kuali
RESEARCH

Kuali Research Basics Plus:
Proposal Development Viewing

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What is Proposal Development?

The Proposal Development module contains records of proposals that have been created for routing and submission. Data in the Proposal Development module are entered by users in the Department with the appropriate rights for a particular unit.

This module is open to certain campus users based on specific needs and is not available to general campus users as the data contained within this module may be sensitive or proprietary. Investigators listed on the proposal have access to view the record and certify the proposal. Departmental and College Approvers have access to view and approve the proposals.

Access to this module is provided at a unit level based on business needs. Data in this module may not be edited once the proposal has been submitted to the sponsor. No data in the Proposal Development module are included in the Data Warehouse and are not included in any institutional reports.

Viewing Proposal Development Records
You can access Proposal Development records by either performing a search or clicking on the Medusa tab within an Award, Institute Proposal, or Subaward record.

Searching in Proposal Development via the Common Tasks
If you've closed your proposal and need to re-open it, you may perform a search.
Click [Common Tasks] > click [Search Proposals] under the [Proposal Development]
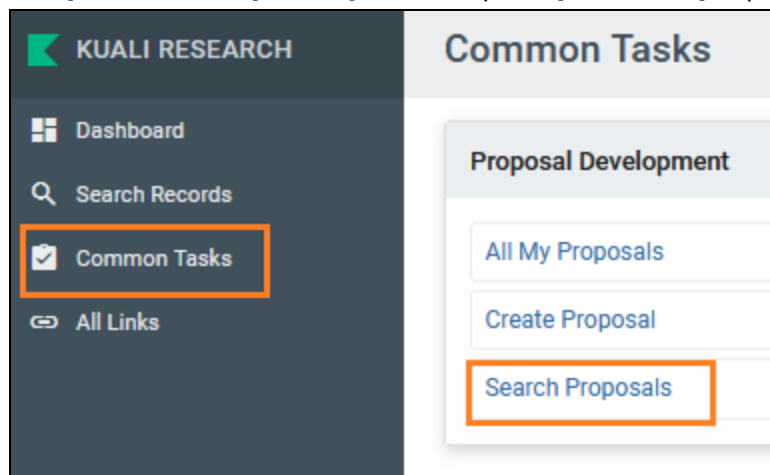
Searching for Proposal Development Records

There are multiple ways you can search and retrieve proposal development records using Search Proposals in Common Tasks, utilizing Medusa within any related record, referencing records presented in dashboard cards, or using the Search Records search page.

Proposal Search in Common Tasks

You have the option of directly searching for Proposal Development records. Using Kuali Research searching techniques, type in your search criteria and click on search. If you click on Cancel, the system will return you to the Welcome screen.

Proposal Number: internal tracking number for proposal
Proposal Type: type of proposal
Proposal State: routing/approval status
Project Title: title of proposal
Proposal Person: search by name of any Senior/Key Person listed on proposal
Principal Investigator: search by name of person with role of PI only
Aggregator: name of person who has rights to create/compile proposal
Participant: name of person who has access to the proposal
Initiator Username: directory ID of proposal creator
Sponsor Deadline Date: date proposal is due to sponsor
Sponsor: sponsor code
Sponsor Name: name of sponsor
Prime Sponsor Code: prime sponsor code
Prime Sponsor Name: name of the originating funding sponsor
Lead Unit: unit code of lead unit
Lead Unit Name: name of lead unit
Award ID: ID of award tied to this record, Renewals or Continuations only
Opportunity ID: funding opportunity ID
Hierarchy Status: not used at UM
Proposal Create Date: date range of when proposal was created (inclusive)
OSP Administrator Username: directory ID of ORA Contract Administrator

Basic searching rules: * is the wildcard character; click on the 🔍 to do a lookup for that particular field. A vertical bar character**|**may be used as an OR operator within each field that's not a pull-down.

If you are doing a broad proposal search, type in 1?????? for lead unit which will assure that all UMD proposals are included in the search results. There are some older UMD development proposals (2007-2015) that have UMCP as their lead unit. To include them in your broad search, type in UMCP|1??????.

Search will return a results list at the bottom of the Lookup screen. Click on view to open the selected proposal. **NOTE:** Search results will be limited based on the rights of the user. You will not be able to open proposal development records if you do not have the right to access proposals for that lead unit. The actions listed will be limited by the rights of the user and the status of the proposal.

Actions	Proposal Number	Proposal Document Number	Proposal Type	Proposal State	Project Title ⬍	Prev Grants.Gov Tracking ID	Opportunity ID	Opportunity Title ⬍	CFDA⬍ Number	Age Rou Iden
view medusa	35516	1870692	New	In Progress	Genetic Control of Mosquitoes- Applyingt Protein Prediction and Design to Create ts-Lethals for Genetic Sexingsporozoite vaccine manfacture			NIH Exploratory/Developmental Research Grant Program (Parent R21)		

Click "view" to open the Proposal Development record or click medusa to open the proposal on the Medusa tab, which shows shortcuts to all related records.

Opening Proposals from Medusa

Institutional Proposal 18061893			
▶ Award 029031-00001			
▶ Subaward 30193			
▶ Negotiation 28001			
▼ Development Proposal 39342			

[Open Proposal] [Open Proposal Notes]

Summary			
Proposal Number:	39342	Proposal State:	Approved and Submitted
Lead Unit:	1330501 : SPHL-Kinesiology	Research Dates:	01/01/2018 - 04/30/2019
Title:	Neuromuscular rehabilitation to improve function in older adults with PAD		
Proposal Type:	New	NSF Code:	Health Sciences - Life Sciences: D.03
Sponsor:	010942 NIH-National Institute on Aging	Prime Sponsor:	-
Sponsor Proposal Number:	-	Activity Type:	Research, applied
Program Title:	Change of Grantee Organization (Type 7 Parent)		
Notice of Opportunity:	Federal Solicitation	Program Number:	PA-16-285
Attachments:	None	Budget:	-

You may commonly find yourself within an Award, Institute Proposal, or Subaward while determining you'd like to view the associated Proposal Development Record. This can be done without doing a search from the Medusa tab.

