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What is Proposal Development?

The Proposal Development module contains records of proposals which 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 need and is not open 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 by clicking on the Medusa tab within an Award, Institute Proposal, or Subaward record.

Searching in Proposal Development
From the Unit tab, click on the to the right of Proposal Development. This will open the Proposal Development Lookup screen.
Accessing Proposal Development from Medusa

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 easily 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.
Development Proposal Lookup Screen
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, no leading zeros
Proposal Type: type of proposal submission; pull down
Proposal State: routing/approval status; pulldown
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: not used at UM
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 search icon 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.

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 rights 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.

![Proposal Table]

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.
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.

<table>
<thead>
<tr>
<th>Proposal Summary</th>
<th>Personnel</th>
<th>Credit Allocation</th>
<th>Compliance</th>
<th>Attachments</th>
<th>Questionnaire</th>
<th>Supplemental Info</th>
<th>Keywords</th>
<th>Budget Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>comK DO NOT SUBMIT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>Nom A Skerritt</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lead Unit</td>
<td>1280101 - BSOS-College of Behavioral &amp; Social Sciences</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity Type</td>
<td>Research - Basic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposal Number</td>
<td>44367</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Start Date</td>
<td>12/01/2019</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project End Date</td>
<td>01/31/2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Include Subaward(s)?</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsor Name</td>
<td>NSF</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsor Deadline Date</td>
<td>04/18/2019</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsor Deadline Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Proposal Summary</th>
<th>Personnel</th>
<th>Credit Allocation</th>
<th>Compliance</th>
<th>Attachments</th>
<th>Questionnaire</th>
<th>Supplemental Info</th>
<th>Keywords</th>
<th>Budget Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key Person</td>
<td>Role</td>
<td>Unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ashwani K. Gupta</td>
<td>Principal Investigator</td>
<td>(Load Unit) 1322101 - ENGR-Mechanical Engineering</td>
<td>complete (view)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dongxia Liu</td>
<td>Co-I (UMB Routing Req’d)</td>
<td>1320501 - ENGR-Chemical &amp; Biomolecular Engineering</td>
<td>complete (view)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Co-I (UMB Routing Req’d) is Co-investigator. Please ignore the (UMB Routing Req’d) for UM, College Park Users.
Credit Allocation Tab
The Credit Allocation tab lists how the credit split has been allocated to each investigator across all of their associated units.

<table>
<thead>
<tr>
<th>Most A Skerritt</th>
<th>Recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1211091 - SSGS-Geography</td>
<td>100</td>
</tr>
<tr>
<td>1420103 - VPR-Research Administration</td>
<td>0</td>
</tr>
<tr>
<td>Unit Total:</td>
<td>100</td>
</tr>
<tr>
<td>Sally Egloff</td>
<td>25</td>
</tr>
<tr>
<td>1420103 - VPR-Research Administration</td>
<td>100</td>
</tr>
<tr>
<td>Unit Total:</td>
<td>100</td>
</tr>
<tr>
<td>Investigator Total:</td>
<td>100</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Type</th>
<th>Approval Status</th>
<th>Protocol Number</th>
<th>Application Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Subjects</td>
<td>Pending</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- The Proposal Tab is used only for S2S proposal and contains any attachments for submittal to the sponsor.
- The Personnel Tab is used only for S2S proposal 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 easily 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.

![Questionnaire Tab](image)

**Supplemental Info Tab**
The Supplemental Info Tab displays more proposal-specific info including Admin Costs designation, F&A Rate, Type, and Reason as well as other contact information for the budget and sponsor.

![Supplemental Info Tab](image)
**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.

**F&A Rate subsection**
This F&A Rates subsection shows the predefined institutional rate and applicable rates 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

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

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 zeroes)

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

Click anywhere off the panel to close it.
Proposition Sections Menu

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

The highlighted proposition section is what is being displayed in the main proposition window.

