## Approving Research Proposals via Kuali Research

### BYU Kuali Routing

1. PI completes proposal and submits into routing 5 Days before deadline
2. ORCA reviews/works with PI to make any needed adjustments
3. Chair reviews and approves. If PI and Co-PI(s) are in different departments, each department chair will approve simultaneously
4. Associate Dean reviews and approves
5. ORCA submits or authorizes PI to submit
6. AAVP Reviews and Approves

### 1. ACCESSING PROPOSALS

#### A. Via Email Notification

From: orca@byu.edu <orca@byu.edu>
Sent: Monday, October 28, 2019 11:14 PM
To: Jason Jay
Subject: Kuali Research Action - Proposal - APPROVE - PI: Seth Bybee - Due Date: 11/30/2019 - Lead Unit: 0991 - Sponsor: Merit Medical Systems, Inc. - Title: Awesome Biological

Please complete the APPROVE action for Seth Bybee in Proposal for "Awesome Biological".
Your timely action is requested.
Failure to act when an approval is requested will stop routing.

To review the requested action: Document #9697
https://byures.kuali.co/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=9697&command=displayActionListView

Or, to see all actions requested: Action List
https://byures.kuali.co/res/kew/ActionList.do, and then click on the numeric Document ID: 9697 in the first column of the List.

Action Item sent to jayj4

#### B. Via Kuali Research Dashboard – byures.kuali.co
2. REVIEWING PROPOSALS

The link will navigate to Summary/Submit tab, with a summary of each proposal section across the summary screen. The following sections are available for review:

- Proposal Summary
- Personnel
- Compliance
- Budget Summary – pay attention to any proposed cost sharing
- Attachments
- Questionnaire
- Supplemental Info

3. APPROVE OR RETURN

Once proposal has been reviewed and is ready for approval, click on Approve at bottom of screen. Or, if a proposal needs revisions, click on Return. This will send the proposal back to the PI for further action.

To View Route Log of Past, Current and Pending Approvers

- Click on View Route Log
- Actions Taken denote past approvers/approvals
- Pending Action Requests denote current approvals pending PI/Chair/Dean Action