In Medusa, click on the Development Proposal link to view the summary information, then click on the "Open Proposal" button to open that record in another web browser tab.

Opening Proposals from Dashboard

You may find the proposal you are looking for in various dashboard cards. Depending on your role, some of these cards may have records displayed that you can directly open for review.

Proposals Routing to Me Card
This card allows Proposal Development Approvers to easily monitor proposals that are queued up for their approval and watch for proposals they will soon have to approve. If you are not an approver, this card will be empty. To open a record, click on any proposal you wish to view.

Proposal Not Routing Card

This card allows the Proposal viewer to monitor which proposals have been created and not yet submitted for approval. To open a record, click on any proposal you wish to view.

Proposal Workload Card

This card allows anyone with Proposal view access to see which proposals are still currently in the process of being approved across all routing stops. When viewing the "Current Request(s)" column, you can observe who the current primary approver is (e.g., Chair, Dean, ORA Representative). The "Assigned Approver" field will always be blank. Once a proposal has been completely approved, it will be removed from this card. If a proposal is recalled or returned, it will also be removed from the card until it gets routed for approval again.

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.

Reviewing Proposal Summary Information

If you want to quickly and easily access important proposal information, navigate to the proposal's Summary/Submit section (bottom left of Proposal Sections). This section organizes important proposal information across tabs that are easy to navigate and review.

Summary/Submit Section

Each tab shows the summary information for that topic (sections). The Route Log shows the routing history including approvals.

Proposal Summary Tab

The Proposal Summary tab provides core, identifiable information.

Proposal Summary	Personnel	Credit Allocation	Questionnaire	Compliance	Attachments	Supplemental Info	Budget Summary

Proposal Summary

Title	test proposal
Principal Investigator	Christine Kang
Lead Unit	1301301 - CMNS-Institute for Advanced Computer Studies
Proposal Type	New
Activity Type	Research - Basic
Proposal Number	63150
Project Start Date	12/01/2022
Project End Date	11/30/2024
Include Subaward(s)?	No
Sponsor Name	US Air Force
Prime Sponsor Name	
Sponsor Deadline Date	05/01/2022
Sponsor Deadline Type	Receipt

Personnel Tab

The Personnel Tab shows investigators listed on a proposal, what their role is, and provides links to quickly see how investigators answered certification questions.

Proposal Summary	Personnel	Credit Allocation	Questionnaire	Compliance	Attachments	Supplemental Info	Budget Summary

Personnel

Key Person	Role	Unit	Proposal Person Certification
Christine Kang	Principal Investigator	(Lead Unit) 1301301 - CMNS-Institute for Advanced Computer Studies	complete (view)
Sally Egloff	Co-I (UMB Routing Req'd)	1301301 - CMNS-Institute for Advanced Computer Studies	incomplete (view)

Co-I (UMB Routing Req'd) is a Co-investigator. Please ignore the (UMB Routing Req'd) for UMD, College Park Users.

Credit Allocation Tab

The Credit Allocation tab lists how the credit split has been allocated to each investigator across all associated units.

Credit Allocation	Recognition
Mosi A Skerritt	75
1281501 - BSOS-Geography	100
1420103 - VPR-Research Administration	0
Unit Total:	100
Sally Egloff	25
1420103 - VPR-Research Administration	100
Unit Total:	100
Investigator Total:	100

Compliance Tab

The Compliance Tab will list any Special Review considerations for the proposal and their status. If applicable, other information such as a protocol number, application date, or approval date may also be listed.

Compliance				
Type	**Approval Status**	**Protocol Number**	**Application Date**	**Comments**
Human Subjects	Pending			

Attachments Tab

The Attachment Tab contains collections of all of the attachments in the proposal.

Attachments

Proposal (5) Personnel (2) Abstracts (0) Internal (3) Notes (0)

Proposal (5)
Add attachments to this proposal

	File	Type *	Status	Description	Uploaded By	Posted Timestamp
1	facilities.pdf	Facilities	Final		Kang, Christine	04/05/2019 07:49 AM
2	equipment.pdf	Equipment	Final		Kang, Christine	04/05/2019 07:49 AM
3	abstract.pdf	ProjectSummary	Draft		Kang, Christine	04/05/2019 07:49 AM
4	bibliography.pdf	Bibliography	Final		Kang, Christine	04/05/2019 07:49 AM
5	narrative.pdf	Narrative	Draft		Kang, Christine	04/05/2019 07:49 AM

- The Proposal Tab is used only for S2S proposals and contains any attachments for submittal to the sponsor.
- The Personnel Tab is used only for S2S proposals and contains investigator-specific attachments such as Current and Pending Reports and Biosketches.
- The Abstract Tab is not used by UMD and will not contain any information.
- The Internal Tab lists all attachments a department would like to retain but not submit directly to the sponsor(Only for S2S), for example, the departmental budget spreadsheet, funding opportunity instructions, departmental routing memo. For the non-S2S proposals, ALL documents will be attached on this tab.
- The Notes Tab is not used by UMD and will not contain any information.

Questionnaire Tab

The questionnaire tab allows you to review all questionnaire answers. Depending on the type of proposal, you may see different questionnaires displayed in this section for funded agreements, non-funded agreements, or system-to-system proposals.

Supplemental Info Tab

The Supplemental Info Tab displays more proposal-specific info for Admin Costs designation, IDC Rate, Type, and Reason, and NSPIRES USERNAME.

Budget Summary Tab

The Budget Summary Tab displays the F&A Rate Type, budgeted costs by category and totals for both direct and indirect costs.

