Office of Research and Sponsored Programs
University Massachusetts Boston
100 Morrissey Boulevard, Boston, MA 02125-3393
P 617.287.5370 | www.umb.edu/ORSP

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Kuali Build Internal Grant Application Guide

I. PURPOSE

Kuali Build Forms Guide for using the Internal Grant Application

II. SCOPE

The Internal Grant Application is used to apply for internally awarded grant programs offered by UMass Boston. This document provides guidance on how to complete the application, for program specific information, please refer to the related resources below.

III. Related Resources

UMB Internal Funding Programs
Kuali Build Guide in the ORSP Kuali (Kuali Build section) – General use and navigation of Kuali Build
ORSP Contacts by Department

IV. Definitions

See the Internal Grant Programs section on the Internal Funding Programs page linked above for more information.

Proposal Development Grant Program
- Supports pilot research directly relevant to the preparation and writing of a competitive proposal for submission to an external funding opportunity.

Joseph P. Healey Research Grant Program
- Supports research and scholarly activities that enhance the quality of academic and intellectual life at the university. All forms of research and scholarly activities are eligible through this grant program.

Public Service Grant Program
- Promotes community research through faculty and community partnerships.

V. Form Guidance

The Internal Grant Application includes information at the beginning of the form to help orient applicants. This document walks through all components of the form, providing guidance on how to complete each section. For general Kuali Build navigation and use, see the Kuali Build guide referenced above. For Internal Grant Program specific guidelines, see Internal Funding Programs linked above.

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Using the Application Form

Anyone wishing to apply for any of the Internal Grant Programs must submit their application using this form.

- Application Initiation
  - Either the applicant or their Department Research Administrator (DRA) or unit level support staff can initiate the application.
- Application Editing
  - Your application may be saved, you do not need to complete your application in one sitting.
  - The application initiator and anyone identified as the PI, DRA, or Support Staff will have edit access to the application until it is submitted.

Form Navigation

When the form is initiated, you will begin on the Start Here page. ***Once you have selected the Internal Grant Mechanism you are applying for, additional fields and pages will become available.***

You may navigate through the pages using the lefthand navigation menu or by clicking the Next and Back action buttons on the right.

These pages will become visible once the grant being applied has been selected.

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Start Here page

Select your unit support staff from the list

This allows you to pick the unit level support person you work with so they can assist you in preparing your application.

- Select from the dropdown list.
- If your unit support person is not listed, save your application and contact Virginia.Maki@umb.edu to request they be made available to select.

Select DRA Lead

Select the DRA Team Lead for your area from this list. Note – some areas are still rolling onto the DRA structure, all areas are listed on the Contact Us by Department page with a DRA Lead identified.

- Select from the dropdown list.
- See the Contact Us by Department ORSP webpage to find your DRA Lead.
  - They verify the unit level approver selected is in line with the PI's home unit.

Internal Grant Mechanism

Select the Grant Program you are applying for. Options may vary annually and are available in this dropdown menu on the form. Views links to the Internal Grant Program Guidelines for detailed information about the different programs being offered.

Once this selection is made, additional fields and pages will become available.

PI Name

Use the person lookup to select the PI Name. This list draws from a list of active UMB employees, begin typing any part of their name in the field and select from the returned names. The person's home unit as captured in HR Direct will automatically fill in.

- The Unit Level Approval field entry selection must match the PI home unit.

PI Biosketch

Add the PI's Biosketch as a file upload. A template is linked on the form and in the guidelines.

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PI Current and Pending Support

Add the PI's Current and Pending Support as a file upload. A template is linked on the form and in the guidelines.

Unit Level Approval

Select the approver group that matches the PI's home unit as captured from HR Direct through adding the PI Name. This pulls in the unit and parent unit level approver from Kuali Research Proposal Development (Kuali PD) into the form Workflow.

Does your application include additional Key Personnel?

Select Yes or No. If Yes is selected, options will be made available to select from. Note – Key Personnel includes any additional Multi-PIs, Co-PIs, or Collaborators.

If Yes is selected:

Key Person Affiliation

Checkbox for UMass Boston and/or Non-UMass Boston personnel to be added – Select all that apply. Tables will populate to allow adding Key Personnel to the application.

UMass Boston Key Personnel

Adds Key Personnel that are UMass Boston active employees, click the + Add Another button for each additional person being added. Fields for each person:
- Keyperson Name: Select from list by typing the name
- Keyperson Role: Select from dropdown
- Biosketch: Upload file, a template is linked on the form
- Current and Pending Support: Upload file, a template is linked on the form

Non-UMass Boston Collaborators

Adds Key Personnel from outside the university, click the + Add Another button for each additional person being added. Fields for each person:
- Collaborator Name: Type in the person's full name
- Collaborating Organization: Type in the person's organization name
- Collaborator Email: Type in the person's email address
- Collaborator Role: Describe their role
- Biosketch: Upload file, a template is linked on the form
- Current and Pending Support: Upload file, a template is linked on the form

Budget page

Add budget lines for your proposal. Allowable budget lines available in the dropdown menu are based on the funding mechanism selected on the form.

