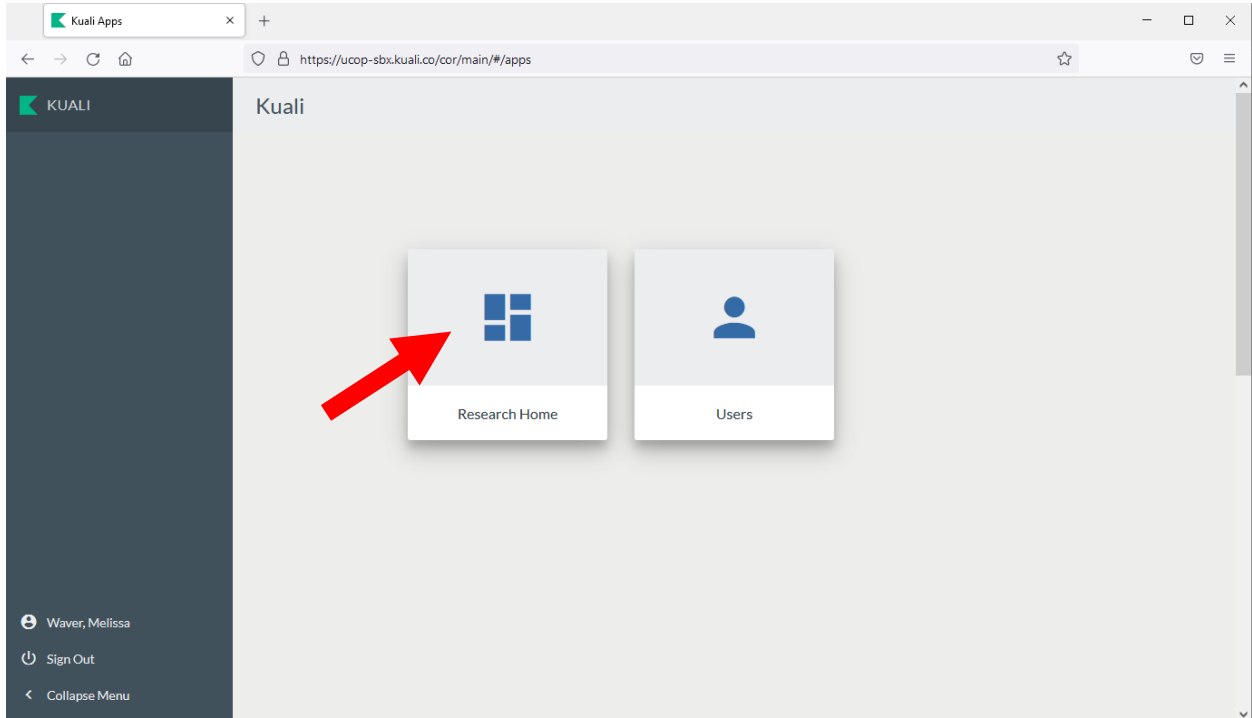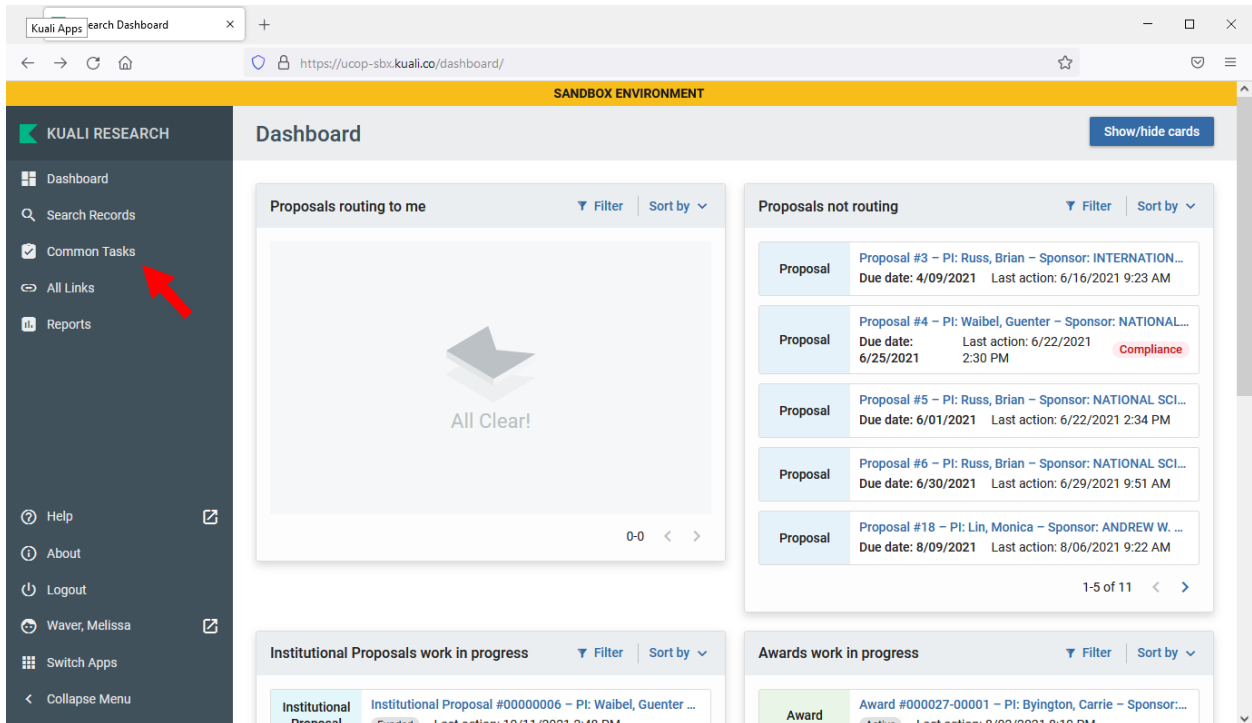**Creating a proposal – Instructions for routing a proposal to RPAC through Kuali Research for institutional review before submitting the proposal to an extramural sponsor.**