Budget Summary

	Cost Sharing Amount:	40,310.40		Underrecovery Amount:	312.00	
	Program Income:	400.00		F&A Rate Type:	MTDC-On or Off-Adjacent	

	P1(01/01/2018 - 12/31/2018)	P2(01/01/2019 - 12/31/2019)	Totals
Personnel			
> Salary	$58,750.00	$61,100.00	$119,850.00
> Fringe	$17,625.00	$18,330.00	$35,955.00
Calculated Direct Costs	$0.00	$0.00	$0.00
Personnel Subtotal	$76,375.00	$79,430.00	$155,805.00
Non-personnel			
> Equipment	$5,000.00	$5,200.00	$10,200.00
> Travel	$2,000.00	$2,080.00	$4,080.00
> Other Direct	$600.00	$624.00	$1,224.00
Calculated Direct Costs	$0.00	$0.00	$0.00
Non-personnel Subtotal	$7,600.00	$7,904.00	$15,504.00
Totals			
Total Direct Cost	$83,975.00	$87,334.00	$171,309.00
Total F&A Costs	$40,755.00	$42,709.68	$83,464.68
Totals Subtotal	$124,730.00	$130,043.68	$254,773.68

F&A Rate subsection

This F&A Rates subsection shows the default institutional rate and applicable rates for this proposal.

F&A Rates

Description	On Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate
MTDC	No	2019	07/01/2018	27.50	3.00
MTDC	Yes	2019	07/01/2018	54.50	5.00
MTDC	No	2020	07/01/2019	27.50	3.00
MTDC	Yes	2020	07/01/2019	54.50	5.00
MTDC	No	2021	07/01/2020	27.50	3.00
MTDC	Yes	2021	07/01/2020	54.50	5.00

Description: describes the type of rate being used

On Campus: if yes, rate is for campus, if no, rate is for off-campus

Fiscal year: fiscal year of the period

Start Date: start date of the fiscal year

Institute Rate: formally negotiated rate for UMD

Applicable Rate: rate that is used for this proposal

Route Log

Clicking on the "View Route Log" link at the bottom of the Summary section will allow you to review who approved the proposal and when. NOTE: Past proposals that were migrated from Coeus will be missing this information. If you find you require this information, please contact kr-help@umd.edu.

Viewing All Proposal Details

If you cannot find the information you need from the Summary/Submit section, you may individually view all segments of a proposal if necessary. Upon opening a proposal, the Proposal Details screen is displayed. There are three parts of the screen: the Reference Information Box, the Proposal Sections Side Menu, and the Proposal Toolbar.

Reference Information Box

Shows information about the document for this version of the Proposal Development record.

S2S Connected: did/will this proposal be submitted directly to Grants.gov?

Initiator: user ID of proposal creator

Status: status of the proposal - In Progress: not yet routed; Approval Pending: proposal is being routed

Document Info
Doc Nbr: 1850646
S2S Connected: no
Initiator: ssimmon1
Status: Approved and Submitted
more...

Document Info
Doc Nbr: 1867241
S2S Connected: yes
Initiator: dgriffi1
Status: Approved and Submitted
more...

You can click on more... to see more information about the document.

Document Info

Doc Nbr	2220938
Initiator	admin
Status	In Progress
PI	Mosi A Skerritt
Created	11:14 AM 08/02/2017
Updated	2017-08-02 11:14:40.0
Proposal Nbr	37212
Copied from Document Id	2220450
Sponsor Name	NSF

This contains more reference detail information for this development proposal.

Doc Nbr: internal tracking number for this document

Initiator: directory ID of person who created the proposal

Status: current status of the proposal

PI: name of PI assigned to the proposal

Created: date and time proposal was created

Updated: date and time proposal was last updated

Proposal Nbr: internal tracking number for this proposal (note no leading zeros)

Sponsor Name: name of sponsor that this proposal will be/was submitted to

Click anywhere off the panel to close it.

Proposal Sections Menu

The proposal sections are listed on the left with the subsections under them.

The highlighted proposal section is what is being displayed in the main proposal window.
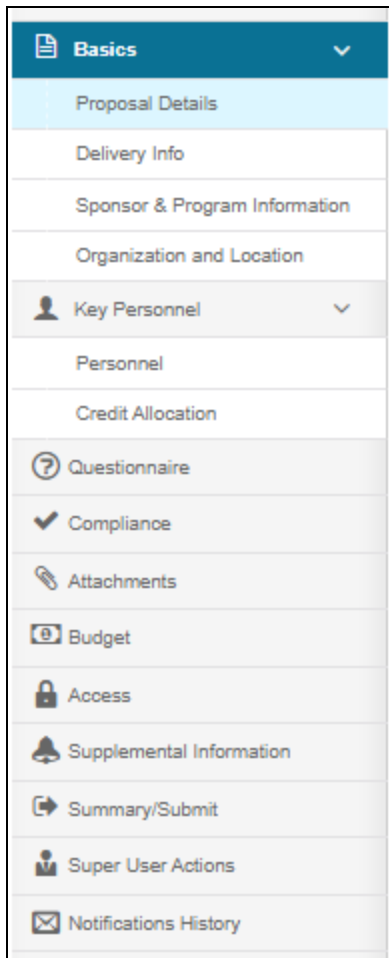
If a proposal section has a > on the right, it indicates that there are subsections under the section. You can click on the > to expand to see the subsection labels.

If the [⌄] is shown, then the subsection labels are displayed. You can click on the [⌄] to close the subsection label display.

Proposal Toolbar

Additional information available to be viewed about the proposal is listed across the top of the screen.
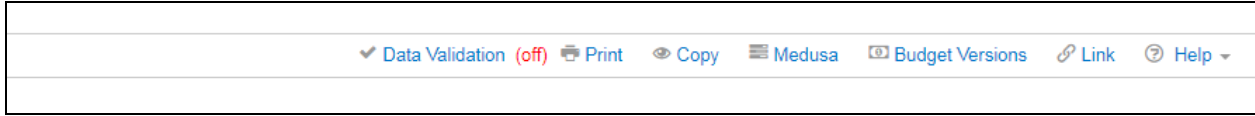
Data Validation: Turn on/run Budget specific validations, located at the top of the navigation bar.
Print: Displays and selects the printable materials
Copy: Able to make a copy of this as a new proposal (must have proposal creation rights)
Medusa: Opens the Medusa Window – Award, Institute Proposal, Subcontract, and Development proposal links to show the relationship among them. Allows one to move from one module to the next without opening each separate module
Budget Versions: Displays all budget versions. Allows create, finalize, and include the budget version of the user's choice for the proposal
Link: Displays the proposal link
Help: displays the guidebook

