

# KC - Kualo Coeus Grant Entry

*Content is updated as we are notified of changes from the KC team.*

The KC system is used for grants submission. This manual will walk you through entering proposals into KC, using the grant proposal **PD#28924**. These directions are for an internal MSU Extension process. For additional technical help on entering your grant in the KC system, contact: [kchelpdesk@msu.edu](mailto:kchelpdesk@msu.edu) or **517.355.2000**

Log into KC here using your MSU Net ID and password. <https://kc.researchadmin.msu.edu/kcprd/portal.do>  
You should automatically be on the Researcher tab. To start a new Proposal Development Document (PD), click Create Proposal or you can search and copy from a previous document by using the search by PI or by PD number. Let the MSUE Grant Services team [MSUE.GrantServices@campusad.msu.edu](mailto:MSUE.GrantServices@campusad.msu.edu) know when your document is ready for review or if you have any issues/questions.

**IMPORTANT!** When working in KC, make sure to **SAVE** in every tab. Also, if you need to close, do not just close the browser. After saving, use the “close” button at the bottom of your screen. If you do not exit properly, others will not be able to access your proposal.

## Quick Information:

- Panels are the horizontal sections that can be shown or hidden.
- Tabs are the different parts of the PD that can be selected at the top of the page.
- The \* is a “wildcard”. It tells the system to look for anything before or after that symbol, depending on where you placed it next to a search word. For example, search \*enn\* and your results will include Jennifer or Benny.

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## Proposal Tab

In order to save your Proposal Development Document and receive a Proposal Number, these items must be filled in. All but one can be edited later. Whenever working in KC, make sure to save often. The **save** button is at the bottom.

**Proposal type:** Generally, select new

**Lead Unit:** Should be automatic (**cannot be edited later on**)

**Activity type:** Varies between research, education, etc.

**Project Title:** Unique to project

**Sponsor Deadline Type:** Select Deadline Date if agency has a hard deadline; select No Deadline Date if not

**Sponsor Deadline Date:** Unique to RFP

**Sponsor Code:** To find your sponsor, use the search tool. Use the \* wildcard before and after the first few letters or words of the Sponsors Name in the box and hit search. Scroll down to view your results. On the left next to correct sponsor, click 'return value' to bring it into your proposal. IF you cannot find your sponsor, contact Ann or Deb as they may have to request that a new sponsor be created.

**Project Start Date:** Unique to project

**Project End Date:** Unique to project

Select **SAVE** and the system will generate a Proposal Number. This is the PD# we use for our files.

Proposal Development Document ?		Initiator: nichar55	Created: 10:11 AM 11/07/2017				
		Sponsor/S2S: MSU-PROJECT GREENE/None	PI: Nikki Rothwell				
Proposal	S2S	Key Personnel	Special Review	Custom Data	Abstracts and Attachments	Questions	Budget Versions
Permissions	Proposal Summary	Proposal Actions	Medusa				

expand all collapse all  
\* required field

Document Overview hide

<b>* Description:</b>	Proposal Number: 28924; PI: Nikki Rothwell; Sponsor: MSU-PROJECT GREENE	<b>Explanation:</b>	
<b>Organization Document Number:</b>			

Required Fields for Saving Document hide

<b>Proposal Number:</b>	28924	<b>* Sponsor Code:</b>	018650 MSU-PROJECT GREENE
<b>* Proposal Type:</b>	New	<b>* Project Start Date:</b>	07/01/2018
<b>* Lead Unit:</b>	10058940 - EXT AG AGRIBUSINES	<b>* Project End Date:</b>	06/30/2019
<b>* Activity Type:</b>	Research		
<b>* Project Title:</b>	Modifying the Landscape to Reduce Spotted Wing Drosophila (SWD) Populations in Michigan Orchards.		
<b>* Sponsor Deadline Type:</b>	Deadline Date		
<b>Sponsor Deadline Date:</b>	01/08/2018		

