



Kuali Research: Investigator Certification Guide

Kuali Research Help Contact: kr-help@umd.edu

Last updated: 04/09/24

Reviewing the Proposal Before Certifying

Before certifying, you should review the proposal development record. You will need to navigate to the proposal itself in order to view the proposal.

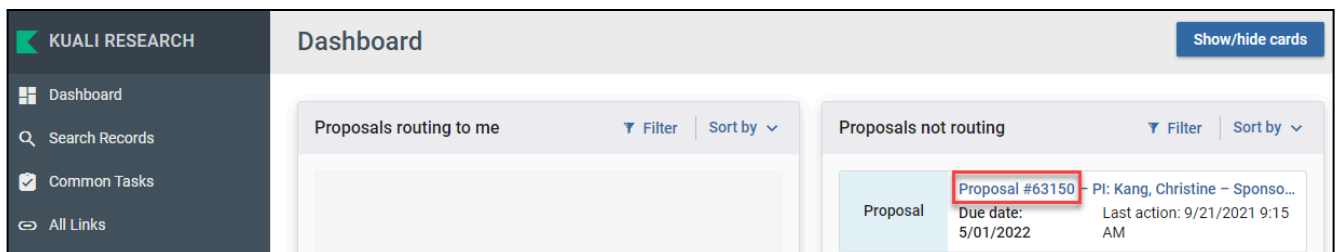
1. Open the email notification from Kualu Research with the subject line:
“Certification is required for Proposal: *[Title of the Proposal]*”
2. Copy the Proposal Number from the Certification email.

Please review the following proposal by clicking on Proposal Number. Please answer the certification questions if you agree to participate in this project.
Proposal Details as follows:
Document Number: 3717123
Proposal Number: 56959
Proposal Title: Advanced Computer Microchips
Principal Investigator: Sally Egloff
Lead Unit: 1301301 - CMNS-Institute for Advanced Computer Studies
Sponsor: 208497 - US Air Force
Deadline Date: 11/25/2020

3. Searching for your Proposal
You may find and open proposals in three ways:
 - 1.) Within Dashboard Cards
 - 2.) Search Records Page
 - 3.) Proposal Search in Commons Tasks

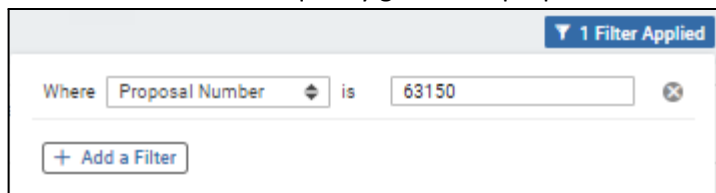
1.) Searching for Your Proposal within the Proposals Not Routing Dashboard Card

Noting the proposal number from the email, go to the Kualu Research Dashboard Homepage and find the proposal in your “Proposals Not Routing” card.