Print
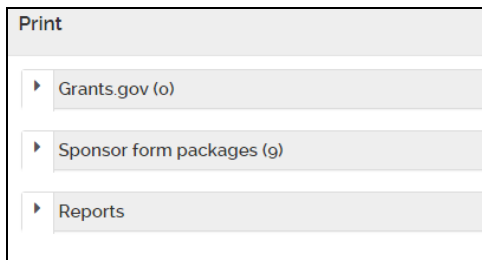
The function allows you to print various parts of the proposal. The Grants.gov will print the grants.gov forms for this proposal. The Sponsor form packages will print generic forms. Reports are not used at UMD.

Once you've expanded the desired section, click on the checkbox under Select for each form you want to print. Ignore the Include dropdown.
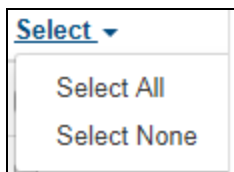
   You can click on **Select** to select all or none.

When done, click on Create PDF to generate a combined document.

Basics Section
Proposal Details Subsection

Proposal Details

*indicates required fields

Proposal Type:	New	
Lead Unit:	1420101 - VPR-VP Research	
Activity Type:	Research - Basic	
Project Dates:	07/01/2019	06/30/2021
Project Title:	CMK_DO NOT SUBMIT	
Sponsor:	205619 - Naval Air Systems Command	
Prime Sponsor Code:		
Keywords:		

Proposal type: type of proposal submission

> **New**: An application is submitted for funding for the first time.
>
> **Continuation**: A non-competing application for additional funding within the previously approved funding period.
>
> **Pre proposal**: a pre-proposal submission as defined by sponsor
>
> **Renewal**: (formerly called competing continuation) – Previous years of funding for the project have elapsed. Competing for additional funding to continue project
>
> **Resubmission**: (formerly called revision or amended application) – Application previously submitted and reviewed by sponsor but not funded. Used for System-to-System applications only.
>
> **Revision**: (formerly called supplement for NIH) – An application that proposes a significant change in an existing award; change in scope of work, etc

Lead unit - unit number and name of lead unit

Activity type: type of activity that will be performed by this proposal

- **Research - Basic:** systematic study directed toward fuller knowledge or understanding of the fundamental aspects of phenomena and of observable facts without specific applications towards processes or products in mind.
- **Research - Applied:** research assessing and using some part of accumulated theories, knowledge, methods, and techniques for a specific driven purpose.
- **Research - Development:** systematic application of knowledge or understanding, directed toward the production of useful materials, devices, and systems or methods including design, development, and improvement of prototype and new processes to meet specific requirements.
- **Clinical Trial:** research studying the effectiveness of a particular device/therapy/drug with humans.
- **Training/Instruction:** projects, which incorporate mainly teaching.
- **Fellowship:** projects which provide a stipend to faculty or students in support of their undirected research or advanced study.

- **IPA:** Intergovernmental Personnel Assignments of personnel on temporary assignment to federal agencies.
- **Services/Other Sponsored Activities:** projects, which involve the performance of work other than instruction/training and research. Examples of such projects are health and community service projects.

Project Dates: planned begin and end dates of project

Project Title: title of project. This is limited to 200 characters for Grants.gov proposals, and some sponsors require shorter titles

Sponsor: code and name of sponsor

Prime Sponsor Code: code and name of prime sponsor, blank if none

Keywords: not used at UMD

S2S Opportunity Search Subsection

If the proposal is an S2S proposal, the S2S Opportunity information is viewable here.

Opportunity Tab

Opportunity ID: Grants.gov ID assigned to the opportunity

Opportunity Title: title of opportunity, assigned by sponsor

Submission Type: type of submission

S2S Revision Type: used if the proposal is an S2S revision

Competition ID: ID assigned by agency

Opening Date: date opportunity was opened

Closing Date: date opportunity closes

Instruction Page: link to the instructions for this opportunity

Schema URL: URL to view schema

S2S Provider: Grants.gov

Assistance Listings Number: ALN (formerly CFDA) assigned by agency

Forms Tab

Forms			
Form Name	**Mandatory**	**Include ▾**	**Description**
AFRI_Project_Type	No	No	Unavailable
Attachments_1_2V1_2	No	☑	Available
HHS_CheckList_2_1-V2.1	No	No	Unavailable
HRSA_AENT	No	☑	User Attached Form
HRSA_NFLP	No	No	Unavailable
Key_Contacts	No	No	Unavailable
NASA_SeniorKeyPersonSupplementalDataSheet-V1.0	No	☐	Available
NSF_CoverPage_1_7-V1.7	No	☐	Available
NSF_SuggestedReviewers-V1.1	No	☐	Available
RRSF424_SF424B-V1.1	No	☐	Available
RR_Budget_1_4	No	☑	Available
RR_SF424_2_0-V2.0	Yes	Yes	Available
RR_SubawardBudget10_10_1_4	No	☐	Available
RR_SubawardBudget10_30_1_4	No	☐	Available
RR_SubawardBudget30_1_4	No	☐	Available

Based on the opportunity for this proposal, this screen shows the forms that have been selected for the proposal.

Form Name: name of form
Mandatory: Yes-mandatory, No-optional
Include: ignore in view mode
Description: description of the content of the form

Submission Detail Tab

Opportunity	Forms	Submission Detail	User Attached

Submission Detail

Submission details will be available after the proposal is submitted.

If the proposal has been submitted to grants.gov, the submission detail is shown here.