Institutional Fields Conditionally Required

<b>Award ID:</b>	
<b>Original Institutional Proposal ID:</b>	

Sponsor & Program Information show

Organization/Location show

Keywords show

save reload close

**Additional panels on the Proposal Tab – not required prior to saving the first time to get your PD number**

**Sponsor & Program Information Panel:**

- Target Date:** Don't need to enter if you have a sponsor deadline date entered above or if your sponsor does not have a deadline.
- Sponsor Name:** Auto-filled with information from the Sponsor Code above.
- Prime Sponsor ID:** Use this field only if we are not the ones directly submitting the proposal to the agency. For example, if we are a sub to Purdue, we would put Purdue as the Sponsor Code above and USDA as the Sponsor Name here. Use the same search function as above.
- Opportunity Title:** Title of RFP. May auto-fill once you enter the Opportunity ID.
- Sponsor Deadline Time:** RFP Submission time – usually 5 pm, some 11:59 pm
- Notice of Opportunity:** Usually select **non-federal solicitation** – Some grants are Internal, etc.
- Does proposal have Subawards:** Must answer Y or N or you will get a validation 'error'

The screenshot shows a web-based form interface with several panels. At the top is the 'Document Overview' panel, which includes a 'hide' button and a table with fields for 'Description', 'Organization Document Number', and 'Explanation'. Below this is the 'Required Fields for Saving Document' panel with a 'show' button. The main section is the 'Sponsor & Program Information' panel, which is currently expanded and contains a 'hide' button. This panel includes a grid of fields: 'Target Date' (01/08/2018), 'Sponsor Name' (MSU-PROJECT GREENEEN), 'Prime Sponsor ID' (empty), 'Sponsor Deadline Time' (5:00PM), 'Notice of Opportunity' (Internal), 'CFDA Number' (empty), 'Opportunity ID' (empty), 'NSF Science Code' (select), 'Sponsor Div Code' (empty), 'Sponsor Proposal ID' (empty), 'Anticipated Award Type' (select), 'Agency Routing Identifier' (empty), 'Does this proposal include subaward(s)?' (No), 'Sponsor Program Code' (empty), 'Prev Grants.Gov Tracking ID' (empty), and 'Opportunity Title' (Project GREENEEN). Below the main panel are 'Organization/Location' and 'Keywords' panels, each with a 'show' button. At the bottom of the form are three buttons: 'save', 'reload', and 'close'.

**Organization/Location Panel:**

If using off campus indirect rate, you must include at least one location in **Performance Site Locations**, which is the county usually associated with your office location. If you know the congressional district you can add it, but if not that's ok. Select the search icon and use the Organization field with \*wildcards\* to search for counties, then select 'return value' next to correct location to bring it into proposal. Make sure to click the add button on the right in order to save that site. If the project takes place in multiple counties, you can add another line for various additional counties in Michigan by just typing in the Add line and clicking add; but you must list at least one county by name first.

Organization/Location hide

**Applicant Organization**

Michigan State University Michigan State University  
426 Auditorium Road, Room 2 East Lansing, MI 48824-2245

show Congressional Districts

**Performing Organization**

Michigan State University Michigan State University  
426 Auditorium Road, Room 2 East Lansing, MI 48824-2245

show Congressional Districts

**Performance Site Locations**

	Add:	Address	Actions
	(Select)	(Select)	add
1	NW Michigan Hort Station	NW Michigan Hort Station 6686 Center Hwy Traverse City, MI 49684-0000	delete

show Congressional Districts

**Other Organizations**

	Add:	Address	Actions
	(Select)		add

Keywords show

### Keywords Panel:

If your program has an international component, you will need to add at least one country as a keyword.

Document Overview hide

**Document Overview**

* <b>Description:</b>	Proposal Number: 28924; PI: Nikki Rothwell; Sponsor: MSU-PROJECT GREEN	<b>Explanation:</b>	
<b>Organization Document Number:</b>			

**Required Fields for Saving Document** show

**Sponsor & Program Information** show

**Organization/Location** show

**Keywords** hide

**Keywords**

	Add:	Description	Actions
	(select)		

save reload close

### Permissions Tab:

Whoever initiates the proposal is automatically an **Aggregator**. In order for us to help you, please add **Ann Smith (User ID – annsmith)** and **Deb Richardson (user ID – richar55)** as aggregators as they need to have writing, budgeting and routing access. You must select name and role and then select add. When copying proposals over – Permissions do not come forward, so set up the permissions each time. You can set up other individuals to whom you might want to give access as well.