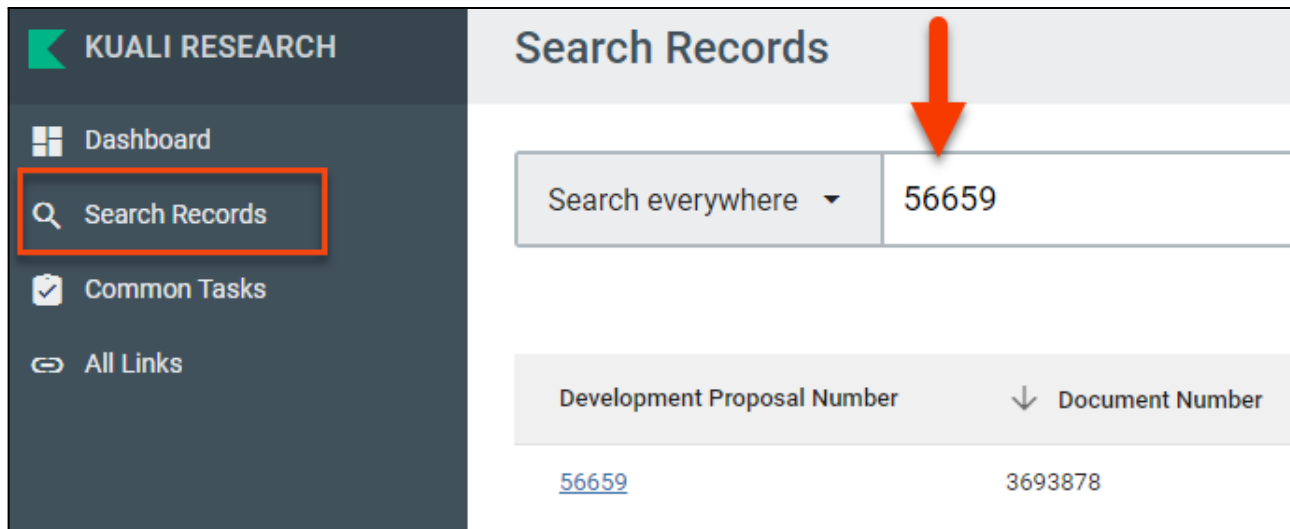
Filter

You can use the filter to quickly get to the proposal.



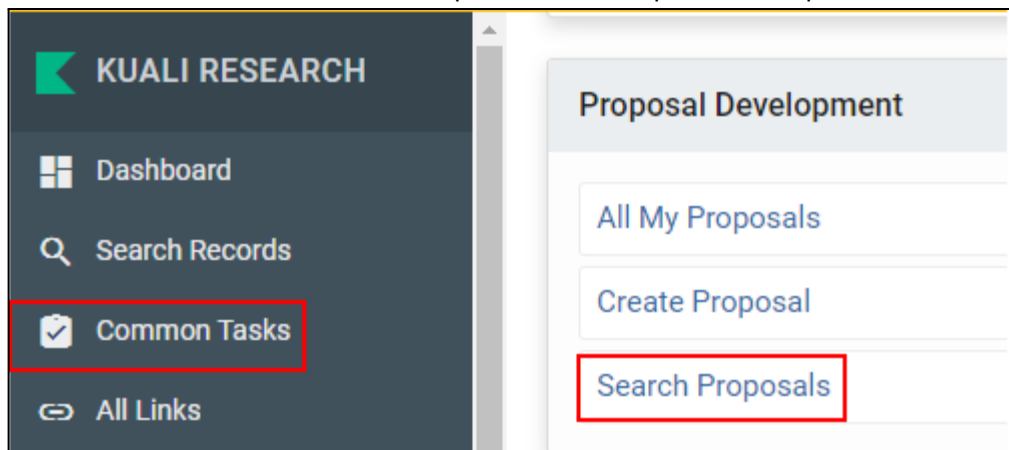
2.) Searching for your Proposal using the Search Records Page

You can search for Proposals by Proposal Number or Doc Number for example by using the Search Records page. If you are having trouble distinguishing the correct record you may narrow your results by searching within specific categories like "Development Proposal Number" or showing additional columns.



3.) Searching for your Proposal from the Common Tasks

Click Common Tasks > click Search Proposals under Proposal Development



This will open the Development Proposal Lookup screen. Type in your proposal number and press Enter.

Development Proposal Lookup

Proposal Number:

4. Once you have found your proposal, click on the Proposal.
This will bring up the Proposal Details screen.

Proposal Development

Proposal: #63150
PI: Christine Kang

Data Validation (off) Print

Proposal Details

* indicates required fields

- Basics
- Proposal Details
- S2S Opportunity
- Delivery Info
- Sponsor & Program Information
- Organization and Location
- Key Personnel
- Questionnaire
- Compliance
- Attachments
- Budget
- Access
- Supplemental Information
- Summary/Submit