User Attached Forms Tab

Description	Namespace	Form Name	File Name	Actions
HERA	http://apply.grants.gov/forms/HRSA_AENT-V1.0	HRSA_AENT	HRSA_AENT_complete.pdf	Action▾

If there are any user attached forms, they are listed here.
Description: Short description of the form
Namespace: location of the form in grants.gov
Form Name: formal name of form
File Name: name of the file that contains the form
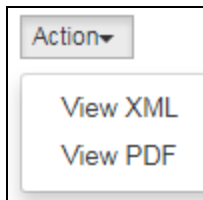
The actions pulldown allows you to view the forms in the file format listed for that form.

Delivery Info Subsection

Contains information about how the proposal is/was delivered.
Submission by: which unit will submit the proposal, almost always OSP (ORA)
Submission Type: method to be used for submission
Submission Account ID/Submission Name & Address, and Number of Copies: not used at UMD
Submission description: contains Federal submission system if used

Sponsor & Program Information Subsection

Sponsor & Program Information

Sponsor Deadline Type:	Receipt
Sponsor deadline:	06/21/2023 5:00 PM
Notice of Opportunity:	Unsolicited
Opportunity ID:	
Opportunity Title:	
Subawards:	false
Sponsor Proposal ID:	
NSF Science Code:	Geological and Earth Sciences - Geosciences, Atmospheric, and Ocean Sciences: C.02
Anticipated Award Type:	Grant
Agency Routing Identifier:	
Prev Grants.Gov Tracking ID:	

▼ ALN

Assistance Listing Number	ALN Program Title Name
43.001	Science

Contains proposal submission information related to the sponsor and program.

Sponsor Deadline Type: receipt or electronic submission

Sponsor deadline: the deadline for the opportunity that this proposal is responding to

Notice of opportunity: type of opportunity that this proposal is responding to

Opportunity ID: ID of opportunity that this proposal is responding to

Opportunity Title: title of opportunity

Subawards: true - there is at least one subaward for this proposal; false - no subawards

Sponsor Proposal ID: proposal ID assigned by sponsor

NSF Science Code: science category based on NSF science codes

Anticipated Award Type: type of award PI anticipates will be if awarded

Agency Routing Identifier: complete if directed to do so in FOA

Prev Grants.Gov Tracking ID: complete if directed to do so in FOA

Assistance Listings Number: for federal submissions, the number identified by the funding opportunity

Organization and Locations Subsection

Organizations & Locations

| Applicant Organization | Performing Organization | Performance Site Locations | Other Organizations |

Applicant Organization Tab

University of Maryland information

Applicant Organization
421583
000001

Organization Name	University of Maryland
Address Line 1	Office of Research Administration
Address Line 2	3112 Lee Building 7809 Regents Drive
Address Line 3	
City	College Park
State	MD
Postal Code	20742-5141

Performing Organization Tab

University of Maryland information

Performing Organization
32885
000001

Organization Name	University of Maryland
Address Line 1	Office of Sponsored Programs
Address Line 2	3112 Lee Building
Address Line 3	
City	College Park
State	MD
Postal Code	20742-5141

Performance Site Locations Tab
If there are any off-campus performance sites for three consecutive months OR field work locations, they will be shown here.

Performance Site Locations

Organization:	Deep Creek Lake
City:	McHenry
State:	
Address Line 1:	Route 212
Address Line 2:	
Postal Code:	

Other Organizations Tab
If there are any subawardees planned for this proposal, they are shown here.

Other Organizations

Organization Name:	Yale University
Contact Address Id:	Office of Sponsored Programs
Contact Address Line2:	155 Whitney Ave.-Room 214
Contact Address Line3:	
Contact Address city:	New Haven
Country Code:	USA

▸ CT-003

You can click on the Organization Name to see more detail about the organization.

Key Personnel Section

Personnel Subsection

Key Personnel

Search for and add key personnel

▶ Christine Kang (Principal Investigator) (Certification Completed and Answered By ckang1 - 04/05/2019 07:34 AM)

Contains the name, type, and certification completion information for each proposal person. When you click on the ▶ line, the Personnel Subsection will be displayed for that person.

Details Tab

▼ Christine Kang (Principal Investigator) (Certification Completed and Answered By ckang1 - 04/05/2019 07:34 AM)

| Details | Organization | Extended Details | Degrees | Unit Details | Person Training Details | Investigator Certification |

Details

Proposal Person Role Id:	Principal Investigator		
Full Name:	Christine Kang	**User Name:**	ckang1
First Name:	Christine	**Last Name:**	Kang
Middle Name:		**eRA Commons User Name:**	cmkang1
NSF ID:		**Include In Credit Allocation:**	true

Proposal Personal Role ID: role assigned to this proposal person
Full Name: full name of proposal person
First Name: first name of proposal person
Last Name: last name of proposal person
Middle Name: middle name/initial of proposal person
eRA Commons User Name: NIH Commons ID
Include in Credit Allocation: true - person is included in DRIF credit allocation, false - person is not included

Organization Tab

Address and unit information for the proposal person. Information comes from PHR.
Effort: not used at UMD

Extended Details Tab

KC Person ID: university ID of key personnel
Directory Department: primary department of proposal person from PHY
Remainder of items: not used at UMD

Degree Tab
Not used at UMD

Unit Details Tab

		Unit Number	Lead Unit?
Unit Details			
Show 10 ▾ entries			
BSOS-Geography		1281501	Lead Unit - Cannot delete
Showing 1 to 1 of 1 entries			

Displays the unit that the key personnel is associated with. You can click on the unit number to view more detail about the unit.

Person Training Details Tab
Not used at UMD

Certification Tab

Investigator Certification

Clear All Answers

I have conducted lobbying efforts related to this proposal. ⓘ

No

Is capital equipment required to be purchased for this project? ⓘ

No

Is this proposal to a sponsor/prime which requires COI disclosure, including FCOI, to be completed before the proposal submission even if there is nothing to disclose? ⓘ

No

Is this proposal to be submitted to a sponsor, either directly or as a subawardee to a Prime Sponsor, which has public access or open-source requirements (data or software) or specific data management/sharing requirements that would normally require a waiver of the University of Maryland Intellectual Property policy? ⓘ

No

I have a real or potential conflict of interest related to this work or sponsor, as defined by the University System of Maryland Policy (III-1.11). ⓘ

No

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.