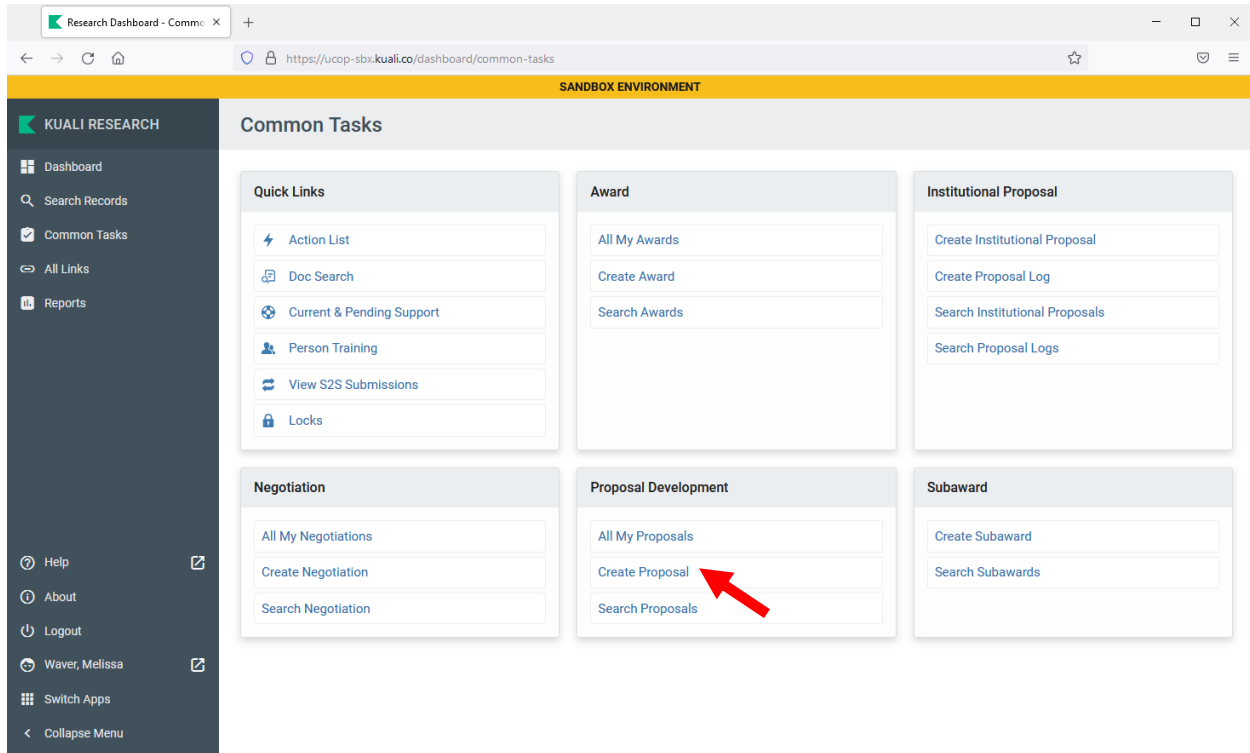
1. Log-in to Kuali and click on "Research Home."

2. Navigate to "Common Tasks" on the panel on the left side of the screen.

3. Click on "Create Proposal" under the "Proposal Development" section.

4. Fill in all applicable fields in the "Create Proposal" page. Fields marked with an asterisk are required.
   a. Some fields have a magnifying glass icon next to them. Clicking on the magnifying glass will allow you to search for a value. For example, clicking on the magnifying glass next to the "Sponsor" field will allow you to search for sponsors by various criteria, including sponsor name, sponsor code, DUNS, etc.
   b. Click on the magnifying glass next to "Principal Investigator" to search by the PI's name. This will bring up the PI's KC Person ID, which is required for the "Principal Investigator" field.

