Kuali Research: Adding a Co-Applicant

This document details the process of adding a Co-Applicant to a Proposal in Kuali Research.

NOTE: This document is a companion to the **Creating a simple pre-award submission** material available on the Research Systems page. Please refer to the video and procedure document there for the high-level procedure; this document provides specific detail on the co-applicant piece only.

If you have co-applicants, they will be listed on your Sponsor proposal document, which you include as an Attachment. So, in the Questionnaire, if you say yes, you have co-applicants, this acts as a flag to your Approver to look in the proposal document for further details.

This is all you need to do in terms of your co-applicants, UNLESS the following scenario applies to your proposal: your co-applicant is an SFU employee AND has made a commitment to provide resources to the project.

These commitments need to documented for review by your approvers – your Chair or Dean – as the type of commitments made are under their purview – for example, space, time, access.

If this scenario is true for you, you need to add the co-applicant in the **Personnel** section, and provide more information in the **Questionnaire** section.

In the **Personnel** section, you should see yourself as the PI.

1. To add a co-applicant:
   a) Click **Add Personnel**.
   b) In the **Add Personnel** dialog, ensure the **Employee** radio button is selected.
   c) Enter the Last name of the co-applicant in the **Last Name** field and click **Continue**.
   d) In the results that display, choose the person you want to add and click **Continue**.
   e) In this next screen, choose **Co-Applicant**, and click **Add Person**. The co-applicant now displays in the **Personnel** section.
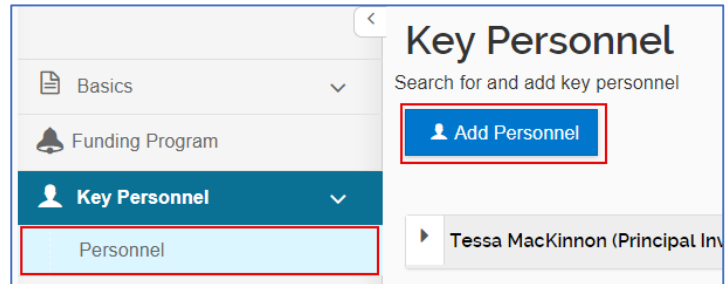
2. In the **Questionnaire** section, for question 11, respond to the following questions:
   a) 11: Choose **Yes**, your proposal does include Co-applicants.
   b) 11.1: Choose **Yes** to indicate they are from SFU.
   c) 11.1.1: Choose **Yes** to indicate your co-applicants are providing additional resources for the project.
   d) 11.1.1.1: Select all resources your co-applicant is providing to the project.
   e) 11.1.1.2: Choose **Yes** if the co-applicant has received approval from their Dean/Chair for the noted resources. As noted in the question, add any supporting documentation for this information in the Attachments section; for example, a PDF of the email exchange where the resource was promised.
   f) 11.1.1.2.1: If the answer to question 10.1.1.2 is **No**, this question asks for your acknowledgement that the commitment from your co-applicants must be approved before participating. Click **I acknowledge**
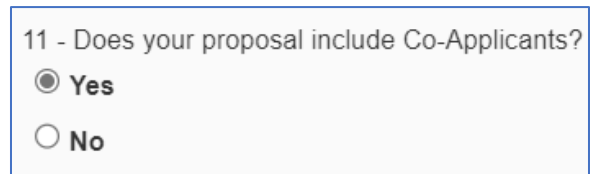
3. Click **Save and Continue**.

In summary, you only need to add a co-applicant if they are an SFU employee and have promised some sort of resources to support your project; all other co-applicants should be described in your Sponsor Proposal document that you are uploading to the **Attachments** section.