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

I am aware that any false, fictitious, fraudulent, and/or plagiarized statements may subject me to criminal, civil, and/or administrative penalties.

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

I accept responsibility for the financial and scientific conduct of this project and will provide all required reports if the proposal results in a project/award.

Complete the check box to agree to the statement. (authorized official) ⓘ

I understand that ORA/SPA is the authorized University negotiator and signatory on behalf of the University. Investigators are not authorized to negotiate or sign on behalf of the University.

Show answers provided by the PI to certification questions. You can scroll through to see all of the questions and answers.

Credit Allocation Subsection

	Recognition
Carlos Edibaldo Silva	75
1281501 - BSOS-Geography	100
Unit Total:	100
David Paul Roy	25
1281501 - BSOS-Geography	100
Unit Total:	100
Investigator Total:	100

The Combined Credit Split Panel shows how the DRIF credit split is allocated per PI and department. Each Unit Total will equal 100 - the percent entries for individual units assigned to the PI must add up to 100. The Project Persons Total will equal 100 - the percent entries listed with each Investigator's name must add up to 100. If all fields are zeroes, the Credit Split information has not been entered.

Compliance Section

Compliance

▶ Human Subjects Approval not required

▶ Biological Materials Pending

▶ Animal Subjects Approval not required

The Compliance section lists special review items for this proposal. Special review items include: Human Subjects, Animal Subjects, Use of Chemicals, Use of Radioactive Materials, Export Control, Conflict of Interest, Financial Conflict of Interest, etc.

Attachments Section

Attachments are split into a number of tabs.

The **Proposal Tab** is used only for S2S proposals and contains any attachments for submission to the sponsor.

The **Personnel Tab** is used only for S2S proposals and contains investigator-specific attachments such as Current and Pending Reports and Biosketches.

The **Abstract Tab** is not used by UMD and will not contain any information.

The **Internal Tab** lists all attachments a department would like to retain but not submit directly to the sponsor (Only for S2S), for example, the departmental budget spreadsheet, funding opportunity instructions, departmental routing memo. For the non-S2S proposals, ALL documents will be attached on this tab.

The **Notes Tab** is not used by UMD and will not contain any information.

Within each tab, click on the pdf file name to view the attachment.

Proposal Tab (S2S ONLY)

Proposal attachments that will be sent to the sponsor.

File: name of uploaded file, click on it to view

Type: description of type of file

Status: status of completion; either Final or Draft

Description: description of contents of file

Updated By: directory ID of person who last uploaded the file

Posted Timestamp: date and time the file was last uploaded

Personnel Tab (S2S ONLY)

Attachments related to the personnel assigned to the proposal

	File	Person	Type	Description	Uploaded By	Posted Timestamp
	Proposal (1)	Personnel (2)	Abstracts (0)	Internal (0)	Notes (0)	

Personnel (2)

Add attachments to this proposal

	File	Person	Type	Description	Uploaded By	Posted Timestamp
1	bio_pi.pdf	Carlos Edibaldo Silva	Biosketch	Silvabiosketch	admin, admin	07/28/2017 12:12 PM
2	current_pending_PI.pdf	Carlos Edibaldo Silva	Currentpending	Silvacurrentandpending	admin, admin	07/28/2017 12:12 PM

File: name of uploaded file, click on it to view
Person: proposal person for this file
Type: description of type of file
Description: description of contents of file
Updated By: directory ID of person who last uploaded the file
Posted Timestamp: date and time the file was last uploaded

Internal Tab

Internal contains attachments that are for UMD use only.

	Proposal (5)	Personnel (2)	Abstracts (0)	Internal (3)	Notes (0)

Internal (3)

	File	Type *	Status	Description	Uploaded By	Posted Timestamp
1	Placeholder.pdf	UM - ORA/SPA Placeholder	Draft		Kang, Christine	04/02/2019 06:11 AM
2	Placeholder2.pdf	UM - Departmental Budget	Final		Kang, Christine	04/02/2019 06:11 AM
3	placeholder_to_replace.docx	UM - ORA/SPA Placeholder	Draft		Kang, Christine	04/02/2019 06:11 AM

File: name of uploaded file, click on it to view
Type: description of type of file
Status: status of completion; either Final or Draft
Description: description of contents of file
Updated By: directory ID of person who last uploaded the file
Posted Timestamp: date and time the file was last uploaded

Questionnaire Section

Questionnaire displays the set of questions completed. The questionnaires required to be completed for Proposal Development depend on the anticipated award type and if the proposal will be submitted system to system.
You can scroll through to view the questions and answers.

Budget Section

Contains details on the budget.

Summary budgets are required for all proposals. Detailed budgets are required for S2S proposals. All proposals will have a Departmental Budget attached in the Attachments section.

Summary Budget Panel

This shows the summary budget information. Only one budget can be marked as For Submission. Click on the name of the budget to see the budget details.
Name: name assigned at the time the budget is created
Version: the version of this budget
Direct Cost: total direct cost requested
F&A: total F&A requested
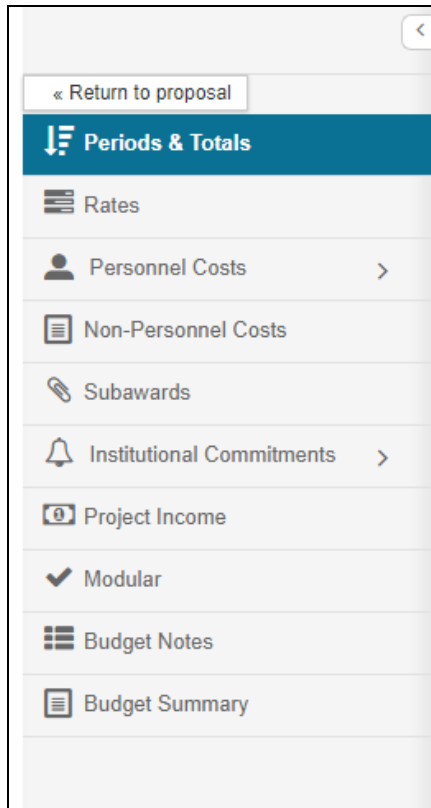**Total**: direct and F&A summed together
Start: proposed start date for this project
End: proposed end date for this project
Status: status of the budget
Comments: any comments typed in by the budget creator for this budget

Budget Details

When you click on the name of the budget, the system will display the detailed budget sections on the left of the screen. You can click on Return to proposal (upper left) to return to the proposal detail.

