Kuali Research Basics Plus: Proposal Development Viewing

Kuali Research Help Contact: kr-help@umd.edu
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**What is Proposal Development?**

The Proposal Development module contains records of proposals which have been created for routing and submission. Data in the Proposal Development module are entered by users in the Department with the appropriate rights for a particular unit.

This module is open to certain campus users based on specific need and is not open to general campus users as the data contained within this module may be sensitive or proprietary. Investigators listed on the proposal have access to view the record and certify the proposal. Departmental and College Approvers have access to view and approve the proposals.

Access to this module is provided at a unit level based on business needs. Data in this module may not be edited once the proposal has been submitted to the sponsor. No data in the Proposal Development module are included in the Data Warehouse and are not included in any institutional reports.

**Viewing Proposal Development Records**
You can access Proposal Development records by either performing a search or by clicking on the Medusa tab within an Award, Institute Proposal, or Subaward record.

**Searching in Proposal Development**
From the Unit tab, click on the 🔍 to the right of Proposal Development. This will open the Proposal Development Lookup screen.

![Proposal Development Lookup Screen](image)
Accessing Proposal Development from Medusa

You may commonly find yourself within an Award, Institute Proposal, or Subaward while determining you’d like to view the associated Proposal Development Record. This can easily be done without doing a search from the Medusa tab.

In Medusa, click on the Development Proposal link to view the summary information then click on the “Open Proposal” button to open that record in another web browser tab.
Development Proposal Lookup Screen

You have the option of directly searching for Proposal Development records. Using Kuali Research searching techniques, type in your search criteria and click on search. If you click on Cancel, the system will return you to the Welcome screen.

Proposal Number: internal tracking number for proposal, no leading zeros
Proposal Type: type of proposal submission; pull down
Proposal State: routing/approval status; pulldown
Project Title: title of proposal
Proposal Person: search by name of any Senior/Key Person listed on proposal
Principal Investigator: search by name of person with role of PI only
Aggregator: name of person who has rights to create/compile proposal
Participant: not used at UM
Initiator Username: directory ID of proposal creator
Sponsor Deadline Date: date proposal is due to sponsor
Sponsor: sponsor code
Sponsor Name: name of sponsor
Prime Sponsor Code: prime sponsor code
Prime Sponsor Name: name of the originating funding sponsor
Lead Unit: unit code of lead unit
Lead Unit Name: name of lead unit
Award ID: ID of award tied to this record, Renewals or Continuations only
Opportunity ID: funding opportunity ID
Hierarchy Status: not used at UM
Proposal Create Date: date range of when proposal was created (inclusive)
OSP Administrator Username: directory ID of ORA Contract Administrator
Basic searching rules: * is the wildcard character; click on the 🕵️‍♂️ to do a lookup for that particular field. A vertical bar character | may be used as an OR operator within each field that’s not a pull down.

Search will return a results list at the bottom of the Lookup screen. Click on view to open the selected proposal. **NOTE:** Search results will be limited based on the rights of the user. You will not be able to open proposal development records if you do not have rights to access proposals for that lead unit. The actions listed will be limited by the rights of the user and the status of the proposal.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Proposal Number</th>
<th>Proposal Document Number</th>
<th>Proposal Type</th>
<th>Proposal State</th>
<th>Project Title</th>
<th>Tracking ID</th>
<th>Opportunity ID</th>
<th>Opportunity Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>view medusa</td>
<td>35516</td>
<td>1870692</td>
<td>New</td>
<td>In Progress</td>
<td>Genetic Control of Mosquitoes-Applying Protein Prediction and Design to Create ts-Leukals for Genetic Seeding sporozoite vaccine manufacture</td>
<td>NIH Exploratory/Developmental Research Grant Program (Parent R21)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>view medusa</td>
<td>35429</td>
<td>1872978</td>
<td>New</td>
<td>Approved and Submitted</td>
<td>Comparative genomic analysis of specificity to mosquitoes in Metarhizium pengshaense strain for improved biological control</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>view medusa</td>
<td>35029</td>
<td>1871781</td>
<td>New</td>
<td>Approved and Submitted</td>
<td>No need to bite the hand that feeds: Engineering mosquitoes to lay</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click view to open the Proposal Development record or click Medusa to open the proposal on the Medusa tab, which shows shortcuts to all related records.
Reviewing Proposal Summary Information
If you want to quickly and easily access important proposal information navigate to the proposal's Summary/Submit section (bottom left of Proposal Sections). This section organizes important proposal information across tabs that are easy to navigate and review.

Summary/Submit Section
Each tab shows the summary information for that topic (sections). The Route Log shows the routing history including approvals.

Proposal Summary Tab
The Proposal Summary tab provides core, identifiable information.