Proposal Type: * New

Lead Unit: 1301301 - CMNS-Institute for Advanced Computer Studies

Activity Type: * Research - Basic

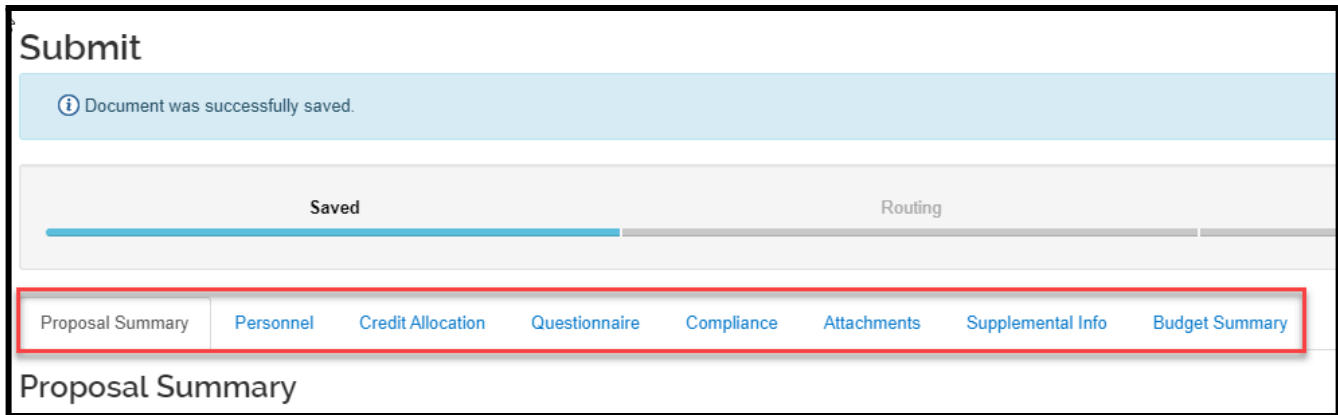
Project Dates: * 12/01/2022

Project Title: * test proposal

Sponsor: * 208497

Prime Sponsor Code:

The Summary/Submit section of the proposal allows you to quickly view the significant details of the proposal within the same section.



- **Proposal Summary Tab:** Basic details (Title, PI, Lead Unit, Prop #, Dates, Sub?, Sponsor, Deadline)
- **Personnel Tab:** All personnel listed on the project, their role, and their certification answers
- **Credit Allocation Tab:** DRIF/Credit Split allocation
- **Compliance Tab:** All Special Review items that apply to this proposal
- **Attachments Tab:** All Proposal, Personnel, and Internal attachments are available to be viewed
- **Questionnaires Tab:** All questionnaire questions and answers
- **Supplemental Info Tab:** Info such as Admin Costs, IDC Rate, Type, & Reason, Sponsor & Budget Contacts.
- **Budget Summary Tab:** Displays budget details by period and totals, personnel and non-personnel costs.

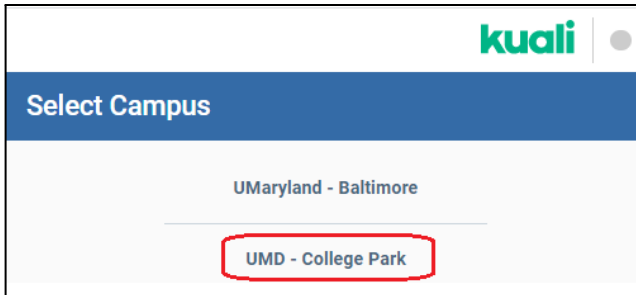
Click on Close to close out of the proposal and return to the Kualu Research Dashboard home screen. Go back to your Notification email.

Certification for the PI

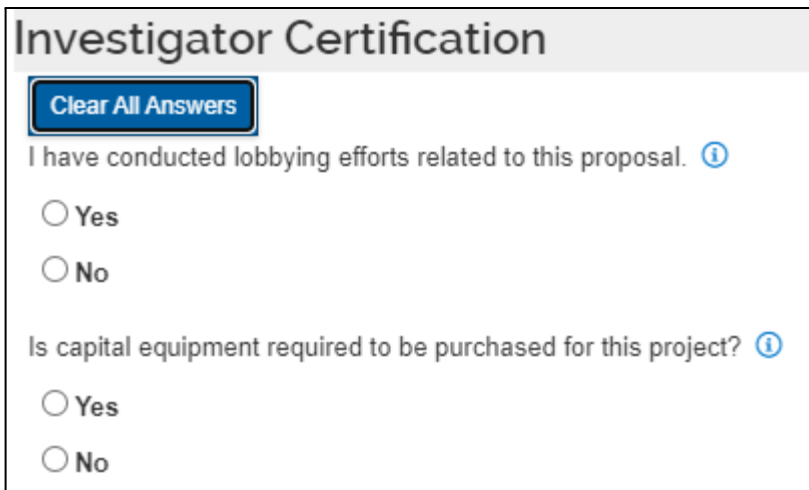
- 1.) On the Certification Request Email, click on the "Proposal Number" link.