Permissions Proposal Summary Proposal Actions Medusa

expand all collapse all  
\* required field

Assigned Roles hide

Assigned Roles view permissions

Viewer:

Budget Creator:

Narrative Writer:

Aggregator: Ann Smith; Debra Richardson; Jennifer Zelinski; Nikki Rothwell

approver:

Delete Proposal:

View Institutionally Maintained Salaries:

University Advancement Admin:

OVRPGS Administrator:

Users hide

Users ?

Add:	* User Name	Full Name	Unit #	Unit Name	Role	Actions
	<input type="text"/>				select <input type="text"/>	<input type="button" value="add"/>
1	annsmith	Ann Smith	10058282	MSUE DIR OFF	Aggregator	<input type="button" value="edit role"/> <input type="button" value="delete"/>
2	richar55	Debra Richardson	10058282	MSUE DIR OFF	Aggregator	<input type="button" value="edit role"/> <input type="button" value="delete"/>
3	goodr100	Jennifer Zelinski	10057513	LAND MANAGEMENT	Aggregator	<input type="button" value="edit role"/> <input type="button" value="delete"/>
4	rothwel3	Nikki Rothwell	10058940	EXT AG AGRIBUSINES	Aggregator	<input type="button" value="edit role"/> <input type="button" value="delete"/>

### Key Personnel Tab:

To start, do an Employee Search for the PI name, return selected, select Principle Investigator, and click 'add person'. Repeat this step for each Co-PI, Co-Investigator, and Key person. For **Co-PI** you must select Co-Investigator from the drop down and then a box will pop up for you to select "Co-PI". For each **Key Person**, you will need to fill in the blank box. You can state that person's role on the project: Evaluator, Educator, etc.

After the second person is added after the PI, you will see green arrows next to their roles. You can use these arrows to change how the people show up on the Grants.gov package, if applicable.

### Unit Contacts Panel

**Under Units contacts on this tab, you should find a sync all button.** Select that, and as long as the correct lead unit is on the proposal then all the correct unit contacts should be pulled in with their appropriate roles. You will be asked a question regarding this when you hit the button, and just select yes.

### Combined Credit Split Panel:

All columns must total 100 at the bottom. These 3 columns will be broken out separately below following the full page view. The names are just copied beside each column so that you can follow how each person is calculated.

Proposal Development Document Initiator: richar55 Created: 10:11 AM 11/07/2017  
Sponsor/S2S: MSU-PROJECT GREENE/None PI: Nikki Rothwell

\* Unsaved changes will be lost.

\* required field

Add Key Person

\*Person:   \*Proposal Role:

Principal Investigator is a required field prior to submission. Only one PI is allowed.

Nikki Rothwell Principal Investigator

Larry Gut Co-Investigator

Emily Pochubay Co-Investigator

Combined Credit Split

Combined Credit Split			
	F&A Allocation	Post Award Unit	Space
<b>Nikki Rothwell</b>	63.00	100.00	63.00
10057940 - EXT AG AGRIBUS MABR	45.00	0.00	45.00
10058940 - EXT AG AGRIBUSINES	55.00	100.00	55.00
<b>Unit Total:</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>
<b>Larry Gut</b>	12.00	0.00	12.00
10002268 - ENTOMOLOGY	10.00	0.00	10.00
10057268 - ENTOMOLOGY MABR	25.00	0.00	25.00
10058268 - ENTOMOLOGY CES	65.00	100.00	65.00
<b>Unit Total:</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>
<b>Emily Pochubay</b>	25.00	0.00	25.00
10058940 - EXT AG AGRIBUSINES	100.00	100.00	100.00
<b>Unit Total:</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>
<b>Totals</b>			
<b>Investigator Total:</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>

Unit Contacts (5)

Central Administration Contacts (0)

**F&A Allocation Column (1<sup>st</sup> column to calculate).** If you are splitting across several investigators, you must determine the individual effort (or time spent by individual on the project) and then total that effort (**Example from PD#28924**)

PI	5% effort	take 5/8 = 63%	Top gray box = 63
Co-I	1% effort	take 1/8 = 12%	Top gray box = 12
Co-I	<u>2% effort</u>	take 2/8 = 25%	Top gray box = 25
	<b>8 TOTAL</b>		