Personnel Tab
The Personnel Tab shows investigators listed on a proposal, what their role is, and provides links to quickly see how investigators answered certification questions.
**Credit Allocation Tab**
The Credit Allocation tab lists how the credit split has been allocated to each investigator across all of their associated units.

<table>
<thead>
<tr>
<th>Name</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most A Skennit</td>
<td>75</td>
</tr>
<tr>
<td>12115/01 - ESOS Geography</td>
<td>100</td>
</tr>
<tr>
<td>1420103 - VPR-Research Administration</td>
<td>0</td>
</tr>
<tr>
<td><strong>Unit Total:</strong></td>
<td><strong>100</strong></td>
</tr>
<tr>
<td>Sally Egloff</td>
<td>25</td>
</tr>
<tr>
<td>1420103 - VPR-Research Administration</td>
<td>100</td>
</tr>
<tr>
<td><strong>Unit Total:</strong></td>
<td><strong>100</strong></td>
</tr>
<tr>
<td><strong>Investigator Total:</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

**Compliance Tab**
The Compliance Tab will list any Special Review considerations for the proposal and their status. If applicable, other information such as a protocol number, application date, or approval date may also be listed.

<table>
<thead>
<tr>
<th>Type</th>
<th>Approval Status</th>
<th>Protocol Number</th>
<th>Application Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Subjects (25)</td>
<td>Not yet applied</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Attachments Tab**
The Attachment Tab contains collections of all of the attachments in the proposal.
- The Proposal Tab contains any attachments for submittal to the sponsor
- The Personnel Tab contains investigator-specific attachments such as Current and Pending Reports and Biosketches
- The Abstract Tab is not used by UMD and will not contain any information
- The Internal Tab lists all attachments a department would like to retain but not submit directly to the sponsor, for example, the departmental budget spreadsheet, funding opportunity instructions, departmental routing memo.

<table>
<thead>
<tr>
<th>File</th>
<th>Type</th>
<th>Status</th>
<th>Description</th>
<th>Uploaded By</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>narrative.pdf</td>
<td>Narrative</td>
<td>Incomplete</td>
<td>Proposal Narrative</td>
<td>admin, admin</td>
<td>06/02/2017</td>
</tr>
<tr>
<td>letterofsupport.pdf</td>
<td>Other</td>
<td>Incomplete</td>
<td>Proposal Letter of Support</td>
<td>admin, admin</td>
<td>06/02/2017</td>
</tr>
</tbody>
</table>
**Questionnaire Tab**
The questionnaire tab allows you to easily review all questionnaire answers. Depending on the type of proposal you may see different questionnaires displayed in this section for funded agreements, non-funded agreements, or system-to-system proposals.

**Supplemental Info Tab**
The Supplemental Info Tab displays more proposal-specific info including Admin Costs designation, F&A Rate, Type, and Reason as well as other contact information for the budget and sponsor.
Budget Summary Tab
The Budget Summary Tab displays the F&A Rate Type, budgeted costs by category and totals for both direct and indirect costs.

F&A Rate subsection
This F&A Rates subsection shows the predefined institutional rate and applicable rates for this proposal.
### F&A Rates

<table>
<thead>
<tr>
<th>Description</th>
<th>On Campus</th>
<th>Fiscal Year</th>
<th>Start Date</th>
<th>Institute Rate</th>
<th>Applicable Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td>No</td>
<td>2018</td>
<td>07/01/2017</td>
<td>27.50</td>
<td>27.50</td>
</tr>
<tr>
<td>MTDC</td>
<td>Yes</td>
<td>2018</td>
<td>07/01/2017</td>
<td>52.00</td>
<td>52.00</td>
</tr>
<tr>
<td>MTDC</td>
<td>No</td>
<td>2019</td>
<td>07/01/2018</td>
<td>27.50</td>
<td>27.50</td>
</tr>
<tr>
<td>MTDC</td>
<td>Yes</td>
<td>2019</td>
<td>07/01/2018</td>
<td>52.00</td>
<td>52.00</td>
</tr>
<tr>
<td>MTDC</td>
<td>No</td>
<td>2020</td>
<td>07/01/2019</td>
<td>27.50</td>
<td>27.50</td>
</tr>
<tr>
<td>MTDC</td>
<td>Yes</td>
<td>2020</td>
<td>07/01/2019</td>
<td>52.00</td>
<td>52.00</td>
</tr>
</tbody>
</table>

**Description**: describes the type of rate being used  
**On Campus**: if yes, rate is for campus, if no, rate is for off-campus  
**Fiscal Year**: fiscal year of the period  
**Start Date**: start date of fiscal year  
**Institute Rate**: formally negotiated rate for UMD  
**Applicable Rate**: rate that is used for this proposal

### Route Log

Clicking on the “View Route Log” link at the bottom of the Summary section will allow you to review who approved the proposal and when. NOTE: Past proposals that were migrated from Coeus will be missing this information. If you find you require this information, please contact kr-help@umd.edu.
Viewing All Proposal Details

If you cannot find the information you need from the Summary/Submit section you may individually view all segments of a proposal if necessary. Upon opening a proposal the Proposal Details screen is displayed. There are three parts of the screen: the Reference Information Box, the Proposal Sections Side Menu, and the Proposal Toolbar.