You can click on each section to see the detail of that section. If the section label has a > on the right, it means there are subsections in that section.

Periods and Totals Section

Displays the period totals for the budget.

Period Start Date: Proposed start date for this period

Period End Date: proposed end date for this period

Months: proposed duration in months for this period

Total Sponsor Cost: total amount requested from the sponsor for this period

Direct Cost: proposed direct cost for this period

F&A Cost: proposed F&A cost for this period

Unrecovered F&A: unrecovered F&A for this period

Cost Sharing: UMD share of the cost for this period

Cost Limit: if entered, the amount the request is limited to

Direct Cost Limit: if entered, the amount the direct cost is limited to

Rates Section

The Rates section displays the rates that are available for use in this budget. You can click on each tab to see the available rates for that item.

Rates

Verify the default rates set by your institution. You can override them if necessary by clicking the edit icon to the right of each row.

Research, basic F & A	Fringe Benefits	Inflation

Institute Rate: formally negotiated rate for UMD
Applicable Rate: rate that is used for this proposal

Research, basic F&A Tab - Shows the rates that are available to be used for this proposal.

Research - Basic F & A   Sync to Current Institutional Rates   Reset to Default Rates

Description	On Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate *
MTDC - On or Off Adjacent - DOD Contract					
MTDCA DOD Contract	No	2020	07/01/2019	30.00	30.00
MTDCA DOD Contract	Yes	2020	07/01/2019	57.00	57.00
MTDCA DOD Contract	No	2021	07/01/2020	30.00	30.00
MTDCA DOD Contract	Yes	2021	07/01/2020	57.00	57.00
MTDC - On or Off Remote - DOD Contract					
MTDCR DOD Contract	No	2020	07/01/2019	28.50	28.50
MTDCR DOD Contract	Yes	2020	07/01/2019	57.00	57.00
MTDCR DOD Contract	No	2021	07/01/2020	28.50	28.50
MTDCR DOD Contract	Yes	2021	07/01/2020	57.00	57.00

**Fringe Benefits Tab -** Shows the fringe benefits rates that are available to be used for this proposal.

Fringe Benefits   Sync to Current Institutional Rates   Reset to Default Rates

Description	On Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate *
Employee Benefits					
Primary Research Fringe Rate	No	2018	07/01/2017	30.00	30.00
Primary Research Fringe Rate	Yes	2018	07/01/2017	30.00	30.00
Primary Research Fringe Rate	No	2019	07/01/2018	30.00	30.00
Primary Research Fringe Rate	Yes	2019	07/01/2018	30.00	30.00
Primary Research Fringe Rate	No	2020	07/01/2019	30.00	30.00
Primary Research Fringe Rate	Yes	2020	07/01/2019	30.00	30.00
Primary Research Fringe Rate	No	2021	07/01/2020	30.00	30.00

Inflation Tab - Shows the inflation rates available to be used for this proposal.

Inflation   Sync to Current Ins

Description	On Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate *
Inflation					
Inflation	No	2018	07/01/2017	4.00	4.00
Inflation	Yes	2018	07/01/2017	4.00	4.00
Inflation	No	2019	07/01/2018	4.00	4.00
Inflation	Yes	2019	07/01/2018	4.00	4.00
Inflation	No	2020	07/01/2019	4.00	4.00
Inflation	Yes	2020	07/01/2019	4.00	4.00

Personnel Costs Section

![Personnel Costs menu with Project Personnel and Assign Personnel to Periods subsections]
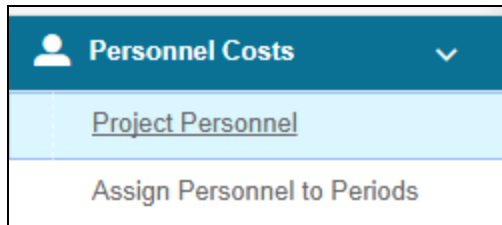
Personnel Costs has two subsections. Click on each one to see the details for each.

Project Personnel Subsection

Project Personnel
Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

Person	Job Code	Appointment Type	Base Salary
From Proposal Development			
Mosi A Skerritt (PI)	DEFAULT (AA000)	12M EMPLOYEE	100,000.00
Sally Egloff (COI)	DEFAULT (AA000)	12M EMPLOYEE	90,000.00

List of personnel assigned to the project.
Person: name of the person assigned
Job Code: job category selected for this person
Appointment Type: type of appointment (Reg, 10 month, 12 month, summer)
Based Salary: salary base for this proposal (not necessarily the person's actual salary)

Assign Personnel to Periods Subsection

Period 1	Period 2						
Period 1							
Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe
A Faculty Salary - Non-tenured, 12 mos Primary Rate							
David Paul Roy	01/01/2018	12/31/2018	25.00	25.00	Calendar	18,750.00	5,625.00
A Faculty Salary - Tenured, 12 mos Primary Rate							
Carlos Edibaldo Silva	01/01/2018	12/31/2018	50.00	40.00	Calendar	40,000.00	12,000.00

Shows personnel and effort for each period.
Person: Appointment type, fringe rate, and name of the person
Start: start date for this period
End: end date for this period
Effort: percentage planned effort for this period for this person
Charged: percentage charged for this period for this person (if less than effort, this implies cost sharing)
Period Type: type of period for charging
Requested Salary: multiplication of base salary X effort X period type
Calculated Fringe: multiplication of Requested Salary X fringe rate for this person

Non-Personnel Costs Section

Shows non-personnel costs for the period.
Description (1): budget category for item
Description (2): description of item
Quantity: should always be 1
Total Base Cost: cost of item

Subawards Section

If there are any subawards on this proposal and it is an S2S proposal, the subaward budgets can be viewed here. When you click on Details, you will see the Subaward Details popup.