c. Click "Save" or "Save and Continue" to progress through the proposal development fields.

5. On the next screen, click on "Delivery Info" to specify who will submit the proposal (e.g. unit staff, the PI or RPAC) and how it must be submitted (e.g. email, an electronic system, etc.).

6. Click on "Sponsor & Program Information" and fill in applicable information.

7. Click on "Key Personnel," then "Personnel" then "Add Personnel" and add any co-PIs and other key/senior personnel if applicable.
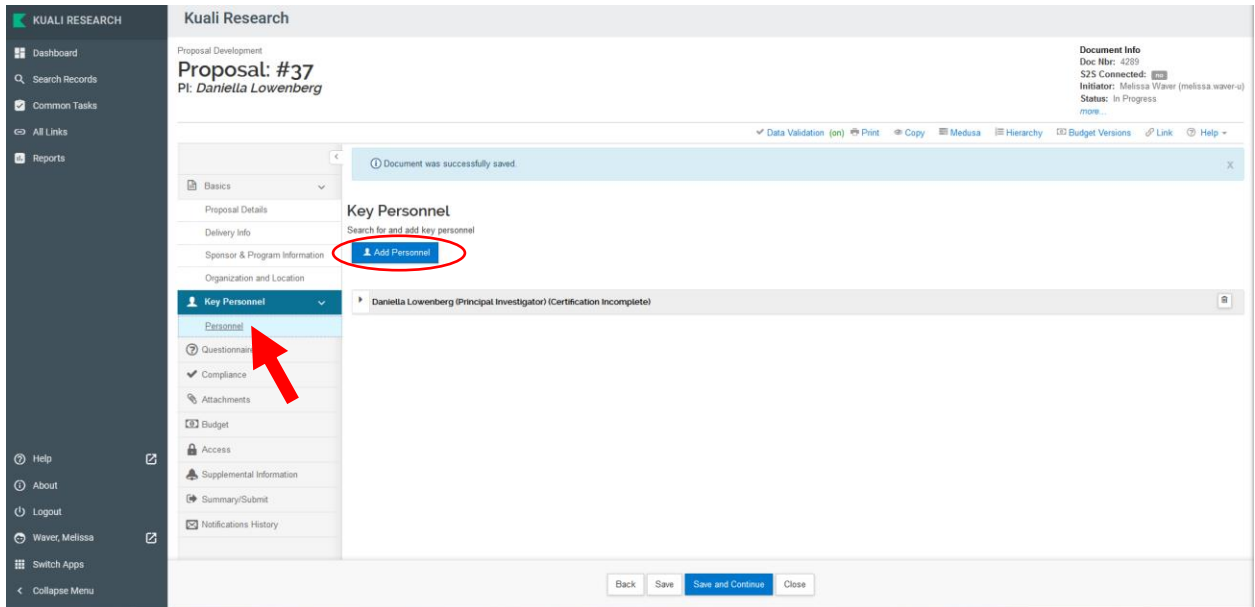
a. When approving the proposal in Kuali, the PI should click on the carrot next to their name, then "Proposal Person Certification." The PI should answer the questions on the screen and click "Save" at the bottom.
