Approving an Application in Kuali  

**Purpose:** To understand the process for approving an application in the Kuali Proposal Development module.

You can approve proposals through an email link sent via the Kuali system, by using your Dashboard in Kuali or by searching directly for the proposal.

1. When a proposal has been submitted into routing, all people identified as needing to approve the application (PI and Multiple PI if applicable), PI’s Chair and Dean, other Key Personnel’s Chair and Dean, and others as applicable) will receive an email generated from the Kuali system alerting you to the need for action on a proposal. Click directly on the link in the email and it will take you to the proposal summary screen (image below). You can navigate through the tabs (Proposal Summary, Personnel, Compliance, Attachments, etc.) to see the application information.

2. To approve by searching directly, enter “search proposals” in the Proposal Development card on the main Kuali Common Tasks screen.

Next, enter search criteria, limit your search to only one data element (proposal number or last name of PI work well).

**Development Proposal Lookup**
To approve using the Dashboard to find a proposal, from the Kuali Common Tasks screen, click on DASHBOARD in the upper left corner.

From the Dashboard screen, go to the Proposals Routing to Me card, which should be the first card on the page.

Click ENTER or “search” at the bottom of the screen. Search results appear at the bottom of the page, find the proposal you are looking for and click “view.” The proposal will open and you will need to go to the “summary/submit” screen, which can be found using the navigation panel on the left side of the screen.
Locate the proposal that needs your approval – proposals awaiting your immediate approval will appear with a RED “You’re Up” label next to them. You can click on the row in the card to open the record and take the necessary action – the proposal will open in the summary/submit screen for that particular application.

4. Review and Approve from the SUMMARY/SUBMIT SCREEN:

Key personnel and credit split distributions can be found under the Personnel and Credit Allocation tabs. Please review to make sure the key personnel are identified correctly and that associated allocation and recognition percentages are in line with the work being proposed. The PI is responsible for entering the information at the time of application. All PIs and Co-Is will be required to certify that the information in the application is true and correct. Chairs, Deans and other approvers should review the credit split distribution as part of the approval process. The distributions entered at the time of application will carry through to any awards made and should be averaged across years for multiyear projects.
The proposal documents (narrative, budget justification, facilities, etc.) will be found under the **Attachments** tab. Within the Attachments tab, documents will be uploaded to one of three tabs, Proposal, Personnel and/or Internal. For system to system applications (to federal sponsors submitted through grants.gov), the documents will be found under the **Proposal** and **Personnel** tabs. For all other applications, the documents will be found under the **Internal** tab. Click on the **File name** to view the document.

Any commitments being made on behalf of the department or college or special considerations for the project can be found under the **Supplemental Info** tab.

A summary of the proposed budget for the project can be found under the **Budget Summary** tab.
Following review of the proposal, you can either approve the application or return it. To approve, simply click the **Approve** button (Blue below). To request modifications, click the **Return** button (Red below), enter a comment and the proposal will route back to ORSP for changes. The proposal will then be re-routed for approval following modifications. All individuals who have previously approved will need to do so again. The **View Route Log** button (Green below) shows where in the routing/approval process the proposal currently is and what other actions have been taken.