Reference Information Box

Shows information about the document for this version of the Proposal Development record.
S2S Connected: did/will this proposal be submitted directly to Grants.gov?
Initiator: user ID of proposal creator
Status: status of the proposal - In Progress: not yet routed; Approval Pending: proposal is being routed

You can click on more... to see more information about the document.

This contains more reference detail information for this development proposal.

Doc Nbr: internal tracking number for this document
Initiator: directory ID of person who created the proposal
Status: current status of the proposal
PI: name of PI assigned to the proposal
Created: date and time proposal was created
Updated: date and time proposal was last updated
Proposal Nbr: internal tracking number for this proposal (note no leading zeroes)
Sponsor Name: name of sponsor that this proposal will be/was submitted to

Click anywhere off the panel to close it.
Proposal Sections Menu

The proposal sections are listed on the left with the subsections under them.

The highlighted proposal section is what is being displayed in the main proposal window.

If a proposal section has a > on the right, it indicates that there are subsections under the section. You can click on the > to expand to see the subsection labels.

If the ▼ is shown, then the subsection labels are displayed. You can click on the ▼ to close the subsection label display.
Proposal Toolbar

Additional information available to be viewed about the proposal is listed across the top of the screen.

Data Validation: Turn on/run Budget specific validations, located at the top of the navigation bar.
Print: Displays and selects the printable materials
Copy: Able to make a copy of this as a new proposal (must have proposal creation rights)
Medusa: Opens the Medusa Window – Award, Institute Proposal, Subcontract and Development proposal links to show the relationship among them. Allows one to move from one module to the next without opening each separate module
Budget Versions: Displays all budget version. Allow to create, finalize and include the budget version of user’s choice on to the proposal
Link: Displays the proposal link
Help: displays the guidebook

Print

The Print function allows you to print various parts of the proposal. The Grant.gov will print the grants.gov forms for this proposal. The Sponsor form packages will print generic forms. Reports is not used at UMD.

Once you’ve expanded the desired section, click on the checkbox under Select for each form you want print. Ignore the Include dropdown.

You can click on Select to select all or none.

When done, click on Create PDF to generate a combined document.
Basics Section
Proposal Details Subsection

Proposal Details
- indicate required fields

Proposal Type: New
Lead Unit: 00001 - University of Maryland
Activity Type: Research, basic
Project Dates: 05/01/2011 - 07/31/2016
Project Title: MRI: Novel Approaches in Computational Science and Engineering Using Heterogeneous Petascale Computing and Visualization Architectures
Sponsor: 000503 - NSF
Prime Sponsor Code:

Proposal type: type of proposal submission

New: An application is submitted for funding for the first time.
Continuation: A non-competing application for additional funding within the previously approved funding period.
Pre proposal: a pre-proposal submission as defined by sponsor
Renewal: (formerly called competing continuation) – Previous years of funding for the project have elapsed. Competing for additional funding to continue project
Resubmission: (formerly called revision or amended application) – Application previously submitted and reviewed by sponsor but not funded. Used for System-to-System applications only.
Revision: (formerly called supplement for NIH) – An application that proposes a significant change in an existing award; change in scope of work, etc

Lead unit - unit number and name of lead unit
Activity type: type of activity that will be performed by this proposal

Basic research: systematic study directed toward fuller knowledge or understanding of the fundamental aspects of phenomena and of observable facts without specific applications towards processes or products in mind
Applied research: research assessing and using some part of accumulated theories, knowledge, methods, and techniques for a specific driven purpose
Development Research: systematic application of knowledge or understanding, directed toward the production of useful materials, devices, and systems or methods including design, development, and improvement of prototype and new processes to meet specific requirements
Clinical Trial: research studying the effectiveness of a particular device/therapy/drug with humans
Training/Instruction: projects, which incorporate teaching as its main objective.
Fellowship: projects which provide a stipend to faculty or students in support of their undirected research or advanced study
IGPA: Intergovernmental Personnel Assignments of personnel on temporary assignment to federal agencies.
**Service/Other:** projects, which involve the performance of work other than instruction/training and research. Examples of such projects are health and community service projects.