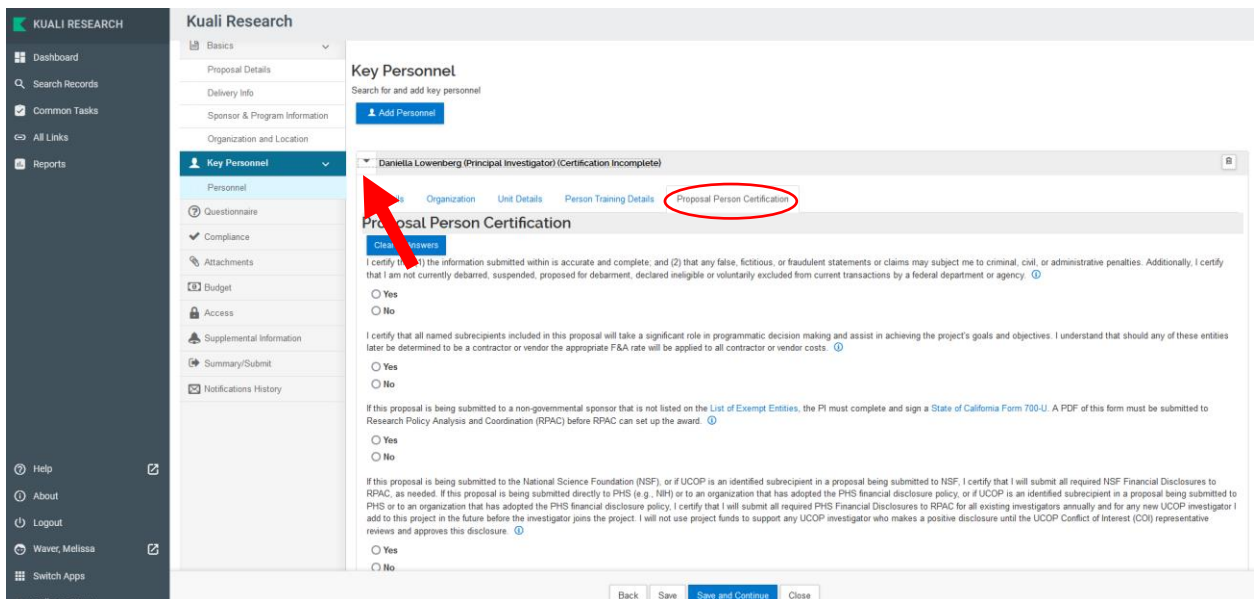
8. If the proposal involves a PI who requires an exception, compliance with conflict of interest regulations (e.g. for NSF or NIH), research on human or animal subjects, or export control management, click on the "Compliance" tab then "Add compliance entry" and fill in the requisite information.
