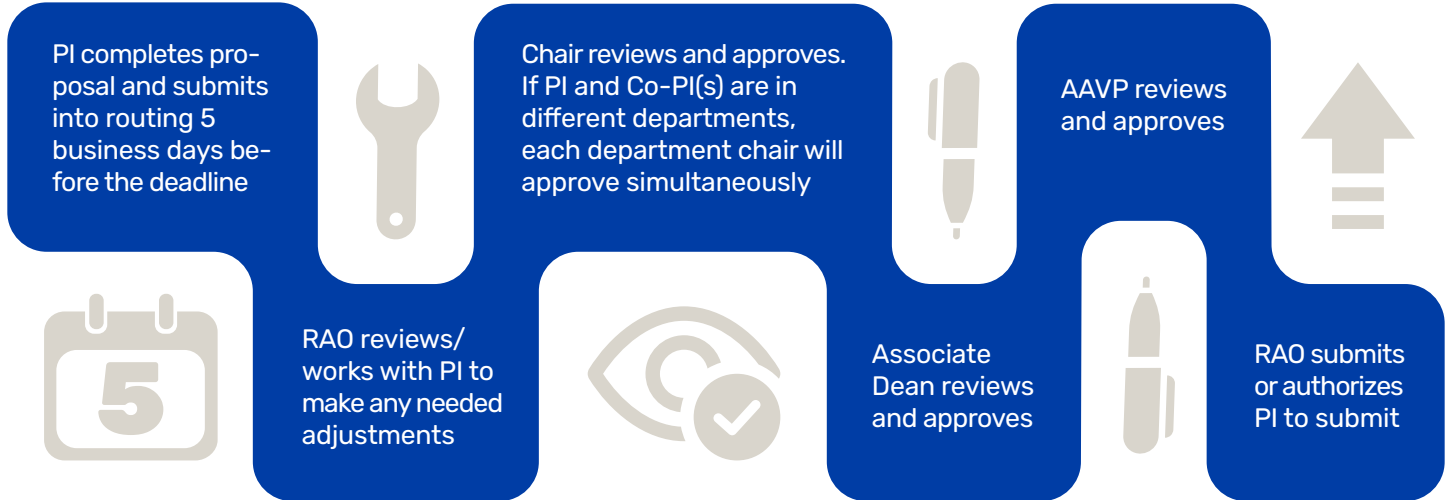


# APPROVING RESEARCH PROPOSALS VIA KUALI

## BYU ROUTING



## GENERAL GUIDELINES FOR APPROVERS

### Review the proposal while considering the following:

- Is the proposal aligned with the PI's research direction/goals?
- Is there significant student experience or education that is a product of this work?
- What is the level of usage of University resources (lab space, equipment usage, student time, faculty time)? Are the space, facilities and resources needed for the project available or will they be made available?
- Is this a project your department endorses and recommend that BYU endorses?

### Review all responses to the **BYU Questionnaire**, paying attention to the following:

- If **cost sharing** is committed, review the comments in the provide field and the total amount committed on the Budget tab of the Summary/Submit screen where you approve (see following screenshots).
- If there are **publication restrictions**, are they reasonable?
- If the project is **work for hire**, review the text in the Work for Hire question and discuss with the PI as needed.

#### Is COST SHARING or Matching required by Sponsor?

Do not budget for or commit to cost sharing unless it is required by Sponsor.



Yes

No

Provide an explanation below of the required dollar amount of cost sharing, describe how this will be fulfilled and which account number will be used.



20% Cost Share required by sponsor, this will be met by PI's time spent on the project during the academic year, estimated 1 month



- Basics
- Key Personnel
- Questionnaire
- Compliance
- Attachments
- Budget
- Access
- Supplemental Information
- Summary/Submit
- Notifications History

## Submit

Saved
Routing
Approved

Proposal Summary
Personnel
Questionnaire
Compliance
Attachments
Supplemental Info
Budget Summary

### Budget Summary

Cost Sharing Amount:	4,000.00	Underrecovery Amount:	4,120.00
Program Income:	0.00	F&A Rate Type:	MTDC

	P1(05/18/2024 - 05/17/2025)	Totals
Non-personnel		
> Travel	\$1,300.00	\$1,300.00
> Other Direct	\$6,700.00	\$6,700.00
Calculated Direct Costs	\$0.00	\$0.00

## 1. ACCESSING PROPOSALS

### A. Via Email Notification

Kuali Research Action - Proposal - APPROVE - PI: [REDACTED] - Due Date: 04/19/2024 - Lead Unit: 0991 - Sponsor:...

noreply=kuali.co@mx3.kuali.co on behalf of noreply@kuali.co  
 To: Debbie Silversmith

Fri 4/19/2024 11:54 AM

Please complete the APPROVE action for [REDACTED] in Proposal for "Veterans Research S"  
 Your timely action is requested.  
 Failure to act when an approval is requested will stop routing.



