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” 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
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.

3. 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.

Last modified 9.2.20
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. Approval from the SUMMARY/SUBMIT SCREEN:

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. To request modifications, click the **Return** button and the proposal will bounce 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** tab shows where in the routing/approval process the proposal currently is and what other actions have been taken.