A. Texas State Kuali Routing

Routing Proposals at Texas State

ORSP utilizes Kuali Research to gather, route and submit proposals in one single system. For the purposes of university approvals, Kuali Research serves as a central database of proposal information, from basic information (sponsor, personnel) to content (narrative, biosketches, human subjects) and finally to budget (requested amount, cost sharing, F&A).

1. The routing component is a central piece in obtaining approvals from the following levels:

   ✓ Principal Investigator
   ✓ Chair(s) for Principal Investigator and any Co-PIs
   ✓ Dean(s) for Principal Investigator and any Co-PIs

   Routing approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilities/space have been discussed with the appropriate people, contributions listed will be met by the department/college unless otherwise approved, that Conflict of Interest requirements have been addressed, and that Sponsored Programs may process the proposal.

2. Once all PI(s), Chair(s), and Dean(s) have approved, routing approval is sent to ORSP for final review and approval. At this stage, the proposal has been cleared for submission to sponsor. ORSP proceeds to work with PI to ensure proposal submission to Sponsor.

Routing Path in Kuali Research

The routing path in Kuali at Texas State is flat, whereby PI, Chair(s), and Dean(s) receive approval notifications at the same time in order to expedite the approval process.

The Routing Path for Centers at Texas State is slightly different, whereby PI, Center Director, and AVPR receive approval notification at the same time.

In both of these paths, ORSP PreAward is notified after these approvals have occurred for their final approval.
B. Proposal Review

Proposal information is summated in the Summary/Submit tab, which reviewers will be automatically redirected to when using the email notification link or the Action List link. The following sections are available in the Summary/Submit tab:

- Proposal Summary
- Attachments
- Personnel
- Questionnaire
- Credit Allocation
- Supplemental Info
- Keywords
- Compliance

Proposal Summary
The proposal summary tab provides the reviewer with basic information regarding the proposal (Title, PI, Activity Type, Department, Project Dates, Sponsor and Deadline Date).

Personnel
The Personnel tab provides the reviewer with information of personnel involved and their roles within the project (PI, Co-PI or Senior Personnel). Information regarding personnel’s university departments will also be included.
Credit Allocation
F&A Percentage allocation will be shown in the Credit Allocation tab. This split is representative of the percentage of the PI and Co-PI’s share as well as Department share only.

Compliance
The Compliance tab provides reviewers with information related to compliance issues associated with the project (Human Subjects, Vertebrate Animals, Biohazards, Export Controls, etc.)

Attachments
The attachments tab will contain all uploaded proposal content, such as Narrative, Biosketch(s), and Budget Justification.

Questionnaire
The questionnaire tab will contain several questions related to the 3 Day Rule, matching funds, and compliance.

Supplemental Info
The supplemental information tab will contain information relating the PreAward Coordinator assigned to the proposal, cost share information, internal proposal summary and the corresponding Higher Education Coordinating Board designation.

Keywords
The keywords tab will contain any key words attached to the proposal content.

C. Proposal Approval or Return

Routing Actions in Kuali

1. Approve: If reviewer accepts the proposal as compiled, he/she will select the Approve option at the bottom of the screen.
2. Return: If reviewer does not accept the proposal or requests a revision, he/she will select the Return option. Routing will stop and return to PreAward for revisions.