page for the proposal. Scroll down to the bottom of the page and select the **Edit** button. You can also review the Project Title, Start and End Dates, and Sponsor information.

The screenshot shows the 'Proposal Details' page. On the left is a sidebar with menu items: Questionnaire, Budget, Access, Supplemental Information, Summary/Submit, and Super User Actions. The main content area has a 'Keywords:' label. At the bottom, there are three buttons: 'Edit', 'Save', and 'Close'. The 'Edit' button is highlighted with a red box, and a red arrow points to it from the right.

4. If the project type is Research, please navigate to the *Basics > Sponsor & Program Information* section and select the **NSF Science Code** which best matches the disciplinary field of this project. This item is required for all research proposals, regardless of funding agency. If this proposal is not for research activity, you may skip this step and proceed to 5.

The screenshot shows the 'Sponsor & Program Information' page. On the left is a sidebar with menu items: Basics (expanded), Proposal Details, Delivery Info, Sponsor & Program Information (highlighted with a red box), Organization and Location, Key Personnel, Compliance, Attachments, Questionnaire, Budget, Access, Supplemental Information, Summary/Submit, and Super User Actions. The main content area has a title 'Sponsor & Program Information' and a message 'Document was successfully saved.' Below this are several form fields: 'Sponsor deadline:', 'Sponsor Deadline Type:', 'Notice of Opportunity:', 'Opportunity ID:', 'CFDA Number:', 'Subawards:', 'Sponsor Proposal ID:', 'NSF Science Code:', 'Anticipated Award Type:', 'Agency Routing Identifier:', and 'Prev Grants.Gov Tracking ID:'. The 'NSF Science Code:' dropdown menu is open, showing a list of codes including Engineering-Mechanical: A.06, Engineering-Metallurgical/Materials: A.07, Environ. Sci.- *Other: C.99, Environ. Sci.-Atmospheric: C.01, Environ. Sci.-Earth Sciences: C.02, Environ. Sci.-Oceanography: C.03, Life Sci.- *Other: F.99, Life Sci.-Agricultural: F.01, Life Sci.-Biological: F.02 (highlighted with a blue bar), Life Sci.-Medical: F.03, Mathematical Science: D.01, Physical Sci.- *Other: B.99, Physical Sci.-Astronomy: B.01, Physical Sci.-Chemistry: B.02, Physical Sci.-Physics: B.03, Psychology: G.01, Social Sci.- *Other: H.99, Social Sci.-Economics: H.01, Social Sci.-Political Sciences: H.02, and Social Sci.-Sociology: H.03. A red arrow points to the 'NSF Science Code:' dropdown menu. At the bottom, there are four buttons: 'Back', 'Save', 'Save and Continue', and 'Close'.

5. Next, please navigate to *Key Personnel > Personnel* and select the arrow next to your name to expand the details. Select the **Certification** link to complete your certification questions.

The screenshot shows the 'Key Personnel' section of a web application. On the left sidebar, the 'Personnel' link is highlighted with a red box. The main content area shows a list of key personnel. The first entry is 'Lindsay, Amanda Jane (Principal Investigator) (Certification Incomplete)', which is expanded with a red box around the dropdown arrow. Below this entry, there are several tabs: 'Details', 'Organization', 'Extended Details', 'Degrees', 'Unit Details', 'Person Training Details', and 'Certification'. The 'Certification' tab is highlighted with a red box, and a red arrow points to it from the right.

Use the radio buttons to complete the Certification. The last question will ask you to input your name and the date. Then, please select the **Save** button and the Certification should be complete.

The screenshot shows the 'Certification' tab for Amanda Jane Lindsay. The page title is 'Amanda Jane Lindsay (Principal Investigator) (Certification Incomplete)'. Below the title are tabs for 'Details', 'Organization', 'Extended Details', 'Degrees', 'Unit Details', 'Person Training Details', and 'Certification'. The 'Certification' tab is active. The page contains three questions, each with 'Yes' and 'No' radio button options. The first question asks about significant financial interests. The second question asks about remuneration exceeding \$10,000. The third question asks about reimbursement or sponsorship of travel. The final question asks for certification of compliance with university policies and for the user to provide their full name and the date of completion. The text input field for the name and date is pre-filled with 'Amanda Lindsay 8/22/2016'.

6. Next, please navigate to *Key Personnel > Credit Allocation* section to enter **Intellectual Contribution** and **Indirect Cost Distribution** allocations. The former drive how credit for the proposal and resulting award will be allocated and the latter informs parts of IDC recovery distribution for a resulting award. The IDC Distribution will generally be equal to the Intellectual Contribution – it varies only in rare instances.

100% credit must be split between investigators and then 100% of each investigator's credit should be split amongst his/her units. In the following example credit has been split 75/25 between Amanda and Diana. Amanda's portion has then been allocated 50/50 between Physics and Research & Sponsored Programs while 100% of Diana's portion has been allocated to Research & Sponsored Programs. (Most Investigators will only have one unit affiliation and so 100% of their credit will go to that unit.)

Credit Allocation			Refresh View
	Intellect.Contrib.	Indirect Cost Dist.	
Lindsay, Amanda Jane	75	75	
100165 - Physics	50	50	
100324 - VP, Research & Sponsored Programs	50	50	
Unit Total:	100	100	
Diana L. Skok	25	25	
100324 - VP, Research & Sponsored Programs	100	100	
Unit Total:	100	100	
Investigator Total:	100	100	

7. Next, please navigate to the *Questionnaire* screen and complete the **Proposal Questionnaire**. The answers you provide to questions may prompt a request for additional explanation. When you've completed all Questions, please select the Save button at the bottom of the page.

Proposal Development

Proposal: #4373
PI: *Lindsay, Amanda Jane*

Document Info
Doc Nbr: 26252
S2S Connected: yes
Initiator: alindsay
Status: In Progress
[more...](#)

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

Document was successfully saved.

Questionnaire

Proposal Questionnaire

Proposal Questionnaire (Incomplete) Clear Print

Does this proposal require access to KSU facilities, equipment or space beyond what is assigned to you currently or provided for in the budget? Or will alterations to existing space be needed? ⓘ

☒ Yes
☐ No

Please explain how you have provided for the additional facilities, equipment, or space or alterations to the existing. ⓘ

I will need additional lab sp

8. Finally, if the project is research, navigate to the *Supplemental Information* screen and select a **Research Designation** that best matches the type of research involved in this project.

- *Basic Research* – primarily to acquire new knowledge without any particular application or use in mind
- *Applied Research* – to gain knowledge or understanding to meet a specific, recognized need.
- *Development Research* - systematic use of knowledge gained from research directed toward the production of useful materials, devices, systems, or methods, including the design and development of prototypes and processes.

The screenshot shows the 'Supplemental Info' screen. On the left, a sidebar menu has 'Supplemental Information' highlighted with a red box. The main area shows a 'Research Designation' dropdown menu with 'Applied Research' selected, also highlighted with a red box and an arrow. A red arrow points from the 'Supplemental Information' menu item to the 'Applied Research' selection.

9. When you are finished, please scroll to the bottom of the page and select the **Close** button to exit the proposal record. This will keep the proposal from being locked.

The screenshot shows the bottom of the Kuali system page. At the bottom, there are four buttons: 'Back', 'Save', 'Save and Continue', and 'Close'. The 'Close' button is highlighted with a red box. Below the buttons is a blue footer bar containing copyright information and a URL.

If you have any questions, please contact Kent State's Kuali Help Team at kuali-research-help@kent.edu or 330-672-2070.