Kuali Research

Routing Overview and Approval Process

Routing at Texas State

ORSP (PreAward) Completes Proposal & Submits Into Routing

PI, Chair(s), & Dean(s) Simultaneously Approve

ORSP (PreAward) Provide Final Approval

- 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
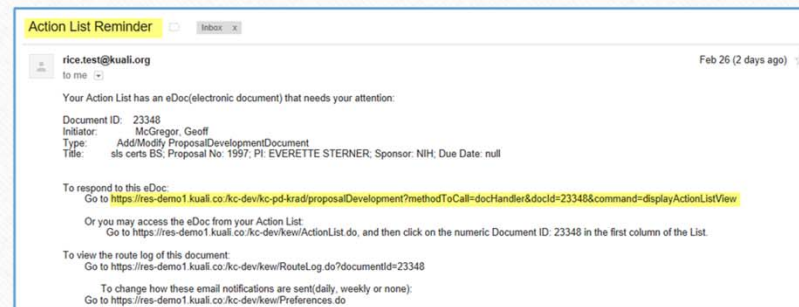
Proposal Routing Notifications: Email Notice

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/

- Click on Action List

STEP 2: Selecting Proposals for Review & Approval

- Navigate to Items Requiring "Approve" Action Requested

- Click on that line's ID

Proposal Summary Review
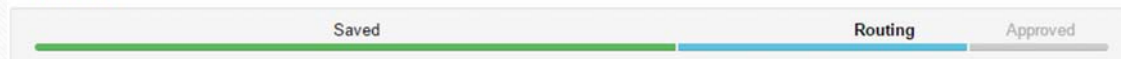
Proposal Summary: Personnel

Proposal Summary: Credit Allocation

Proposal Summary: Compliance

Proposal Summary: Attachments

Proposal Summary: Questionnaire

Proposal Summary: Supplemental Info

Proposal Summary: Keywords

Proposal Summary: Budget Summary

Proposal Route Log

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

- **<u>Approve:</u>** Proposal has met approver of Reviewer and will move forward.

- **<u>Return:</u>** 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

Award ID:		**Status:**	Pending
Proposal Type:	New	**Activity Type:**	Research
Initial Contract Admin:		**Proposal Create Date:**	2017-05-17
Updated By:	testuser01	**Last Update:**	2017-05-17 12:31:08.0
Project Title:	Testing Kuali Research		