To review the requested action: [Document #38624](https://byures.kuali.co/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=38624&command=displayActionListView)  
<https://byures.kuali.co/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=38624&command=displayActionListView>

Or, to see all actions requested: [Action List](#)

### B. Via Kuali Research Dashboard (byures.kuali.co)

KUALI RESEARCH

- Dashboard Home
- Search
- Common Tasks
- All Links
- Reports
- Configuration

## Dashboard

Show/hide cards

#### Proposals routing to me

Sort by

You're up!
 Proposal #40 - PI: Researcher, Tom - Sponsor: National Science F...  
 Due date: 10/11/19 Last action: Larson, Gene; 9/03/19 11:25 AM

1 step away
 Proposal #31 - PI: Blotter, Jonathan - Sponsor: Alpha Tech Resear...  
 Due date: 6/30/19 Last action: Tree, Dale; 9/09/19 11:01 AM

1 step away
 Proposal #45 - PI: Burgon, Bruce - Sponsor: National Science Foun...  
 Due date: 9/10/19 Last action: Silversmith, Debbie; 7/16/19 2:27 PM

#### Proposals not routing

Sort by

Proposal #1 - PI: admin, admin - Sponsor: National Institutes of H...  
 Due date: None Last action: admin, admin; 2/20/19 9:03 AM

Proposal #3 - PI: admin, admin - Sponsor: National Institutes of H...  
 Due date: 2/28/19 Last action: admin, admin; 3/07/19 11:14 AM

Proposal #4 - PI: Silversmith, Debbie - Sponsor: National Science ...  
 Due date: None Last action: Nichols, David; 3/07/19 11:56 AM

Proposal #5 - PI: admin, admin - Sponsor: National Science Foun...

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## 2. REVIEWING PROPOSALS

The link will navigate to the Summary/Submit tab, with a summary of each proposal section across the summary screen (circled in the screenshot below). The following sections are available for review:

- Proposal Summary
- Attachments
- Budget Summary – pay attention to any proposed cost sharing
- Personnel
- Questionnaire
- Compliance
- Supplemental Info

## 3. APPROVE OR RETURN PROPOSALS

Once the proposal has been reviewed and is ready for approval, click on **Approve** at the bottom of the screen. Or, if a proposal needs revisions, click on **Return**. This will send the proposal back to the PI for further action.

*Note: The Approve button will remain at the bottom of the screen as you review information under each tab. You can approve from any tab.*

The screenshot shows a web interface for reviewing a proposal. On the left is a navigation menu with items like 'Basics', 'Key Personnel', 'Questionnaire', 'Compliance', 'Attachments', 'Budget', 'Access', 'Supplemental Information', 'Summary/Submit' (highlighted), 'Super User Actions', and 'Notifications History'. The main content area has a progress bar at the top with three stages: 'Saved' (green), 'Routing' (blue), and 'Approved' (grey). Below the progress bar is a horizontal tab bar with seven tabs: 'Proposal Summary' (circled in blue), 'Personnel', 'Questionnaire', 'Compliance', 'Attachments', 'Supplemental Info', and 'Budget Summary'. A large blue arrow points from the right towards the 'Proposal Summary' tab. Below the tabs is a 'Proposal Summary' section with a table of details for 'Veterans Research Supplement (VRS)'. At the bottom of this section are several buttons: 'Send Adhoc', 'Ad Hoc Recipients', 'Approve' (highlighted in blue), 'Return', 'View Route Log', 'Recall', 'Submit to Sponsor', 'More Actions', and 'Close'. Two blue arrows point upwards towards the 'Approve' button.

A comment box will open. Comments are **not** required for approvals. If **returning** the proposal, please add a comment/explanation. Click **OK**.

The screenshot shows a dialog box titled 'Please Select' with a close button (X) in the top right corner. The text inside asks, 'Are you sure you want to approve this document?'. Below this is a label 'Approval Comment:' followed by a text input field. Underneath is a label 'Attachment:' followed by a 'Choose File' button and the text 'No file chosen'. At the bottom of the dialog are two buttons: 'OK' (highlighted with a blue arrow) and 'Cancel'.

## TO VIEW ROUTE LOG OF PAST, CURRENT, & PENDING APPROVERS

Click on **View Route Log**.

*Actions Taken* denote past approvers/approvals.

*Pending Action Requests* denote current approvals pending PI/Chair/Dean action.

### Route Log

refresh

ID: 38624

▶ show

Actions Taken

▶ show

Pending Action Requests

▼ hide

Action	Requested Of	Time/Date	Annotation
▶ show <b>IN ACTION LIST APPROVE</b>	Silversmith, Debbie	09:47 AM 04/29/2024	Role: KC-PD Research Administration Contact from PeopleFlow Name: Research Administration Proposal Approval 1
▶ show <b>PENDING APPROVE</b>	Adams, Byron	09:47 AM 04/29/2024	Role: KC-PD Department Chair from PeopleFlow Name: BIO Proposal Approval
▶ show <b>PENDING APPROVE</b>	Stark, Michael	09:47 AM 04/29/2024	Role: KC-PD Associate Dean from PeopleFlow Name: BIO Proposal Approval
▶ show <b>PENDING APPROVE</b>	Howell, Larry	09:47 AM 04/29/2024	PeopleFlow Name: AAVP for Research Proposal Approval
▶ show <b>PENDING APPROVE</b>	Silversmith, Debbie	09:47 AM 04/29/2024	Role: KC-PD Research Administration Contact from PeopleFlow Name: Research Administration Proposal Approval 2