**Project Dates:** planned begin and end dates of project

**Project Title:** title of project. This is limited to 200 characters for Grants.gov proposals, some sponsors require shorter titles

**Sponsor:** code and name of sponsor

**Prime Sponsor Code:** code and name of prime sponsor, blank if none

**Keywords:** not used at UMD

**S2S Opportunity Search Subsection**

If the proposal is an S2S proposal, the S2S Opportunity information is viewable here.

**Opportunity Tab**

<table>
<thead>
<tr>
<th>Opportunity ID</th>
<th>KV-MOST-RR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Title</td>
<td>Most IR forms</td>
</tr>
<tr>
<td>Submission Type:</td>
<td>Application</td>
</tr>
<tr>
<td>S2S Revision Type:</td>
<td>select</td>
</tr>
<tr>
<td>CFDA Number</td>
<td>00.000</td>
</tr>
<tr>
<td>Competition Id</td>
<td>RR</td>
</tr>
<tr>
<td>Opening Date</td>
<td>02/02/2025</td>
</tr>
<tr>
<td>Closing Date</td>
<td></td>
</tr>
<tr>
<td>Instruction Page:</td>
<td>Download Instructions</td>
</tr>
<tr>
<td>Schema URL:</td>
<td>View schema</td>
</tr>
<tr>
<td>S2S Provider</td>
<td>Grants.gov</td>
</tr>
</tbody>
</table>

**Opportunity ID:** Grants.gov ID assigned to the opportunity

**Opportunity Title:** title of opportunity, assigned by sponsor

**Submission Type:** type of submission

**S2S Revision Type:** used if the proposal is an S2S revision

**CFDA Number:** Catalog for Federal Domestic Assistance - assigned by agency

**Competition ID:** ID assigned by agency

**Opening Date:** date opportunity was opened

**Closing Date:** date opportunity closes

**Instruction Page:** link to the instructions for this opportunity

**Schema URL:** URL to view schema

**S2S Provider:** Grants.gov
Forms Tab

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Mandatory</th>
<th>Include</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFRI_Project_Type</td>
<td>No</td>
<td>No</td>
<td>Unavailable</td>
</tr>
<tr>
<td>Attachments_1_2V1.2</td>
<td>No</td>
<td>✔️</td>
<td>Available</td>
</tr>
<tr>
<td>HHS_CheckList_2_v1-V2.1</td>
<td>No</td>
<td>No</td>
<td>Unavailable</td>
</tr>
<tr>
<td>HRSA_AENT</td>
<td>No</td>
<td>✔️</td>
<td>User Attached Form</td>
</tr>
<tr>
<td>HRSA_NFLP</td>
<td>No</td>
<td>No</td>
<td>Unavailable</td>
</tr>
<tr>
<td>Key_Contacts</td>
<td>No</td>
<td>No</td>
<td>Unavailable</td>
</tr>
<tr>
<td>NASA_SeniorKeyPersonSupplementalDataSheet-V1.0</td>
<td>No</td>
<td>No</td>
<td>Available</td>
</tr>
<tr>
<td>NSF_CoverPage_1_7-V1.7</td>
<td>No</td>
<td>No</td>
<td>Available</td>
</tr>
<tr>
<td>NSF_SuggestedReviewers-V1.1</td>
<td>No</td>
<td>No</td>
<td>Available</td>
</tr>
<tr>
<td>RR5R424S424B-V1.1</td>
<td>No</td>
<td>No</td>
<td>Available</td>
</tr>
<tr>
<td>RR_Budget_1_4</td>
<td>No</td>
<td>✔️</td>
<td>Available</td>
</tr>
<tr>
<td>RR_S4242_O-V2.0</td>
<td>Yes</td>
<td>Yes</td>
<td>Available</td>
</tr>
<tr>
<td>RR_SubawardBudget10_10_1_4</td>
<td>No</td>
<td>No</td>
<td>Available</td>
</tr>
<tr>
<td>RR_SubawardBudget10_30_1_4</td>
<td>No</td>
<td>No</td>
<td>Available</td>
</tr>
<tr>
<td>RR_SubawardBudget30_1_4</td>
<td>No</td>
<td>No</td>
<td>Available</td>
</tr>
</tbody>
</table>

Based on the opportunity for this proposal, this screen shows the forms that have been selected for the proposal.

**Form Name:** name of form

**Mandatory:** Yes-mandatory, No-optional

**Include:** ignore in view mode

**Description:** description of the content of the form

Submission Detail Tab

Submission details will be available after the proposal is submitted.

If the proposal has been submitted to grants.gov, the submission detail is shown here.
User Attached Forms Tab

<table>
<thead>
<tr>
<th>Description</th>
<th>Namespace</th>
<th>Form Name</th>
<th>File Name</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>HERA</td>
<td><a href="http://apply.grants.gov/forms/HRSA_AENT-V1.0">http://apply.grants.gov/forms/HRSA_AENT-V1.0</a></td>
<td>HRSA_AENT</td>
<td>HRSA_AENT_complete.pdf</td>
<td>Action</td>
</tr>
</tbody>
</table>

If there are any user attached forms, they are listed here.