If a proposition 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 version. Allow to create, finalize and include the budget version of user’s choice on to the proposal
Link: Displays the proposal link
Help: displays the guidebook

Print

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

Once you’ve expanded the desired section, click on the checkbox under Select for each form you want 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 to 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 teaching mainly.
- 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, 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**

<table>
<thead>
<tr>
<th>Opportunity Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove opportunity</td>
</tr>
<tr>
<td>Change opportunity</td>
</tr>
<tr>
<td>Opportunity ID:</td>
</tr>
<tr>
<td>Opportunity Title:</td>
</tr>
<tr>
<td>Submission Type:</td>
</tr>
<tr>
<td>S2S Revision Type:</td>
</tr>
<tr>
<td>CFDA Number:</td>
</tr>
<tr>
<td>Competition Id:</td>
</tr>
<tr>
<td>Opening Date:</td>
</tr>
<tr>
<td>Closing Date:</td>
</tr>
<tr>
<td>Instruction Page:</td>
</tr>
<tr>
<td>Schema URL:</td>
</tr>
<tr>
<td>S2S Provider:</td>
</tr>
</tbody>
</table>

**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

**CFDA Number**: Catalog for Federal Domestic Assistance - assigned by agency

**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
Forms Tab

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Mandatory</th>
<th>Include</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFRI_Project_Type</td>
<td>No</td>
<td></td>
<td>Unavailable</td>
</tr>
<tr>
<td>Attachments_1_ZV1_2</td>
<td>No</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>HHS_CheckList_2_1-V2.1</td>
<td>No</td>
<td></td>
<td>Unavailable</td>
</tr>
<tr>
<td>HRSA_AENT</td>
<td>No</td>
<td></td>
<td>User Attached Form</td>
</tr>
<tr>
<td>HRSA_NFLP</td>
<td>No</td>
<td></td>
<td>Unavailable</td>
</tr>
<tr>
<td>Key_Contacts</td>
<td>No</td>
<td></td>
<td>Unavailable</td>
</tr>
<tr>
<td>NASA_SeniorKeyPersonSupplementalDataSheet-V1.0</td>
<td>No</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>NSF_CoverPage_1_7-V1.7</td>
<td>No</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>NSF_SuggestedReviewers-V1.1</td>
<td>No</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>RBSF424_SBF428V-V1.1</td>
<td>No</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>RR_Budget_1_4</td>
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<td></td>
<td>Available</td>
</tr>
<tr>
<td>RR_SBF424_2_0-V2.0</td>
<td>Yes</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>RR_SubawardBudget10_10_1_4</td>
<td>No</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>RR_SubawardBudget10_30_1_4</td>
<td>No</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>RR_SubawardBudget30_1_4</td>
<td>No</td>
<td></td>
<td>Available</td>
</tr>
</tbody>
</table>

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

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

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

**Submission By:** OSP

**Submission Type:** Electronic

**Submission Account ID:**

**Submission Name & Address:**

**Number of copies:**

**Submission description:** grants.gov

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

Contains proposal submission information related to the sponsor and program.

**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

**CFDA Number**: for federal submissions, the number identified by the funding 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

**Opportunity Title**: title of opportunity
### Organization and Locations Subsection

#### Organizations & Locations

<table>
<thead>
<tr>
<th></th>
<th>Applicant Organization</th>
<th>Performing Organization</th>
<th>Performance Site Locations</th>
<th>Other Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Applicant Organization Tab</strong></td>
<td>University of Maryland information</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Applicant Organization</strong></td>
<td>421583</td>
<td>32885</td>
<td>000001</td>
<td></td>
</tr>
<tr>
<td><strong>Organization Name</strong></td>
<td>University of Maryland</td>
<td>Office of Sponsored Programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Address Line 1</strong></td>
<td>Office of Research Administration</td>
<td>3112 Lee Building 7809 Regents Drive</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Address Line 3</strong></td>
<td>College Park</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>MD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Postal Code</strong></td>
<td>20742-5141</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Performing Organization Tab

