



Kuali Research: Investigator and UMD Key Person Certification Guide

**Kuali Research Help Contact: kr-help@umd.edu
Last updated:11/11/24**

Reviewing the Proposal Before Certifying

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

1. Open the email notification from Kuali Research with the subject line:
“Certification is required for Proposal: [Title of the Proposal]”
2. Click on the blue link [Click Here to Review Proposal](#) from the Certification email.

Please review the following proposal and then complete the certification questions if you agree to participate in the project. Proposal Details as follows:

Proposal Title: Questionnaire - NFA - UMCP - CK

Principal Investigator: Amitabh Varshney

Lead Unit: CC010760 - BSOS-Anthropology

Sponsor: 000112 - DOJ - US Department of Justice

Deadline Date: 10/31/2024

Proposal Number: 85444

Link to review proposal: [Click Here to Review Proposal](#) JMD credit allocation is found under the Personnel tab

Link to complete certification: [Click Here to Complete your Certification](#)

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

Note the proposal number in the email. Go to the Kuali Research Dashboard homepage and find the proposal on your “Proposals Not Routing” card.

The screenshot shows the Kuali Research Dashboard. On the left is a navigation menu with 'Dashboard', 'Search Records', 'Common Tasks', and 'All Links'. The main content area is titled 'Dashboard' and has a 'Show/hide cards' button. There are two main cards: 'Proposals routing to me' and 'Proposals not routing'. The 'Proposals not routing' card is expanded, showing a table with one proposal. The proposal number '63150' is highlighted with a red box. The table also shows the PI name 'Kang, Christine' and the due date '5/01/2022'.

Proposal	Due date:	Last action:
Proposal #63150	5/01/2022	9/21/2021 9:15 AM

Filter

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

The screenshot shows a filter interface. At the top right, it says '1 Filter Applied'. Below that, there is a search bar with the text 'Where Proposal Number is 63150'. There is a dropdown arrow next to 'Proposal Number' and a close button (X) next to the search bar. Below the search bar is a button that says '+ Add a Filter'.

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 by showing additional columns.

The screenshot shows the KUALI RESEARCH interface. On the left, a dark sidebar contains navigation options: Dashboard, Search Records (highlighted with an orange box), Common Tasks, and All Links. The main area is titled 'Search Records' and features a search bar with the text '56659' and a dropdown menu set to 'Search everywhere'. Below the search bar, there are two columns: 'Development Proposal Number' and 'Document Number'. The first row of data shows the values '56659' and '3693878'.

3.) Searching for your Proposal from the Common Tasks

Click Common Tasks > click Search Proposals under Proposal Development.

The screenshot shows the KUALI RESEARCH interface. On the left, a dark sidebar contains navigation options: Dashboard, Search Records, Common Tasks (highlighted with a red box), and All Links. The main area is titled 'Proposal Development' and contains three buttons: 'All My Proposals', 'Create Proposal', and 'Search Proposals' (highlighted with a red box).

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

The screenshot shows the 'Development Proposal Lookup' screen. It has a large heading 'Development Proposal Lookup' and a form with a label 'Proposal Number:' and an empty input field.

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

Proposal Development

Proposal: #85444
PI: Amitabh Varshney

✓ Data Validation

Proposal Details

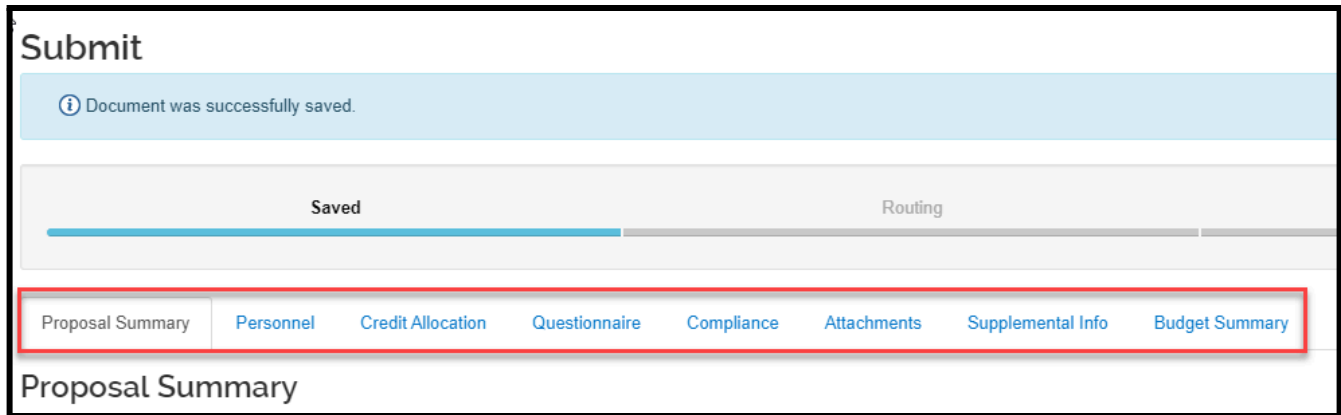
* indicates required fields

Document was successfully saved.