NOTE – The Other budget category is subject to approval.

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Total Budget Amount

The total budget amount must not exceed the Maximum Award Amount specified in the grant guidelines. This amount is noted in the table header and is referenced in the guidelines.

Narratives page

Add the Project Narrative and Abstract following the instructions in the guidelines.

Project Narrative

Upload a file – Instructions here are specific to the Grant Mechanism selected on the Start Here page.

Abstract

Abstracts are shorter in length than Project Narratives, there are two options for adding your Abstract, either directly typed in the application or uploaded as a file.

Select the option you prefer and complete the section that populates on the application.

Other Attachments page

Here you have an opportunity to include additional attachments following the instructions in the guidelines.

Select Yes or No.
- If you select yes;
  - A table becomes available to upload an attachment and enter a description.
  - Click the + Add Another to upload additional attachments.

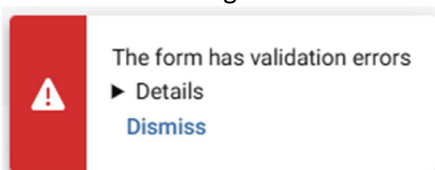## Submission and Next Steps page

This section includes an overview of the review process and information about how to manage and award should your proposal be funded. This ensures you understand the obligations associated with this program.

Action Needed: Click the Submit button in the upper right corner of the form

Validation Errors

An error message will appear if the required fields on the form are incomplete. If this happens, review the form and complete any field you may have missed. Required fields are marked with a red asterisk.
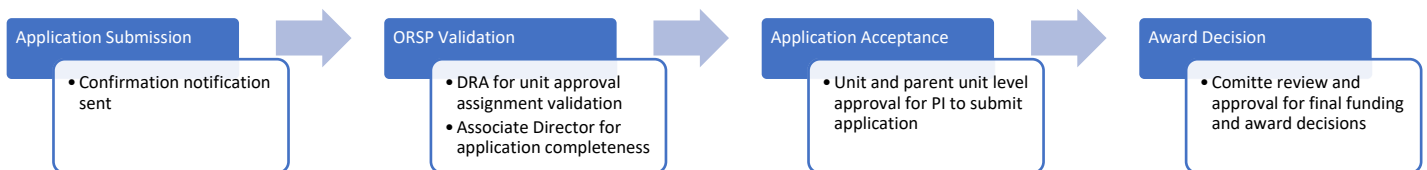
Example of an error message:

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The Pages menu on the left will alert you to which pages contain the validation errors.

Once all required fields have been completed, you should be able to complete the submit action.

Workflow

Below is an overview of the worfklow steps for the Internal Grant Application. Notifications are sent by the Kuali system through the Application Acceptance step. Confirmation of the form submission as well as a notification of application acceptance are included in this process. Review Committee final funding and award decisions are communicated separately.

Application Submission	ORSP Validation	Application Acceptance	Award Decision
• Confirmation notification sent	• DRA for unit approval assignment validation • Associate Director for application completeness	• Unit and parent unit level approval for PI to submit application	• Comitte review and approval for final funding and award decisions

Approving – Unit Level

Unit level approval is required for the PI's home unit. This is inclussive of unit and parent unit, e.g. College Department and College Dean.

For additional instructions on how to complete approvals within Kuali Build, please see the Kuali Build Guide linked above in the Related Resources section.

Approval Notifications

Approvers receive an automated email from Kuali Build when they have an approval task to complete. A reminder email will be sent by the system every 3 days until their approval task is completed. The email includes instructions and an attestation.

Unit Approval Considerations

Carefully review the application and approve only if it aligns with your unit's strategic initiatives and you are prepared to accept full fiscal and administrative responsibility for the investigator's actions on the proposal as outlined in the guidelines.

DRA Validations

The main purpose of the DRA review is to ensure the Unit/Department Approver selected on the application is accurate and matches the PI's home unit in HR. The PI's home unit is automatically populated on the application.

- DRA compares the PI Home Unit field to Unit Approver selected to validate they represent the same unit.
- DRA Leads may also review the application for completeness as a preliminary check before the application routes to unit level approvers.

Troubleshooting/Questions

Technical questions involving how to complete the form or viewing the status of your application – Please review the Kuali Build guide linked above or reach out to ORSP Training and Education at ORSPTraining@umb.edu

Policy or process questions, please review the guidelines and guides linked above or reach out to your DRA contact, see the ORSP Contacts by Department page.