**Description**: Short description of the form  
**Namespace**: location of the form in grants.gov  
**Form Name**: formal name of form  
**File Name**: name of file that contains the form

The actions pulldown allows you to view the forms in the file format listed for that form.

Delivery Info Subsection

**Submission By**: OSP  
**Submission Type**: Electronic  
**Submission Account ID**:  
**Submission Name & Address**:  
**Number of copies**:  
**Submission description**: grants.gov

Contains information about how the proposal is/was delivered.  
**Submission by**: which unit will submit the proposal, almost always OSP (ORA)  
**Submission Type**: method to be used for submission  
**Submission Account ID/Submission Name & Address, and Number of Copies**: not used at UMD  
**Submission description**: contains Federal submission system if used
## Sponsor & Program Information Subsection

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor deadline</td>
<td>05/01/2017</td>
</tr>
<tr>
<td>Sponsor Deadline Type</td>
<td>Receipt</td>
</tr>
<tr>
<td>Notice of Opportunity</td>
<td>Federal Solicitation</td>
</tr>
<tr>
<td>Opportunity ID</td>
<td></td>
</tr>
<tr>
<td>CFDA Number</td>
<td></td>
</tr>
<tr>
<td>Subawards</td>
<td>true</td>
</tr>
<tr>
<td>Sponsor Proposal ID</td>
<td></td>
</tr>
<tr>
<td>NSF Science Code</td>
<td>Geological and Earth Sciences - Geosciences, Atmospheric, and Ocean Sciences: C.02</td>
</tr>
<tr>
<td>Anticipated Award Type</td>
<td>Grant</td>
</tr>
<tr>
<td>Agency Routing Identifier</td>
<td></td>
</tr>
<tr>
<td>Prev Grants.Gov Tracking ID</td>
<td></td>
</tr>
<tr>
<td>Opportunity Title</td>
<td></td>
</tr>
</tbody>
</table>

Contains proposal submission information related to the sponsor and program.

**Sponsor deadline**: the deadline for the opportunity that this proposal is responding to

**Notice of opportunity**: type of opportunity that this proposal is responding to

**Opportunity ID**: ID of opportunity that this proposal is responding to

**CFDA Number**: for federal submissions, the number identified by the funding opportunity

**Subawards**: true - there is at least one subaward for this proposal; false - no subawards

**Sponsor Proposal ID**: proposal ID assigned by sponsor

**NSF Science Code**: science category based on NSF science codes

**Anticipated Award Type**: type of award PI anticipates will be if awarded

**Agency Routing Identifier**: complete if directed to do so in FOA

**Prev Grants.Gov Tracking ID**: complete if directed to do so in FOA

**Opportunity Title**: title of opportunity
### Organization and Locations Subsection

#### Organizations & Locations

<table>
<thead>
<tr>
<th>Tab</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Organization Tab</td>
<td>University of Maryland information</td>
</tr>
<tr>
<td>Performing Organization Tab</td>
<td>University of Maryland information</td>
</tr>
</tbody>
</table>

#### Applicant Organization Tab

<table>
<thead>
<tr>
<th>Applicant Organization</th>
<th>University of Maryland</th>
</tr>
</thead>
<tbody>
<tr>
<td>421583</td>
<td></td>
</tr>
<tr>
<td>000001</td>
<td></td>
</tr>
<tr>
<td>Organization Name</td>
<td>University of Maryland</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Office of Research Administration</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>3112 Lee Building 7809 Regents Drive</td>
</tr>
<tr>
<td>Address Line 3</td>
<td>College Park</td>
</tr>
<tr>
<td>City</td>
<td>College Park</td>
</tr>
<tr>
<td>State</td>
<td>MD</td>
</tr>
<tr>
<td>Postal Code</td>
<td>20742-5141</td>
</tr>
</tbody>
</table>

#### Performing Organization Tab

<table>
<thead>
<tr>
<th>Performing Organization</th>
<th>University of Maryland</th>
</tr>
</thead>
<tbody>
<tr>
<td>32885</td>
<td></td>
</tr>
<tr>
<td>000001</td>
<td></td>
</tr>
<tr>
<td>Organization Name</td>
<td>University of Maryland</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Office of Sponsored Programs</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>3112 Lee Building</td>
</tr>
<tr>
<td>Address Line 3</td>
<td>College Park</td>
</tr>
<tr>
<td>City</td>
<td>College Park</td>
</tr>
<tr>
<td>State</td>
<td>MD</td>
</tr>
<tr>
<td>Postal Code</td>
<td>20742-5141</td>
</tr>
</tbody>
</table>
**Performance Site Locations Tab**
If there are any off-campus performance sites for three consecutive months, they will be shown here.