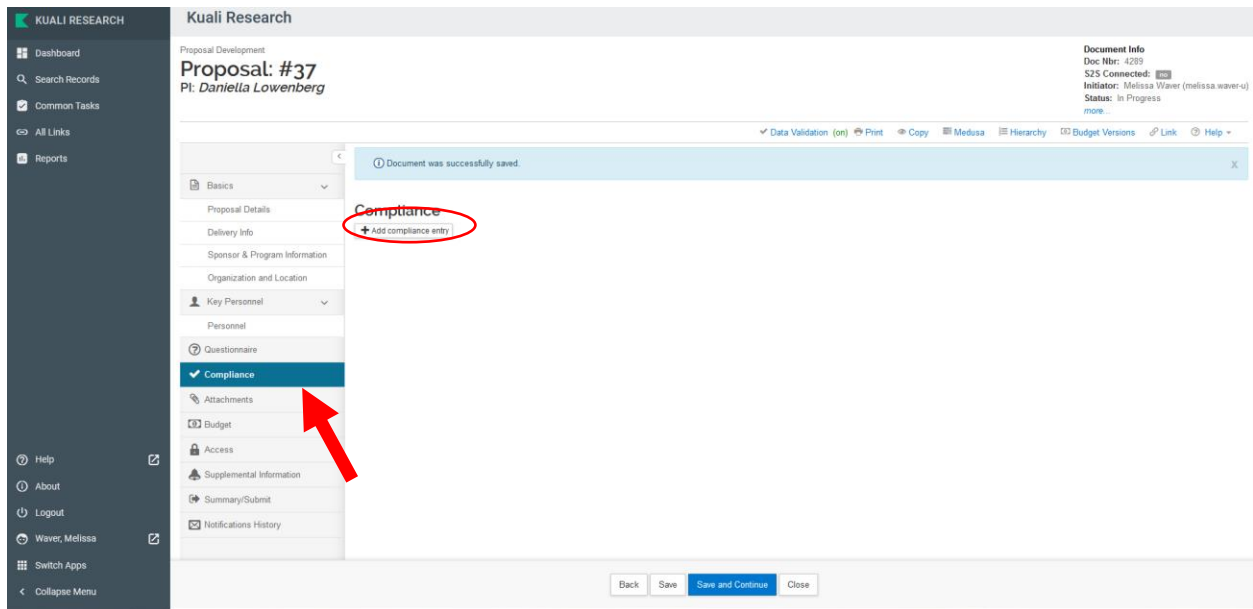
9. Click on "Attachments" and upload all proposal documents required for submission to the sponsor as well as the proposal submission guidelines/solicitation from the sponsor.

10. In the "Budget" section, click "Add Budget." Fill in the "Budget Name" field and select "Start a summary budget," then click "Create Budget." Fill in the applicable budget details.
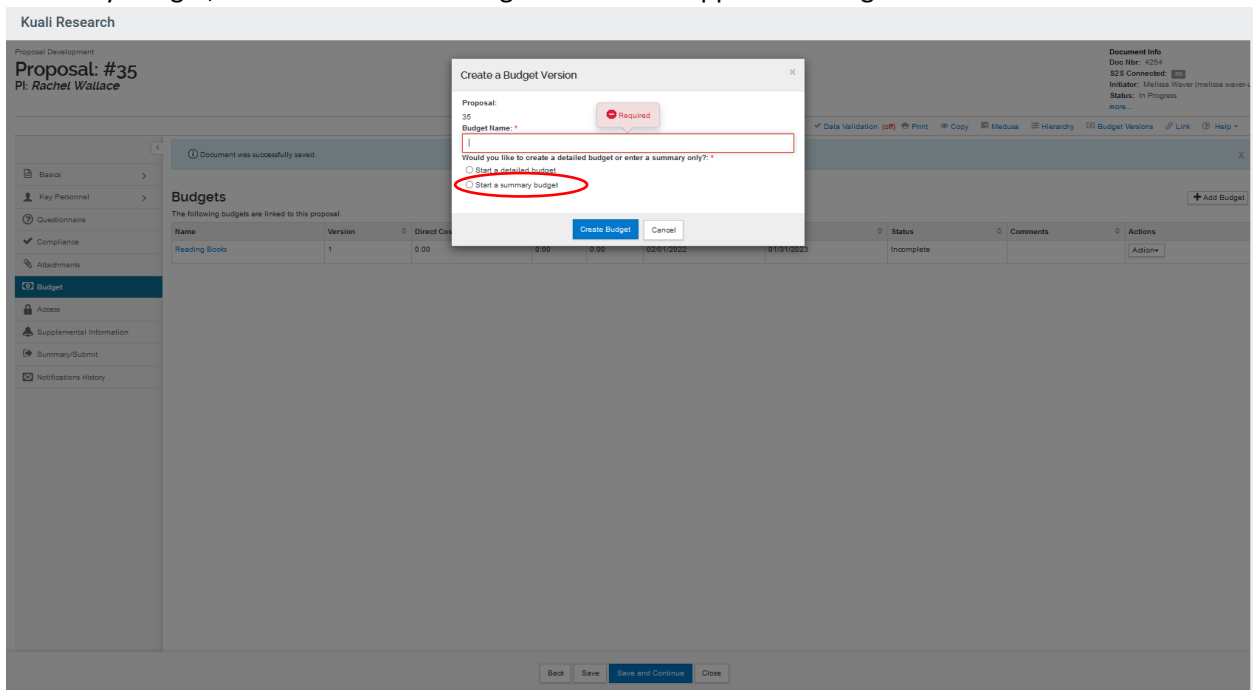
   a. If the proposal budget includes cost share, click on "Institutional Commitments," then "Cost Sharing" and fill in the "Source Account," "Unit Details" and "Cost Share Type." Use the magnifying glass icons to search for the correct details for each field.

