Kuali Research

Routing Overview and Approval Process
Routing at Texas State

- Routing at Texas State is **Three-Tiered**
- Second Tier Occurs at One Time (Faculty, Chairs and Deans)
- Approvals Indicate:
  - ✓ PI can Submit Proposal as Requested
  - ✓ Chair & Dean have been notified prior
  - ✓ Compliance Issues are Acceptable
  - ✓ Cost Sharing (if any) are Acceptable
  - ✓ F&A Distribution is Acceptable
  - ✓ ORSP can move forward with Submission
Proposal Routing Notifications: Email Notice

**OVERVIEW**

When a proposal is routed to you for your approval, you will be able to review the proposal and render a decision whether to Approve the proposal or Return it for corrections.

- If the proposal is **Approved** it moves ahead to the next Approval Stop.
- If the proposal is **Returned** it is returned to the Proposal Aggregator to make corrections;

As an Approver for a proposal:

- You will receive an **Action List Reminder** notification by email that a proposal requires your action. AND/OR
- You can access your **Action List** in Kuali Research to view the proposals that require your action.
# Proposal Routing Notification: Action List

**STEP 1: Accessing Action List**
- Login to Kuali Research at [http://www.txstate.edu/research/](http://www.txstate.edu/research/)
- Click on Action List

**STEP 2: Selecting Proposals for Review & Approval**
- Navigate to Items Requiring “Approve” Action Requested
- Click on that line’s ID

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### Action List

<table>
<thead>
<tr>
<th>ID</th>
<th>Type</th>
<th>Title</th>
<th>Route Status</th>
<th>Action Requested</th>
<th>Delegator Date Created</th>
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Proposal Summary Review

<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>
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<tbody>
<tr>
<td><strong>Title</strong></td>
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Proposal Summary: Personnel

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<tr>
<th>Key Person</th>
<th>Role</th>
<th>Unit</th>
<th>Proposal Person Certification</th>
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<tbody>
<tr>
<td>Walter Ellis Horton</td>
<td>Principal Investigator</td>
<td>50000070 - Office of the Assoc VP for Res (Lead Unit) 50000117 - Chemistry and Biochemistry</td>
<td>incomplete (view)</td>
</tr>
<tr>
<td>Michael T Blanda</td>
<td>Co-Investigator</td>
<td>50000070 - Office of the Assoc VP for Res</td>
<td>incomplete (view)</td>
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Proposal Summary: Credit Allocation

### Credit Allocation

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<tr>
<th>Name</th>
<th>F&amp;A Distribution</th>
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<tbody>
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<tr>
<td>50000070 - Office of the Assoc VP for Res</td>
<td>0</td>
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<tr>
<td>50000117 - Chemistry and Biochemistry</td>
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<td><strong>Unit Total:</strong></td>
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<td>Michael T Blanda</td>
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<td>50000070 - Office of the Assoc VP for Res</td>
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<td><strong>Investigator Total:</strong></td>
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Proposal Summary: Compliance

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<tr>
<th>Type</th>
<th>Approval Status</th>
<th>Protocol Number</th>
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Submit:
- Saved
- Routing
- Approved

Buttons:
- Send Adhoc
- Ad Hoc Recipients
- View Route Log
- Recall
- Submit to Sponsor
- More Actions
- Close
## Proposal Summary: Attachments

### Send Authoc
- **Type**: Sponsor Guidance
- **Status**: Complete
- **Description**: Upload Sponsor Guidance Here
- **Uploaded By**: User01, Test
- **Posted Timestamp**: 05/08/2017 09:32 AM

### Project Summary.pdf
- **Type**: ProjectSummary
- **Status**: Complete
- **Uploaded By**: User01, Test
- **Posted Timestamp**: 05/08/2017 10:39 AM

### Project Narrative.pdf
- **Type**: Narrative
- **Status**: Complete
- **Uploaded By**: User01, Test
- **Posted Timestamp**: 05/08/2017 10:39 AM

### Protection Human Subjects.pdf
- **Type**: Other
- **Status**: Complete
- **Description**: Human Subjects
- **Uploaded By**: User01, Test
- **Posted Timestamp**: 05/08/2017 10:39 AM

### References.pdf
- **Type**: Bibliography
- **Status**: Complete
- **Uploaded By**: User01, Test
- **Posted Timestamp**: 05/08/2017 10:39 AM

### Budget Narrative.pdf
- **Type**: BudgetJustification
- **Status**: Complete
- **Uploaded By**: User01, Test
- **Posted Timestamp**: 05/08/2017 10:39 AM

### View Route Log
- **Recall**
- **Submit to Sponsor**
- **More Actions**
- **Close**
Proposal Summary: Questionnaire

Proposal - OSP Questionnaire (Complete)

1. Please type or copy/paste the Sponsor Guidance (guidelines) or RFP for this proposal. An uploaded copy of the guidance can be included in the 'Attachments' tab. If there is no guidance for this proposal, please enter 'N/A':  
   Guidance link should be entered here or N/A if none

2. Have you informed your chair, dean, and/or director of this proposal?:  
   Yes

3. I understand that per UPSS 02.02.01, a completed proposal is due to the Office of Sponsored Programs by 5pm, 3 working days prior to the sponsor deadline:  
   Yes

4. Is additional laboratory space, office space, or renovation of existing space required?:  
   Yes

5. Will University donated dormitory space be required for this program?:  
   No

6. Will equipment requiring a University match be requested?:  
   No

7. Will a new academic program or distance education program be established, or will curriculum changes be required?:  
   No
Proposal Summary: Supplemental Info

Supplemental Info

- Coordinating Board Classification
  - Higher Ed Coordinating Board: LIFE SCIENCES BIOLOG

- Cost Share
  - Cost Center/Fund Number
  - Cost Share Amount
  - Responsible Unit/College

- OSP Summary
  - Executive Summary: This is the 50 Word Summary to describe project

- Proposal Coordinator
  - Proposal Coordinator: Raquel Rust
Proposal Summary: Keywords
Proposal Summary: Budget Summary
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.
Proposal Approve/Return

Routing Actions In Kuali

- **Approve**: Proposal has met approver of Reviewer and will move forward.
- **Return**: Proposal has not been approved and needs revisions or other action.
Final Steps: ORSP Approval

- ORSP will Approve in Kuali Research for Final Approval.
- Proposal docs will be filed and system will mark proposal “Pending” until a Response from Sponsor.