University of Maryland information

<table>
<thead>
<tr>
<th></th>
<th>Performing Organization</th>
<th>University of Maryland</th>
<th>Office of Sponsored Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organization Name</strong></td>
<td></td>
<td>32885</td>
<td></td>
</tr>
<tr>
<td><strong>Address Line 1</strong></td>
<td>Office of Sponsored Programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Address Line 2</strong></td>
<td>3112 Lee Building</td>
<td>32885</td>
<td></td>
</tr>
<tr>
<td><strong>Address Line 3</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>City</strong></td>
<td>College Park</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>MD</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Postal Code</strong></td>
<td>20742-5141</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Performance Site Locations Tab**
If there are any off-campus performance sites for three consecutive months, they will be shown here.

![Performance Site Locations](image)

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

![Other Organizations](image)

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

Personnel Subsection

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

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 not included
### Organization Tab

<table>
<thead>
<tr>
<th>Organization</th>
<th>Details</th>
<th>Global Location: University of Maryland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address: <a href="mailto:ckang1@umd.edu">ckang1@umd.edu</a></td>
<td>Address Line 1: University of Maryland</td>
<td></td>
</tr>
<tr>
<td>Office Phone: 301-405-5736</td>
<td>Address Line 2: 010/1D Lee Building</td>
<td></td>
</tr>
<tr>
<td>Fax:</td>
<td>Address Line 3:</td>
<td></td>
</tr>
<tr>
<td>Pager:</td>
<td>City: College Park</td>
<td></td>
</tr>
<tr>
<td>Mobile:</td>
<td>Country: United States</td>
<td></td>
</tr>
<tr>
<td>Primary Title: Specialist</td>
<td>State: US - MARYLAND</td>
<td></td>
</tr>
<tr>
<td>Directory Title: Specialist</td>
<td>Postal Code: 20742-0001</td>
<td></td>
</tr>
<tr>
<td>Home Unit: 1420103</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Division:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Secondary Office**
- Location: Salary Anniversary
- Faculty: false

**Effort**
- Total Effort: 
- Academic Year Effort: 
- Calendar Year Effort: 
- Summer Effort: 

Address and unit information for the proposal person. Information comes from PHR. 

**Effort**: not used at UMD

### Extended Details Tab

<table>
<thead>
<tr>
<th>Extended Details</th>
<th>Details</th>
<th>Global Location: University of Maryland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Information</td>
<td>Address Line 1: University of Maryland</td>
<td></td>
</tr>
<tr>
<td>Age by Fiscal Year: 0</td>
<td>Address Line 2: 010/1D Lee Building</td>
<td></td>
</tr>
<tr>
<td>KcPersonId: YOUR UID</td>
<td>Address Line 3:</td>
<td></td>
</tr>
<tr>
<td>Handicap Type:</td>
<td>City: College Park</td>
<td></td>
</tr>
<tr>
<td>Veteran Type:</td>
<td>Country: United States</td>
<td></td>
</tr>
<tr>
<td>Visa Code:</td>
<td>State: US - MARYLAND</td>
<td></td>
</tr>
<tr>
<td>Visa Renewal Date:</td>
<td>Postal Code: 20742-0001</td>
<td></td>
</tr>
<tr>
<td>Is Vacation Accrual: false</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is on Sabbatical: false</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Id Provided:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pi Eligible:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country of Citizenship:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Citizenship Type: UNKNOWN</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Details</th>
<th>Organization</th>
<th>Extended Details</th>
<th>Degrees</th>
<th>Unit Details</th>
<th>Person Training Details</th>
<th>Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Person Training Details Tab
Not used at UMD

Certification Tab

Certification Converted YNQs

#35- Is there a real or potential conflict of interest in connection with this work involving this individual as defined by the University of Maryland Policies and Procedures II-3.1(s) or II-3.10(s)? (these procedures)
      No
      Lobbying activities have been conducted regarding the proposal
      No

#23- I affirm that if capital equipment required for use on this project is budgeted in this proposal, to the best of my knowledge, no comparable equipment is available on campus
      Yes