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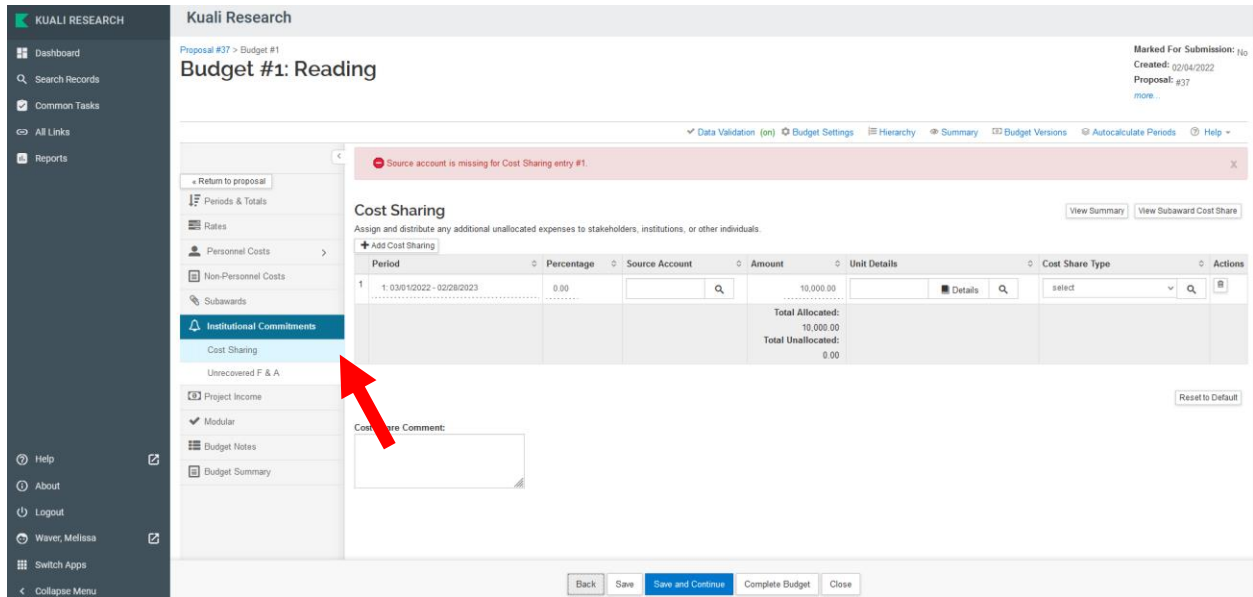
b. After creating the budget, click the "Action" drop-down menu and select "Complete Budget." Then, click the "Action" drop-down menu again and click "Include for Submission."
