



## **Kuali Research: Investigator Certification Guide**

Kuali Research Help Contact: [kr-help@umd.edu](mailto:kr-help@umd.edu)

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# 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

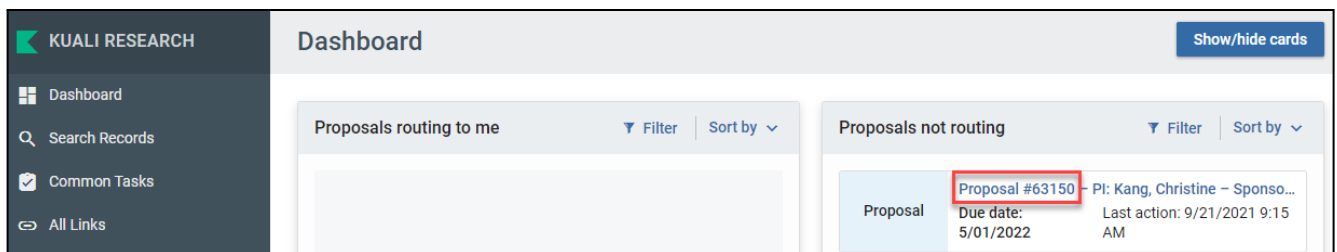
Sponsor: 208497 - US Air Force

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

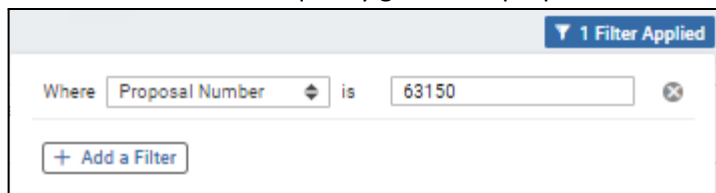
## 1.) Searching for Your Proposal within the Proposals Not Routing Dashboard Card

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.

Development Proposal Number	Document Number
<a href="#">56659</a>	3693878

## 3.) Searching for your Proposal from the Common Tasks

Click Common Tasks > click Search Proposals under Proposal Development

Proposal Development

- All My Proposals
- Create Proposal
- Search Proposals

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.

# Submit

*i* Document was successfully saved.

Saved

Routing

Proposal Summary

Personnel

Credit Allocation

Questionnaire

Compliance

Attachments

Supplemental Info

Budget Summary

## Proposal Summary

- **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.