#30- I affirm that no changes to the scope, budget or institutional commitments will be made in the final proposal without first contacting ORAA
      Yes

#31- I affirm that the information submitted within the proposal is true, complete and accurate to the best of my knowledge
      Yes

#32- I affirm that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil or administrative penalties
      Yes

#33- I agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports if the project is awarded as a result of the proposal
      Yes

#37- I agree that if I earlier provided draft technical or other provisional material to ORAA, that I will provide ORAA with the final copy of the proposal as submitted to the sponsor
      Yes

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

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

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 Review, Conflict of Interest, Financial Conflict of Interest, etc.
Attachments Section
Attachments are split into a number of tabs.

<table>
<thead>
<tr>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal (2)</td>
</tr>
</tbody>
</table>

The Proposal Tab is used only for S2S proposal and contains any attachments for submittal to the sponsor.

The Personnel Tab is used only for S2S proposal 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.

<table>
<thead>
<tr>
<th>Proposal (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel (2)</td>
</tr>
</tbody>
</table>

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
Attachments related to the personnel assigned to the proposal

<table>
<thead>
<tr>
<th>File</th>
<th>Person</th>
<th>Type</th>
<th>Description</th>
<th>Uploaded By</th>
<th>Posted Timestamp</th>
</tr>
</thead>
<tbody>
<tr>
<td>box.pdf</td>
<td>Carlos Edvaldo Silva</td>
<td>Sketch</td>
<td>Silvadoroetch</td>
<td>admin admin</td>
<td>07/08/2017 12:12 PM</td>
</tr>
<tr>
<td>current_pending.pdf</td>
<td>Carlos Edvaldo Silva</td>
<td>Currentpending</td>
<td>Silvadorocurrentpending</td>
<td>admin admin</td>
<td>07/08/2017 12:12 PM</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>File</th>
<th>Type *</th>
<th>Status</th>
<th>Description</th>
<th>Uploaded By</th>
<th>Posted Timestamp</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placeholder.pdf</td>
<td>UM - ORA/SPA Placeholder</td>
<td>Draft</td>
<td>Kang, Christine</td>
<td>04/02/2019 06:11 AM</td>
<td></td>
</tr>
<tr>
<td>Placeholder2.pdf</td>
<td>UM - Departmental Budget</td>
<td>Final</td>
<td>Kang, Christine</td>
<td>04/02/2019 06:11 AM</td>
<td></td>
</tr>
<tr>
<td>placeholder_to_replace.docx</td>
<td>UM - ORA/SPA Placeholder</td>
<td>Draft</td>
<td>Kang, Christine</td>
<td>04/02/2019 06:11 AM</td>
<td></td>
</tr>
</tbody>
</table>

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 questionnaire(s) 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

<table>
<thead>
<tr>
<th>Name</th>
<th>Version</th>
<th>Direct Cost</th>
<th>F&amp;A</th>
<th>Total</th>
<th>Start</th>
<th>End</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final Budget</td>
<td>1</td>
<td>200,000.00</td>
<td>104,000.00</td>
<td>304,000.00</td>
<td>01/01/2018</td>
<td>12/31/2019</td>
<td>Incomplete</td>
</tr>
<tr>
<td>S2S Detail Budget (For submission)</td>
<td>2</td>
<td>171,309.00</td>
<td>83,776.68</td>
<td>255,085.68</td>
<td>01/01/2018</td>
<td>12/31/2019</td>
<td>Incomplete</td>
</tr>
</tbody>
</table>
Budget Details

When you click on the name of the budget, the system will display the detail 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 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.

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.

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

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

Personnel Costs has two subsections. Click on each one to see the detail for each.

**Project Personnel Subsection**

List of personnel assigned to the project.

- **Person**: name of 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**

Shows personnel and effort for each period.