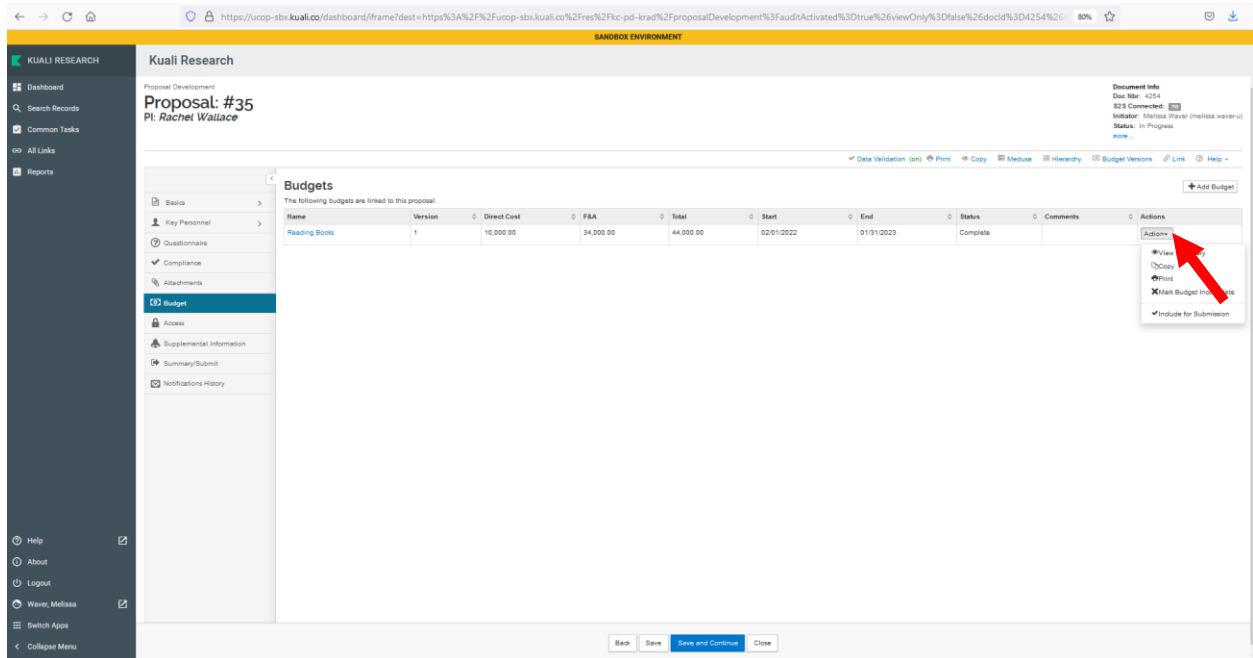

11. If the unit needs to add another user to the proposal (e.g. another department employee who can help with the proposal creation), click on "Access" to add a user.

12. Click on "Supplemental Information." Under "Oracle Information," add the financial unit account number. To search for the account number, click on the magnifying glass, then click the "Search"

button, and a list of all account numbers will appear. Answer the questions under "General" and click "Save."

    a. If the proposal contains subawards, list the subaward organizations in the "General" tab. The subawards do not need to be listed any other place in Kuali for proposal development. Be sure to also upload the subaward proposal documents in the attachments section.

13. When all necessary proposal details have been filled in, click "Summary/Submit." Click "Data Validation" at the top of the page.
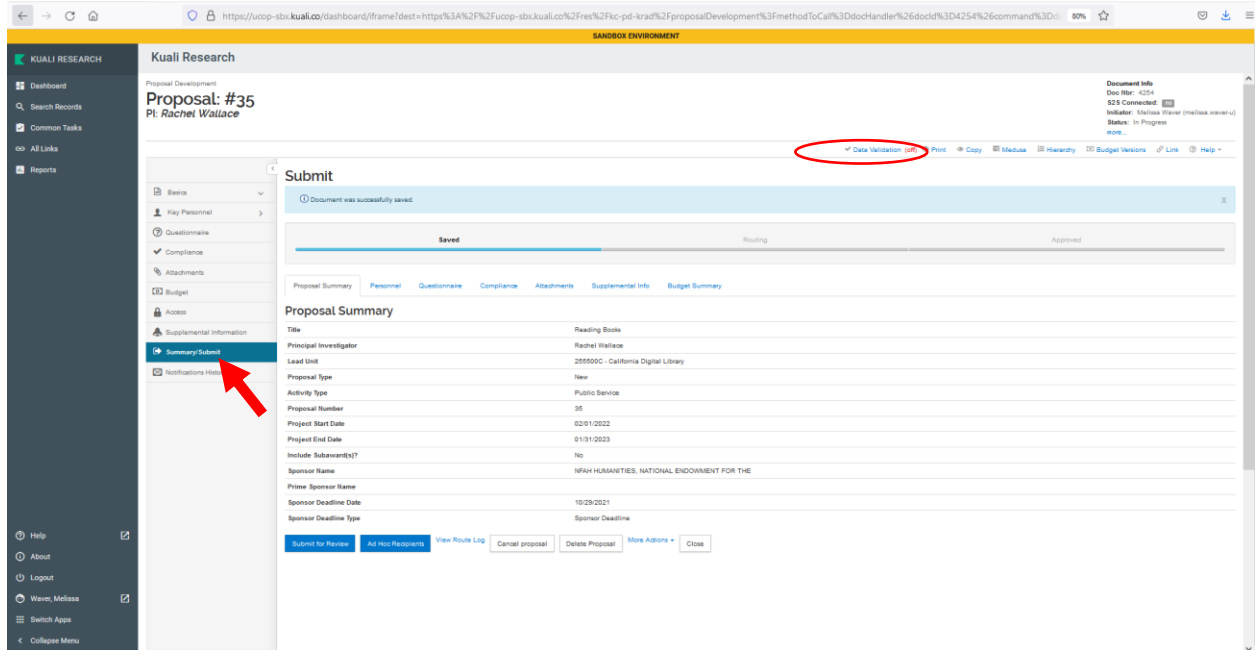
14. The data validation check might find errors. If so, click "Fix It" next to each error to go back and correct the problem.