**Other Organizations Tab**
If there are any subawardees planned for this proposal, they will be shown here.

You can click on the Organization Name to see more detail about the organization.
Key Personnel Section
Personnel Subsection

Contains the name, type, and certification completion information for each proposal person. When you click on the line, the Personnel Subsection will be displayed for that person.

Details Tab

Proposal Personal Role ID: role assigned to this proposal person
Full Name: full name of proposal person
First Name: first name of proposal person
Last Name: last name of proposal person
Middle Name: middle name/initial of proposal person
eRA Commons User Name: NIH Commons ID
Include in Credit Allocation: true - person is included in DRIF credit allocation, false - person not included
### Organization Tab

<table>
<thead>
<tr>
<th>Details</th>
<th>Organization</th>
<th>Extended Details</th>
<th>Degrees</th>
<th>Unit Details</th>
<th>Person Training Details</th>
<th>Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organization</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Address: <a href="mailto:casilva@mail.umd.edu">casilva@mail.umd.edu</a></td>
<td>Office Location: 2136 LeFrak Hall</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Phone: 301-405-4050</td>
<td>Address Line 1: University of Maryland</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax:</td>
<td>Address Line 2: 2136 LeFrak Hall</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pager:</td>
<td>Address Line 3:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile:</td>
<td>City: College Park</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Title: Graduate Assistant II</td>
<td>County:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Directory Title:</td>
<td>Country: United States</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Unit: 1281501</td>
<td>Postal Code: 20742-0001</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Division: University of Maryland</td>
<td>State: MD - MARYLAND</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary Office Location:</td>
<td>Salary Anniversary Date:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty: false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Address and unit information for the proposal person. Information comes from PHR.

**Effort**: not used at UMD

### Extended Details Tab

<table>
<thead>
<tr>
<th>Details</th>
<th>Organization</th>
<th>Extended Details</th>
<th>Degrees</th>
<th>Unit Details</th>
<th>Person Training Details</th>
<th>Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Extended Details</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Personal Information</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age by Fiscal Year:</td>
<td>Race:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KcPersonId: 112000222</td>
<td>Is Handicapped: false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Handicap Type:</td>
<td>Veteran: false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Veteran Type:</td>
<td>Hes Visa: false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visa Code:</td>
<td>Visa Type:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visa Renewal Date:</td>
<td>Directory Department: BSOS-Geography</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is School Accraed: false</td>
<td>Is on Sabbatical: false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Id Provided:</td>
<td>Id Verified:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country of Citizenship:</td>
<td>Citizenship Type: UnkNoVSN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**KC Person ID**: university ID of key personnel

**Directory Department**: primary department of proposal person from PHY

**Remainder of items**: not used at UMD

### Degree Tab

Not used at UMD
Unit Details Tab

Displays the unit that the key personnel is associated. You can click on the unit number to view more detail about the unit.

Person Training Details Tab

Not used at UMD

Certification Tab

Show answers provided by the PI to certification questions. You can scroll through to see all of the questions and answers.
Credit Allocation Subsection

<table>
<thead>
<tr>
<th>Name</th>
<th>Recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carlos Edibaldo Silva</td>
<td>75</td>
</tr>
<tr>
<td>1281591 - BSOS-Geography</td>
<td>100</td>
</tr>
<tr>
<td>Unit Total:</td>
<td>100</td>
</tr>
<tr>
<td>David Paul Roy</td>
<td>25</td>
</tr>
<tr>
<td>1281591 - BSOS-Geography</td>
<td>100</td>
</tr>
<tr>
<td>Unit Total:</td>
<td>100</td>
</tr>
<tr>
<td>Investigator Total:</td>
<td>100</td>
</tr>
</tbody>
</table>

The Combined Credit Split Panel shows how the DRIF credit split is allocated per PI and department. Each Unit Total will equal 100 - the percent entries for individual units assigned to the PI must add up to 100. The Project Persons Total will equal 100 - the percent entries listed with each Investigator’s name must add up to 100. If all fields are zeroes, the Credit Split information has not been entered.

Compliance Section

The Compliance section lists special review items for this proposal. Special review items include: Human Subjects, Animal Subjects, Use of Chemicals, Use of Radioactive Materials, Export Control Review, Conflict of Interest, Financial Conflict of Interest, etc.
Attachments Section
Attachments are split into a number of tabs.