Please review the following proposal by clicking on Proposal Number. Please answer the certification questions if you agree to participate in this project.
Proposal Details as follows:
Document Number: 3717123
Proposal Number: 56959
Proposal Title: Advanced Computer Microchips
Principal Investigator: Sally Egloff
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Deadline Date: 11/25/2020

- 2.) If you are not yet logged in, when the certification page opens, you will be prompted to do so. Click on UMD - College Park.



- 3.) Please answer ALL questions, then click the [Certify Answer] button. If you click on the [Cancel] button before clicking [Certify Answers], the system will not save your responses and will return you to the Kualo Research Dashboard home screen.

A screenshot of the 'Investigator Certification' form. At the top left is a blue button labeled 'Clear All Answers'. The first question is 'I have conducted lobbying efforts related to this proposal.' with an information icon. Below it are two radio button options: 'Yes' and 'No'. The second question is 'Is capital equipment required to be purchased for this project?' with an information icon. Below it are two radio button options: 'Yes' and 'No'.

Check Box Certifications

- All check boxes must be checked, or the certification will be considered incomplete.

Complete the check box to agree to the statement. (COI) ⓘ

I understand that I am required to disclose any COI as required by USM policies and procedures.

Complete the check box to agree to the statement. (disclosure) ⓘ

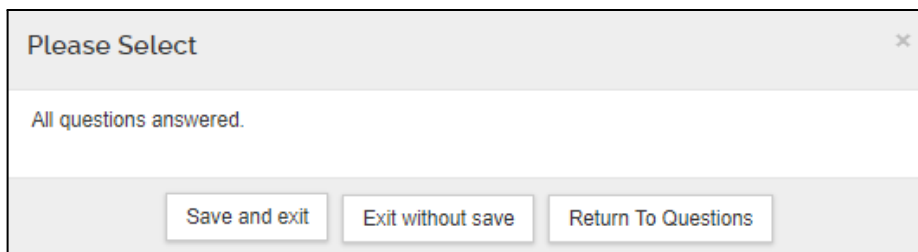
I have followed proposal/sponsor requirements in disclosing all professional activities including those performed within and outside of the University of Maryland (paid and unpaid), including foreign affiliations and/or support from other companies, universities, and government entities (eg. Talent programs; consulting activities). If you are unsure whether all disclosure requirements have been met please contact your ORA/SPA Contract Administrator.

Complete the check box to agree to the statement. (modifications) ⓘ

I agree to not make changes to the ORA/SPA-approved proposal without first notifying ORA/SPA.

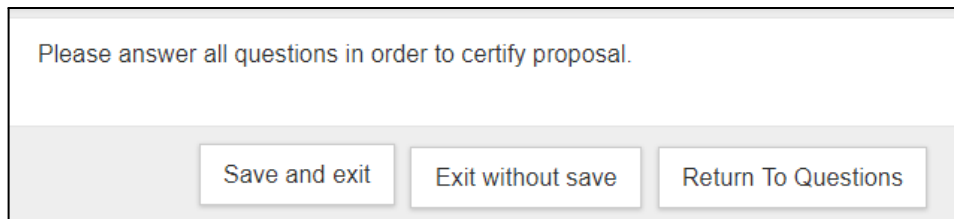
When you have answered all of the questions and click the [Certify Answers] button, a pop-up window will appear stating **“All questions answered”** and provide you with three options:

- **[Save and Exit]** This will save all of your answers and exit the questionnaire.
- **[Exit without save]** This will not save any of your answers and exit the questionnaire.
- **[Return To Questions]** This will return you back to the questionnaire.



If you did not answer all of the questions and click the [Certify Answers] button, you will see:

“Please answer all questions in order to certify proposal” to inform you that you have not finished. Click [Return to Questions] to finish answering the questionnaire. If you are not ready to finish, you may save your answers and come back to the questionnaire later by clicking on [Save and Exit]. You may return back to the questionnaire by clicking on the link in the certification email.



4.) Print Certification

You may print the certification once you are done. The investigator’s physical signature is NOT required/needed.

5.) Close Certification

- To close the Certification, you may close your browser by closing the browser window.
- Please do NOT click Cancel. This will cancel your certification answers.