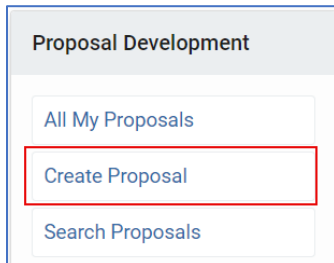


## Kuali Research: Submitting a Grant for Internal Approval (Create Proposal)

This document details the process of submitting a grant for internal approval. In the Kuali system, the process is called Creating a Proposal. This process was formerly known as the Signature Sheet.

Access Kuali by navigating to [sfu.kuali.co](http://sfu.kuali.co).

To access Kuali Research, click the **Research Home** card. Under **Common Tasks**, under the **Proposal Development** group, click **Create Proposal**:



On the **Create Proposal** page, complete all fields marked with a red asterisk:

The image shows the 'Create Proposal' form with the following fields and their requirements:

- Proposal Type:** \* select (dropdown menu)
- Lead Unit:** \* select (dropdown menu)
- Activity Type:** \* select (dropdown menu)
- Project Dates:** \* mm/dd/yyyy to mm/dd/yyyy (two date input fields)
- Project Title:** \* (text input field)
- Sponsor:** \* (text input field with search icon)
- Principal Investigator:** \* (text input field with search icon)
- Anticipated Award Type:** \* select (dropdown menu)

- In the **Proposal Type** field, click the drop-down and make the appropriate choice
- In the **Lead Unit** field, type in the name of your department and select it when it displays in the drop-down list. Once you have saved the proposal, this field cannot be edited. The list you can see in the drop-down menu is the back-office view of SFU’s dept structure. If you’re in a non-departmentalized faculty, see the [help file](#) to find the correct code.
- In the **Activity Type** field, make the appropriate choice from the drop-down list.
- In the **Project Dates** fields enter the start and end dates for the project.
- In the **Project Title** field, enter or copy the title of the proposal you are submitting
- In the **Sponsor** field, enter the name of your funding agency; start typing until you find the agency you’re looking for, and select it.
- In the **Principal Investigator** field, click the magnifying glass icon; typically, it’s easiest to enter the last name and search/select the person you’re looking for.
- In the **Anticipated Award Type** field, choose either **G-Grant** or **C-Contract**; ignore all other choices.

After all fields are completed, click **Save & Continue**. If any fields are blank, an error message displays and you need to complete the field to be able to save the proposal.

After you save the information, your proposal now has a number. You can use this number to search for the proposal and track its progress.

Proposal Development

**Proposal: #101**

PI: *Tessa MacKinnon*

The page displays a menu on the left; you need to enter the required information in each section to ensure the proposal is complete before submitting.

NOTE: Click **Save and Continue** after completing each section.

1. The **Proposal Details** page is a summary of information you've just entered. Any field except **Lead Unit** can be edited up to the submission of the proposal. Leave the **Prime Sponsor Code** field blank.
2. In the **Deadline & Other Information** section, from the **Deadline Type** drop-down, make your preferred choice.

Most proposals are a fixed deadline, in which case you would choose the **Sponsor Deadline**. The **Internal Target** option is only for limited submission grants.

In the **Deadline** field, enter the deadline from the funder or funding agency, if known. This helps approvers sort proposals by urgency so it is useful information to have. The **Anticipated award type** field is populated from your earlier entry.

3. In the **Funding Program** section, type in the name of the program you are applying for.
4. The **Key Personnel** section is populated with the PI information you already entered. If you are the only PI, there is nothing more to do in this tab. If you have a co-investigator from SFU who has promised you a resource to be used in your project, enter their name, related information, and choose a role for them.
5. In the **Internal (sig sheet) Budget** section you only need to enter high level information about your budget; you will add your detailed budget later in the **Attachments** tab, so you do not need to recreate it here.

Click **Add Budget** and enter a name for the budget. Click the **Start internal approval budget** radio button, and click **Create Budget**.