Proposal Type: *	New
Lead Unit:	CC010760 - BSOS-Anthropology
Activity Type: *	Research - Basic
Project Dates: *	11/01/2024
Project Title: *	Sample Proposal Title
Sponsor: *	000112
Prime Sponsor Code:	

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

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



- **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, and Reason, Sponsor & Budget Contacts.
- **Budget Summary Tab:** Displays budget details by period and totals, as well as personnel and non-personnel costs.

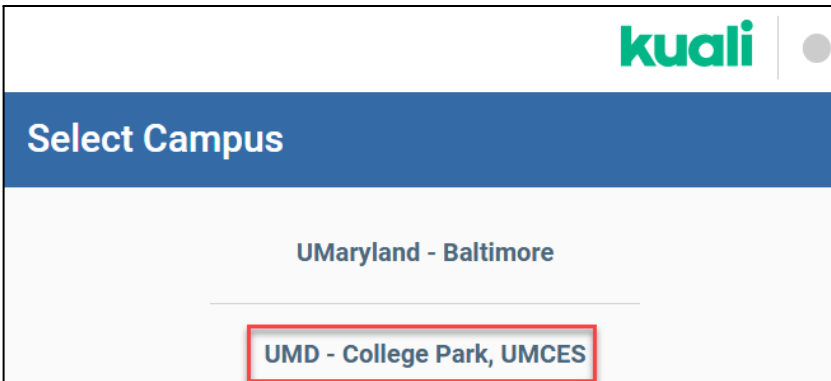
Click on Close to close out of the proposal and return to the Kualu Research Dashboard home screen. Go back to your Notification email.

Certification for UMD Personnel (Investigators and UMD Key Persons)

1.) Click on the blue link [Click Here to Complete your Certification](#).

Please review the following proposal and then complete the certification questions if you agree to participate in the project. Proposal Details as follows:
Proposal Title: Questionnaire - NFA - UMCP - CK
Principal Investigator: Amitabh Varshney
Lead Unit: CC010760 - BSOS-Anthropology
Sponsor: 000112 - DOJ - US Department of Justice
Deadline Date: 10/31/2024
Proposal Number: 85444
Link to review proposal: [Click Here to Review Proposal](#) UMD credit allocation is found under the Personnel tab
Link to complete certification: [Click Here to Complete your Certification](#)

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



Select Campus

UMaryland - Baltimore

UMD - College Park, UMCES

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 Kuali Research Dashboard home screen.



Investigator Certification

[Clear All Answers](#)

I have conducted lobbying efforts related to this proposal. ⓘ

Yes

No

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

Yes

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) ⓘ

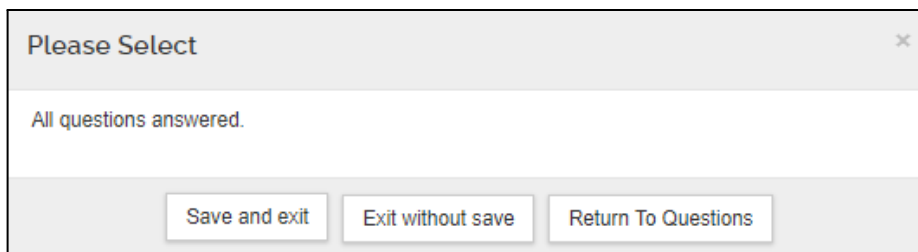
I have followed proposal/sponsor requirements in disclosing all professional activities including those performed within and outside of the University of Maryland (paid and unpaid), including foreign affiliations and/or support from other companies, universities, and government entities (eg. Talent programs; 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.

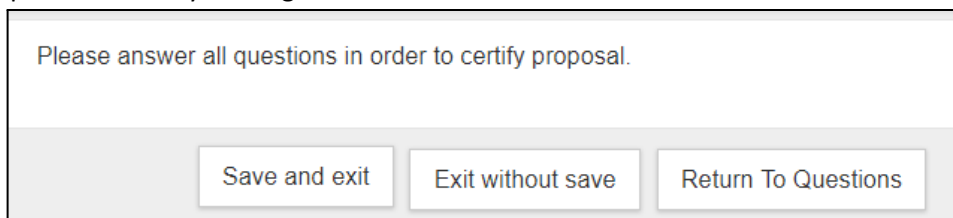
When you have answered all of the questions and click the [Certify Answers] button, a pop-up window will appear stating **“All questions answered”** and provide you with three options:

- **[Save and Exit]** This will save all 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 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 return 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. Your 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.