Click on View PDF to see the complete subaward budget.

Institutional Commitments Section

There are two types of Institutional Commitments - Cost Sharing and Unrecovered F&A. Click on each to see the details.

Cost Sharing Subsection

	Period	Percentage	Source Account	Amount	Unit Details
1	1: 01/01/2018 - 12/31/2018	0.00	1281501	19,760.00	1281501
				Total Allocated: 19,760.00 Total Unallocated: 20,550.40	

Cost Sharing — Assign and distribute any additional unallocated expenses to stakeholders, institutions, or other individuals. *(View Summary / View Subs...)*

If present, shows cost sharing commitment for this budget.
Period: shows period that commitment will be funded
Percentage: not used by UMD
Source Account: unit ID providing the funds for the cost share
Amount: amount source account is providing
  Total Allocated: funds currently accounted for
  Total Unallocated: funds that still need to be accounted for
Unit Details: unit ID

Unrecovered F&A Subsection

	Fiscal Year	Applicable Rate	On Campus	Source Account	Amount
1	2018	52.00	Yes		312.00
2	2018	27.50	No		0.00
3	2019	52.00	Yes		0.00
4	2019	27.50	No		0.00

Unrecovered F&A — Assign and distribute unallocated expenses to stakeholders, institutions, or other individuals. *(View Summary)*

Shows any unrecovered F&A for this budget. Unrecovered F&A is for situations where the F&A rate for a given item is below the rate for the entire project. While there must be an amount here to match the unrecovered F&A, UMD does not use this information.

Project Income Section

Budget Period *	Description *	Project Income *
1: 01/01/2018 - 12/31/2018	Project Income	400.00

Project Income — Verify and adjust additional program income costs as necessary for this budget.

Shows anticipated project income. If blank, there is none.
Budget Period: period that the income is anticipated
Description: description of anticipated income
Project Income: amount of anticipated income

Modular Section

	Period 1 11/30/2019 - 11/29/2020 $154,500.00	Period 2 11/30/2020 - 11/29/2021 $154,500.00	Period 3 11/30/2021 - 11/29/2022 $154,500.00	All Periods 11/30/2019 - 11/29/2022 $463,500.00
Direct Costs ⌄				
Consortium F&A	$100,000.00	$100,000.00	$100,000.00	$300,000.00
Direct Costs Less Consortium F&A (Detailed Actuals)	-$100,000.00	-$100,000.00	-$100,000.00	-$300,000.00
Module Requested	$0.00	$0.00	$0.00	$0.00
Total (Module Requested + Consortium F&A)	$100,000.00	$100,000.00	$100,000.00	$300,000.00
Indirect Costs				
Indirect Cost Rate	54.5%	54.5%	54.5%	54.5%
Indirect Cost Base	$100,000.00	$100,000.00	$100,000.00	$300,000.00
Indirect Funds Requested	$54,500.00	$54,500.00	$54,500.00	$163,500.00
Total Indirect Cost Requested	$54,500.00	$54,500.00	$54,500.00	$163,500.00
Modular Total Direct and Indirect Costs				
Modular Total Direct and Indirect Costs	$154,500.00	$154,500.00	$154,500.00	$463,500.00
Cumulative Budget				
Direct Cost Less Consortium F&A				-$300,000.00
Consortium F&A				$300,000.00
Total Direct				$300,000.00
Total Indirect				$163,500.00
Total Direct & Indirect				$463,500.00

Shows the detail for a modular budget. Modular budgets are used only for certain NIH proposals. If a modular budget is not used, this will be blank. **PLEASE NOTE:** KR is having a display bug on the date. This does NOT affect the form. So please check your form once you have completed the budget and mark of submission. (As of 10/21/2019)

Budget Notes Section

Budget Notes

This area contains a consolidated list of justification notes that have been added to items in your budget. The last user to add a justification is listed above the text box. To bring in the latest updates, click **Consolidate Expense Justifications**.

Updated by: admin

Last updated: 08/01/2017 03:52:45

Notes:
Budget notes and short justification.

Any budget notes are displayed here. Budget notes are for internal use only and are not submitted to the sponsor.

Budget Summary Section

Budget Summary

	P1 (01/01/2018 - 12/31/2018)	P2 (01/01/2019 - 12/31/2019)	Totals
Personnel			
› Salary	$58,750.00	$61,100.00	$119,850.00
› Fringe	$17,625.00	$18,330.00	$35,955.00
Calculated Direct Costs	$0.00	$0.00	$0.00
Personnel Subtotal	$76,375.00	$79,430.00	$155,805.00
Non-personnel			
› Equipment	$5,000.00	$5,200.00	$10,200.00
› Travel	$2,000.00	$2,080.00	$4,080.00
› Other Direct	$600.00	$624.00	$1,224.00
Calculated Direct Costs	$0.00	$0.00	$0.00
Non-personnel Subtotal	$7,600.00	$7,904.00	$15,504.00
Totals			
Total Direct Cost	$83,975.00	$87,334.00	$171,309.00
Total F&A Costs	$40,755.00	$42,709.68	$83,464.68
Totals Subtotal	$124,730.00	$130,043.68	$254,773.68

Summary of information provided for this budget listed by the budget section and then totals.

Access Section

Displays who has access to the proposal. Aggregators can add/remove view access after a proposal has been submitted to sponsor.

Permissions

User Name	Roles
admin	Aggregator Document Level

Supplemental Information Section

Admin Costs Included: describes if admin costs are included as direct costs and why

IDC Rate: percentage rate for IDC

IDC Rate Type: the type of IDC rate is used

IDC Reason: the reason that rate is used

NSPIRES USERNAME: if an NSPIRES proposal, username of PI

Still Have Questions?

Please contact Kuali Research Help: **kr-help@umd.edu**