- **Person**: Appointment type, fringe rate, and name of 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

<table>
<thead>
<tr>
<th>Description</th>
<th>Period 1</th>
<th>Period 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Equipment</td>
<td>Communication Field Equipment</td>
<td></td>
</tr>
<tr>
<td>Other Direct</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aggriculture Supplies</td>
<td>Agriculture supplies for field research</td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Out-of-State Travel</td>
<td>Travel to Conference in Chicago, IL</td>
<td></td>
</tr>
</tbody>
</table>

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 one to see the detail.

Cost Sharing Subsection

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

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

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Consortium F&amp;A</td>
<td>$154,500.00</td>
<td>$154,500.00</td>
<td>$154,500.00</td>
<td>$463,500.00</td>
</tr>
<tr>
<td>Direct Costs Less Consortium F&amp;A (Detailed Actuals)</td>
<td>-$100,000.00</td>
<td>-$100,000.00</td>
<td>-$100,000.00</td>
<td>-$300,000.00</td>
</tr>
<tr>
<td>Module Requested</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total (Module Requested + Consortium F&amp;A)</td>
<td>$154,500.00</td>
<td>$154,500.00</td>
<td>$154,500.00</td>
<td>$463,500.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Indirect Cost Rate</td>
<td>54.5%</td>
<td>54.5%</td>
<td>54.5%</td>
<td>54.5%</td>
</tr>
<tr>
<td>Indirect Cost Base</td>
<td>$100,000.00</td>
<td>$100,000.00</td>
<td>$100,000.00</td>
<td>$300,000.00</td>
</tr>
<tr>
<td>Indirect Funds Requested</td>
<td>$54,500.00</td>
<td>$54,500.00</td>
<td>$54,500.00</td>
<td>$163,500.00</td>
</tr>
<tr>
<td>Total Indirect Cost Requested</td>
<td>$54,500.00</td>
<td>$54,500.00</td>
<td>$54,500.00</td>
<td>$163,500.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Modular Total Direct and Indirect Costs</td>
<td>$154,500.00</td>
<td>$154,500.00</td>
<td>$154,500.00</td>
<td>$463,500.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Cost Less Consortium F&amp;A</td>
<td>-$300,000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consortium F&amp;A</td>
<td>$300,000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Direct</td>
<td>$300,000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Indirect</td>
<td>$163,500.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Direct &amp; Indirect</td>
<td>$463,500.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Shows the detail for a modular budget. Modular budgets are used only for certain NIH proposals. If 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

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

Budget Summary Section

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

Access Section
Displays who has access to the proposal.

Permissions

<table>
<thead>
<tr>
<th>User Name</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>admin</td>
<td>Aggregator Document Level</td>
</tr>
</tbody>
</table>
Supplemental Information Section
Displays other information about the proposal.

Other
Admin Costs Included:* 
Not Included (or XX account) - Not Included (or XX account)
admin_cost_reason
Budget Contact Email:
Budget Contact Name:
Budget Contact Phone:
Created By::
Christine Kang
Creation Date::
03-Jul-2017 10:07 AM
IDC Rate:* 
57
IDC Rate Type: *
TDC - Total Direct Cost
IDC_rate_type
IDC Reason: *
On Campus Research Contract - DOD - 57% MTDC
IDC_other_reason
NSPIRES USERNAME:
Pick up contact name:
Pick up contact phone:
Sponsor Contact Name:
Sponsor Email:
Sponsor Phone:
Sub Unit:
sub_unit

Creation Date: the date the proposal was created
Created by: directory ID of creator
IDC Rate Type: the type of IDC rate is used
Sponsor Contact Name: name of sponsor contact
Sponsor Email: email of sponsor contact
Sponsor Phone: phone # of sponsor contact

Budget Contact Name: name of budget contact
Budget Contact: email of budget contact
Budget Contact: phone # of budget contact

Pick up contact name: not used
Pick up contact phone: not used

IDC Rate: percentage rate for IDC
IDC Reason: reason that rate is used

NSPIRES USERNAME: if an NSPIRES proposal, username of PI
Sub Unit: used by CICS unit only
Admin Costs Included: describes if admin costs are included as direct costs and why

Still Have Questions?
Please contact Kuali Research Help:: kr-help@umd.edu