Kuali Research: Investigator Certification Guide

Kuali Research Help Contact: kr-help@umd.edu
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Reviewing the Proposal Before Certifying

Before certifying, you should review the proposal development record. You will need to navigate to the proposal itself in order to view the proposal.

1. Open the email notification from Kuali Research with the subject line: “Certification is required for Proposal: [Title of the Proposal]”

2. Copy the Proposal Number from the Certification email.

3. Searching for your Proposal
   You may find and open proposals in three ways:
   1.) Within Dashboard Cards
   2.) Search Records Page
   3.) Proposal Search in Commons Tasks

1.) Searching for Your Proposal within the Proposals Not Routing Dashboard Card
   Noting the proposal number from the email, go to the Kuali Research Dashboard Homepage and find the proposal in your “Proposals Not Routing” card.

Filter
You can use the filter to quickly get to the proposal.
2.) Searching for your Proposal using the Search Records Page
You can search for Proposals by Proposal Number or Doc Number for example by using the Search Records page. If you are having trouble distinguishing the correct record you may narrow your results by searching within specific categories like “Development Proposal Number” or showing additional columns.

3.) Searching for your Proposal from the Common Tasks
Click Common Tasks > click Search Proposals under Proposal Development

This will open the Development Proposal Lookup screen. Type in your proposal number and press Enter.
4. Once you have found your proposal, click on the Proposal. This will bring up the Proposal Details screen.

The Summary/Submit section of the proposal allows you to quickly view the significant details of the proposal within the same section.
● Proposal Summary Tab: Basic details (Title, PI, Lead Unit, Prop #, Dates, Sub?, Sponsor, Deadline)
● Personnel Tab: All personnel listed on the project, their role, and their certification answers
● Credit Allocation Tab: DRIF/Credit Split allocation
● Compliance Tab: All Special Review items that apply to this proposal
● Attachments Tab: All Proposal, Personnel, and Internal attachments are available to be viewed
● Questionnaires Tab: All questionnaire questions and answers

Supplemental Info Tab: Info such as Admin Costs, IDC Rate, Type, & Reason, Sponsor & Budget Contacts.

● Budget Summary Tab: Displays budget details by period and totals, personnel and non-personnel costs.

Click on Close to close out of the proposal and return to the Kuali Research Dashboard home screen. Go back to your Notification email.
Certification for the PI

1.) On the Certification Request Email, click on the “Proposal Number” link.

2.) If you are not yet logged in, when the certification page opens, you will be prompted to do so. Click on UMD - College Park.

3.) Please answer ALL questions, then click the [Certify Answer] button. If you click on the [Cancel] button before clicking [Certify Answers], the system will not save your responses and will return you to the Kuali Research Dashboard home screen.
Check Box Certifications

- All check boxes must be checked, or the certification will be considered incomplete.

When you have answered all of the questions and click the [Certify Answers] button, a pop-up window will appear stating “All questions answered” and provide you with three options:

- [Save and Exit] This will save all of your answers and exit the questionnaire.
- [Exit without save] This will not save any of your answers and exit the questionnaire.
- [Return To Questions] This will return you back to the questionnaire.

If you did not answer all of the questions and click the [Certify Answers] button, you will see: “Please answer all questions in order to certify proposal” to inform you that you have not finished. Click [Return to Questions] to finish answering the questionnaire. If you are not ready to finish, you may save your answers and come back to the questionnaire later by clicking on [Save and Exit]. You may return back to the questionnaire by clicking on the link in the certification email.

4.) Print Certification
You may print the certification once you are done. The investigator’s physical signature is NOT required/needed.

5.) Close Certification
- To close the Certification, you may close your browser by closing the browser window.
- Please do NOT click Cancel. This will cancel your certification answers.