In the table, the only columns you need to complete are the **Direct Cost** and **F&A Cost**; F&A stands for Facilities and Admin costs, which at SFU means overhead. For a Discovery Grant, the tri-agency policy applies and the F&A cost should be zero. Enter the amount of funding you're applying for in each year.

Do not enter anything in any other column. In this section, only focus on the **Periods & Totals** table, and ignore all other tabs on this page. When finished, click **Complete Budget**.

A pop-up displays asking if the budget is complete and if you want to submit it to the sponsor; note, this is fixed language in the system; you are just submitting it to the internal workflow. Check the box and click **OK**. Click **Close** or **Return to Proposal**. The budget line is green when it is ready for approval.

**Basics**
▼

Proposal Details

Deadline & Other Information

Funding Program

Key Personnel
>

Internal (sig sheet) Budget

Questionnaire

Compliance


Attachments

Summary/Submit

6. In the **Questionnaire** section, respond to each of the questions; if you want more information about a field, click the info icon.
- Question 1: indicate what currency your budget is in.
  - Question 2: indicate if the funds you are applying for will be in part used for PI fees, additional compensation, or salary recovery; if this is the case, it must be approved by your Chair or Dean before you enter the Proposal information.
  - Question 3: indicate if the funds you are applying for will be in part used for Release Time Stipend (RTS) or teaching release or course buyout for yourself; if this is the case, it must be approved by your Chair or Dean before you enter the information.
  - Question 4: indicate if SFU's overhead policy is being followed.
  - Question 5: indicate if you require any additional resources for your project and select all that apply.
  - Question 6: indicate if your proposal is accompanied by an SFU support letter or promise of contribution by the OVPRI.
  - Question 7: indicate if any of your collaborators are international.
  - Question 8: indicate if your research is being conducted on SFU premises.
  - Question 9: indicate if you are working with indigenous peoples, cultures, or knowledge systems.
  - Question 10: indicate if requiring any support from any SFU core facilities services.
  - Question 11: indicate if you have any SFU co-applicants who have committed to providing resources on the project. Because your co-applicants are listed in your attached proposal, there is no need to replicate them here.

**Budget Questions**

1 - Is the above budget in CAD currency?



 **Yes**

7. In the **Compliance** section, indicate what compliance is required for your project; NOTE: completion is not necessary until the actual research begins.

If you have no compliance requirements, you need to state this explicitly, as this is a required field. Click **Add compliance entry**, and from the **Type** drop-down list, choose **None**. In the **Approval Status** field, choose **Not Applicable**, and click **Add Entry**.

8. In the **Attachments** section, you need to upload your **Sponsor Budget** and **Sponsor Proposal** documents; you can do this as two different attachments or as one combined document (**Sponsor Combined Proposal & Budget**). Click **Add** to upload an attachment. In the dialog, choose the **Type**, select the **Status**, add a **Description** if needed, and click **Choose File** to navigate to where the file is saved.

The documents must have enough information for your chair or dean to make their decision.

9. The final tab is **Summary/Submit**. On this tab you can do a final review of all the information you have entered on any of the preceding tabs and make edits changes as needed. Once you have reviewed everything, click **Submit for Review**.

If there are any errors or warnings, they will display in the data validation screen. Errors must be fixed before the final submission, but you can submit with warnings.

**Data Validation** Turn Off

Show  entries Search:

Area	Section	Description	Severity	Actions
<b>Warnings</b>				
Sponsor & Program Info		Sponsor deadline date has not been entered.	Warnings	Fix It

Showing 1 to 1 of 1 entries Previous Next

Submit With Warnings Close

- 10. On the next screen, if you are the named PI, click **NO** on the dialog asking if you would like to receive future approval requests.  
If you say yes, you will immediately have to approve the proposal before it moves to anyone else in the queue.

**Please Select** ✕

Do you want to receive future approval requests?

No Yes

Your proposal will now be routed for review and approval. If you want to check the status of your proposal, you can click **View Route Log** at any time.