<table>
<thead>
<tr>
<th>Attachments</th>
<th>Proposal (2)</th>
<th>Personnel (2)</th>
<th>Abstracts (0)</th>
<th>Internal (3)</th>
<th>Notes (0)</th>
</tr>
</thead>
</table>

**Proposal**: Attachments which will be sent to the sponsor as part of the proposal.

**Personnel**: Only used in S2S proposals, this contains Biosketches and Current and Pending reports if required by the solicitation.

**Abstracts**: Not used at UMD

**Internal**: Attachments which will remain at UM. The UM abstract and departmental budget can be found in this section. For non-S2S proposals, all attachments will be in this section.

**Notes**: Not used at UMD.

Within each tab, click on the pdf file name to view the attachment.

**Proposal Tab**

<table>
<thead>
<tr>
<th>Proposal (1)</th>
</tr>
</thead>
</table>

Add attachments to this proposal

<table>
<thead>
<tr>
<th>File</th>
<th>Type</th>
<th>Status</th>
<th>Description</th>
<th>Uploaded By</th>
<th>Posted Timestamp</th>
</tr>
</thead>
<tbody>
<tr>
<td>narrative.pdf</td>
<td>Narrative</td>
<td>Complete</td>
<td>Proposal Narrative</td>
<td>admin, admin</td>
<td>07/28/2017 12:04 PM</td>
</tr>
</tbody>
</table>

Proposal attachments that will be sent to the sponsor.

**File**: name of uploaded file, click on it to view

**Type**: description of type of file

**Status**: status of completion; either Complete or Incomplete

**Description**: description of contents of file

**Updated By**: directory ID of person who last uploaded the file

**Posted Timestamp**: date and time the file was last uploaded
**Personnel Tab**

Attachments related to the personnel assigned to the proposal

**File**: name of uploaded file, click on it to view

**Person**: proposal person for this file

**Type**: description of type of file

**Description**: description of contents of file

**Updated By**: directory ID of person who last uploaded the file

**Posted Timestamp**: date and time the file was last uploaded

---

**Internal Tab**

Internal contains attachments that are for UMD use only.

**File**: name of uploaded file, click on it to view

**Type**: description of type of file

**Status**: status of completion; either Complete or Incomplete

**Description**: description of contents of file

**Updated By**: directory ID of person who last uploaded the file

**Posted Timestamp**: date and time the file was last uploaded
Questionnaire Section

Questionnaire displays the set of questions completed. The questionnaire(s) required to be completed for Proposal Development depend on the anticipated award type and if the proposal will be submitted system to system.
You can scroll through to view the questions and answers.
**Budget Section**
Contains details on the budget.
Summary budgets are required for all proposals. Detailed budgets are required for S2S proposals. All proposals will have a Departmental Budget attached in the Attachments section.

**Summary Budget Panel**

<table>
<thead>
<tr>
<th>Name</th>
<th>Version</th>
<th>Direct Cost</th>
<th>F&amp;A</th>
<th>Total</th>
<th>Start</th>
<th>End</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final Budget</td>
<td>1</td>
<td>200,000.00</td>
<td>104,000.00</td>
<td>304,000.00</td>
<td>01/01/2019</td>
<td>12/31/2019</td>
<td>Incomplete</td>
</tr>
<tr>
<td>S2S Detail Budget</td>
<td>2</td>
<td>171,309.00</td>
<td>83,776.65</td>
<td>255,085.65</td>
<td>01/01/2018</td>
<td>12/31/2019</td>
<td>Incomplete</td>
</tr>
</tbody>
</table>

This shows the summary budget information. Only one budget can be marked as For Submission. Click on the name of the budget to see the budget details.

**Name**: name assigned at the time the budget is created

**Version**: the version of this budget

**Direct Cost**: total direct cost requested

**F&A**: total F&A requested

**Total**: direct and F&A summed together

**Start**: proposed start date for this project

**End**: proposed end date for this project

**Status**: status of the budget

**Comments**: any comments typed in by the budget creator for this budget
Budget Details

When you click on the name of the budget, the system will display the detail budget sections on the left of the screen. You can click on Return to proposal (upper left) to return to the proposal detail.

You can click on each section to see the detail of that section. If the section label has a > on the right, it means there are subsections in that section.

Periods and Totals Section

Displays the period totals for the budget.

- **Period Start Date**: Proposed start date for this period
- **Period End Date**: proposed end date for this period
- **Months**: proposed duration in months for this period
- **Total Sponsor Cost**: total amount requested from sponsor for this period
- **Direct Cost**: proposed direct cost for this period
- **F&A Cost**: proposed F&A cost for this period
- **Unrecovered F&A**: unrecovered F&A for this period
- **Cost Sharing**: UMD share of the cost for this period
- **Cost Limit**: if entered, the amount the request is limited to
- **Direct Cost Limit**: if entered, the amount the direct cost is limited to
Rates Section
The Rates section displays the rates that are available for use in this budget. You can click on each tab to see the available rates for that item.