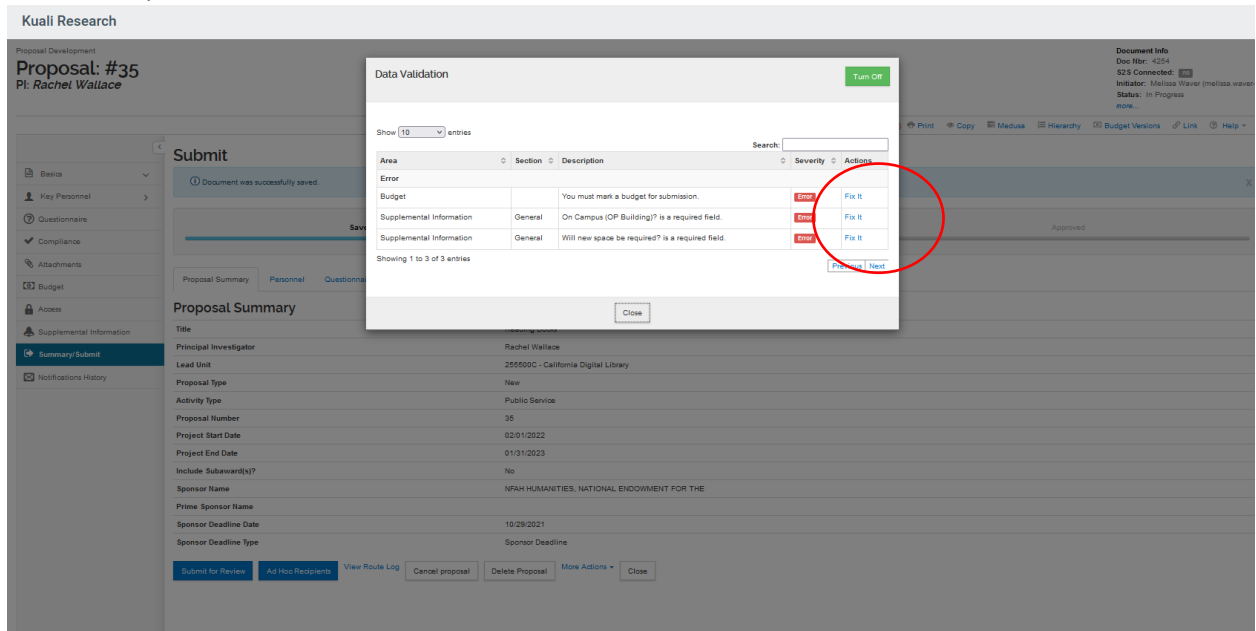
15. When the proposal has been successfully created, email the RPAC C&G Operations Officer (ucopawards@ucop.edu) to let her know that the proposal is ready for initial review.
16. Once the RPAC C&G Operations Officer has completed her review, she will tell you to submit the proposal through Kuali for internal approvals. In the "Summary/Submit" tab, click "Submit for Review." Each approver will then receive an email letting them know that they should log into Kuali to review and approve the proposal. The proposal will then be routed to the next approver until all approvals are complete.
    a. "Ad Hoc Recipients" can be used to route the proposal to someone else for approval, as an FYI, etc.