4

# 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

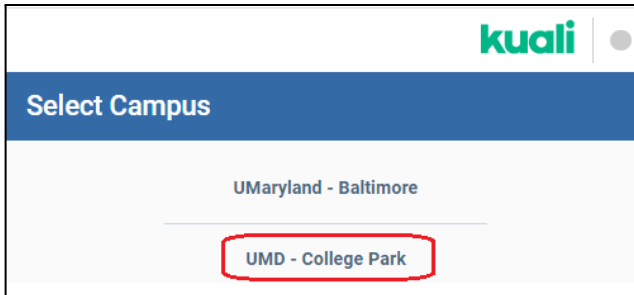
Principal Investigator: Sally Egloff

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

Sponsor: 208497 - US Air Force

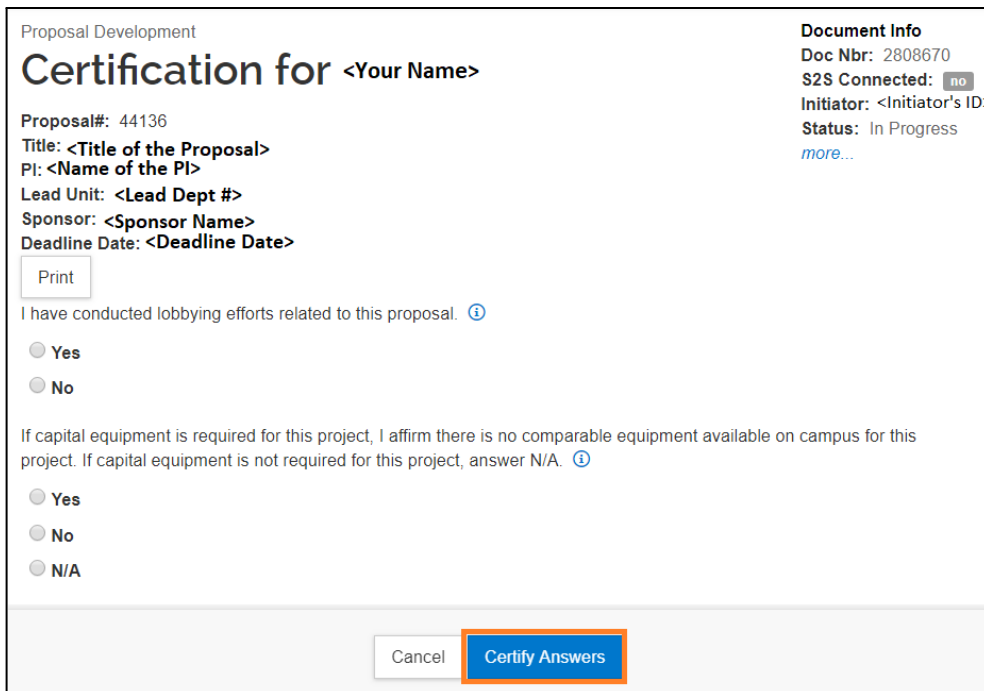
Deadline Date: 11/25/2020

- 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.



The image shows a web interface for selecting a campus. At the top right is the 'kuali' logo. Below it is a blue header bar with the text 'Select Campus'. Underneath, there are two options: 'UMaryland - Baltimore' and 'UMD - College Park'. The 'UMD - College Park' option is highlighted with a red rectangular box.

- 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.



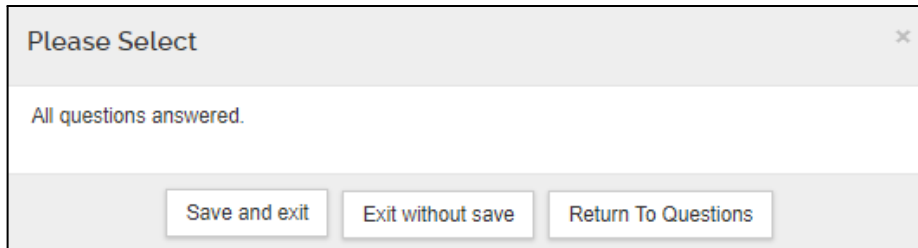
The image shows a 'Certification for <Your Name>' form. At the top left, it says 'Proposal Development'. The title is 'Certification for <Your Name>'. Below the title, there are fields for 'Proposal#:', 'Title:', 'PI:', 'Lead Unit:', 'Sponsor:', and 'Deadline Date:'. A 'Print' button is located below these fields. On the right side, there is a 'Document Info' section with fields for 'Doc Nbr:', 'S2S Connected:', 'Initiator:', and 'Status:'. Below the 'Print' button, there is a question: 'I have conducted lobbying efforts related to this proposal.' with radio button options for 'Yes' and 'No'. Below this, there is another question: 'If capital equipment is required for this project, I affirm there is no comparable equipment available on campus for this project. If capital equipment is not required for this project, answer N/A.' with radio button options for 'Yes', 'No', and 'N/A'. At the bottom, there are two buttons: 'Cancel' and 'Certify Answers'.

## Check Box Certifications

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

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:

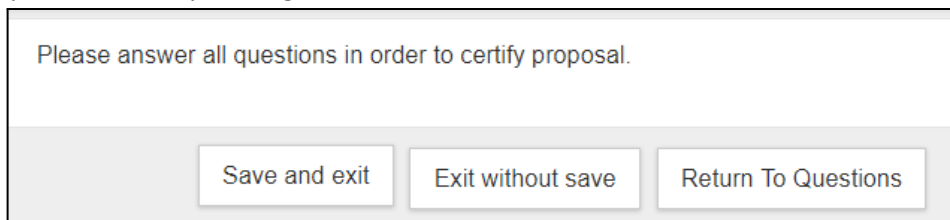
- **[Save and Exit]** This will save all of your answers and exit the questionnaire.
- **[Exit without save]** This will not save any of your answers and exit the questionnaire.
- **[Return To Questions]** This will return you back to the questionnaire.



The screenshot shows a light gray pop-up window with a title bar that says 'Please Select' and a close button (X) in the top right corner. The main content area is white and displays the text 'All questions answered.' in a blue font. At the bottom, there is a light gray bar containing three white buttons with black text: 'Save and exit', 'Exit without save', and 'Return To Questions'.

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.



The screenshot shows a light gray pop-up window with a white content area displaying the text 'Please answer all questions in order to certify proposal.' in a blue font. At the bottom, there is a light gray bar containing three white buttons with black text: 'Save and exit', 'Exit without save', and 'Return To Questions'.

### 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.