Institute Rate: formally negotiated rate for UMD
Applicable Rate: rate that is used for this proposal

Research, basic F&A Tab - Shows the rates that are available to be used for this proposal.

Fringe Benefits Tab - Shows the fringe benefits rates that are available to be used for this proposal.

Inflation Tab - Shows the inflation rates available to be used for this proposal.
Personnel Costs Section

Personnel Costs has two subsections. Click on each one to see the detail for each.

**Project Personnel Subsection**

List of personnel assigned to the project.
- **Person**: name of person assigned
- **Job Code**: job category selected for this person
- **Appointment Type**: type of appointment (Reg, 10 month, 12 month, summer)
- **Based Salary**: salary base for this proposal (not necessarily the person’s actual salary)

**Assign Personnel to Periods Subsection**

Shows personnel and effort for each period.
- **Person**: Appointment type, fringe rate, and name of person
- **Start**: start date for this period
- **End**: end date for this period
- **Effort**: percentage planned effort for this period for this person
- **Charged**: percentage charged for this period for this person (if less than effort, this implies cost sharing)
- **Period Type**: type of period for charging
- **Requested Salary**: multiplication of base salary X effort X period type
- **Calculated Fringe**: multiplication of Requested Salary X fringe rate for this person
Non-Personnel Costs Section

<table>
<thead>
<tr>
<th>Description (1)</th>
<th>Description (2)</th>
<th>Quantity</th>
<th>Total Base Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>C Communication Equipment</td>
<td>Communication Field Equipment</td>
<td>1</td>
<td>6,000.00</td>
</tr>
<tr>
<td>F Agriculture Supplies</td>
<td>Agriculture supplies for field research</td>
<td>1</td>
<td>620.00</td>
</tr>
<tr>
<td>Travel</td>
<td>Travel to Conference in Chicago, IL</td>
<td>1</td>
<td>2,000.00</td>
</tr>
</tbody>
</table>

Shows non-personnel costs for the period.

**Description (1):** budget category for item  
**Description (2):** description of item  
**Quantity:** should always be 1  
**Total Base Cost:** cost of item

Subawards Section

Click on View PDF to see the complete subaward budget.

If there are any subawards on this proposal and it is an S2S proposal, the subaward budgets can be viewed here. When you click on Details, you will see the Subaward Details popup.
Institutional Commitments Section

There are two types of Institutional Commitments - Cost Sharing and Unrecovered F&A. Click on each one to see the detail.

Cost Sharing Subsection

If present, shows cost sharing commitment for this budget.

- **Period**: shows period that commitment will be funded
- **Percentage**: not used by UMD
- **Source Account**: unit ID providing the funds for the cost share
- **Amount**: amount source account is providing
  - **Total Allocated**: funds currently accounted for
  - **Total Unallocated**: funds that still need to be accounted for
- **Unit Details**: unit ID

Unrecovered F&A Subsection

Shows any unrecovered F&A for this budget. Unrecovered F&A is for situations where the F&A rate for a given item is below the rate for the entire project. While there must be an amount here to match the unrecovered F&A, UMD does not use this information.

Project Income Section

Shows anticipated project income. If blank, there is none.

- **Budget Period**: period that the income is anticipated
- **Description**: description of anticipated income
- **Project Income**: amount of anticipated income
Modular Section

Shows the detail for a modular budget. Modular budgets are used only for certain NIH proposals. If modular budget is not used, this will be blank.

Budget Notes Section

Any budget notes are displayed here. Budget notes are for internal use only and are not submitted to the sponsor.

Budget Summary Section

Summary of information provided for this budget listed by budget section and then totals.
Access Section
Displays who has access to the proposal.

<table>
<thead>
<tr>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
</tr>
<tr>
<td>admin</td>
</tr>
</tbody>
</table>

Supplemental Information Section
Displays other information about the proposal.

- **Creation Date**: the date the proposal was created
- **Created by**: directory ID of creator
- **IDC Rate Type**: the type of IDC rate is used
- **Sponsor Contact Name**: name of sponsor contact
- **Sponsor Email**: email of sponsor contact
- **Sponsor Phone**: phone # of sponsor contact
- **Budget Contact Name**: name of budget contact
- **Budget Contact Email**: email of budget contact
- **Budget Contact Phone**: phone # of budget contact
- **Pick up contact name**: not used
- **Pick up contact phone**: not used
- **IDC Rate**: percentage rate for IDC
- **IDC Reason**: reason that rate is used
- **NSPIRES USERNAME**: if an NSPIRES proposal, username of PI
- **Sub Unit**: used by CICS unit only
- **Admin Costs Included**: describes if admin costs are included as direct costs and why

Still Have Questions?
Please contact Kuali Research Help: kr-help@umd.edu