Combined Credit Split	
Combined Credit Split	
	F&A Allocation
<b>Nikki Rothwell</b>	<b>63.00</b>
10057940 - EXT AG AGRIBUS MABR	45.00
10058940 - EXT AG AGRIBUSINES	55.00
<b>Unit Total:</b>	<b>100.00</b>
<b>Larry Gut</b>	<b>12.00</b>
10002268 - ENTOMOLOGY	10.00
10057268 - ENTOMOLOGY MABR	25.00
10058268 - ENTOMOLOGY CES	65.00
<b>Unit Total:</b>	<b>100.00</b>
<b>Emily Pochubay</b>	<b>25.00</b>
10058940 - EXT AG AGRIBUSINES	100.00
<b>Unit Total:</b>	<b>100.00</b>
<b>Totals</b>	
<b>Investigator Total:</b>	<b>100.00</b>

**Post Award Unit column (2<sup>nd</sup> Column) – 100% always goes to PI unit – in top gray box**

Do not break up the 100% across the units as is done in F&A and in the Space Column. For each individual, assign 100% in the unit that has the largest paid percentage. In Larry Gut’s case, Entomology CES has the largest paid percentage, for there is a 100% under his name next to Entomology CES.

	Post Award Unit
<b>Nikki Rothwell</b>	<b>100.00</b>
10057940 - EXT AG AGRIBUS MABR	0.00
10058940 - EXT AG AGRIBUSINES	100.00
<b>Unit Total:</b>	<b>100.00</b>
<b>Larry Gut</b>	<b>0.00</b>
10002268 - ENTOMOLOGY	0.00
10057268 - ENTOMOLOGY MABR	0.00
10058268 - ENTOMOLOGY CES	<b>100.00</b>
<b>Unit Total:</b>	<b>100.00</b>
<b>Emily Pochubay</b>	<b>0.00</b>
10058940 - EXT AG AGRIBUSINES	100.00
<b>Unit Total:</b>	<b>100.00</b>
<b>Totals</b>	
<b>Investigator Total:</b>	<b>100.00</b>

**Space column (Column 3):** This column mirrors the F&A allocation column even if a faculty member has a split appointment. Splits remain broken out in the same way.



	Space
<b>Nikki Rothwell</b>	<b>63.00</b>
10057940 - EXT AG AGRIBUS MABR	45.00
10058940 - EXT AG AGRIBUSINES	55.00
<b>Unit Total:</b>	<b>100.00</b>
<b>Larry Gut</b>	<b>12.00</b>
10002268 - ENTOMOLOGY	10.00
10057268 - ENTOMOLOGY MABR	25.00
10058268 - ENTOMOLOGY CES	65.00
<b>Unit Total:</b>	<b>100.00</b>
<b>Emily Pochubay</b>	<b>25.00</b>
10058940 - EXT AG AGRIBUSINES	100.00
<b>Unit Total:</b>	<b>100.00</b>
<b>Totals</b>	
<b>Investigator Total:</b>	<b>100.00</b>

### Special Review Tab:

This tab is only for if you have one of the following items. If you do not, you may skip it.

- Human or animal subjects
- International activities
- Additional space allocations
- Export Control issues

Proposal Development Document ?

<b>Initiator:</b> richar55	<b>Created:</b> 10:11 AM 11/07/2017
<b>Sponsor/S2S:</b> MSU-PROJECT GREENE/None	<b>PI:</b> Nikki Rothwell

[Proposal](#) [S2S](#) [Key Personnel](#) [Special Review](#) [Custom Data](#) [Abstracts and Attachments](#) [Questions](#) [Budget Versions](#)  
[Permissions](#) [Proposal Summary](#) [Proposal Actions](#) [Medusa](#)

[expand all](#) [collapse all](#)  
 \* required field ?

Special Review ▼ hide

Special Review	* Type	* Approval Status	Protocol Number	Application Date	Approval Date	Expiration Date	Exemption #	Actions
<b>Add:</b>	<input type="text" value="select"/>	<input type="text" value="select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	E1 E2 E3	<input type="button" value="add"/>
		Comments: <input style="width: 100%;" type="text"/>						

## Custom Data Tab:

This tab is used **if there is no paid PI salary on your proposal**. On the Proposal panel in this tab select the “show” button, then add the following under voluntary cost share info: “PI salary will covered by department funds.” This language is required whether the cost share is required or voluntary.

The screenshot shows the 'Proposal Development Document' interface. At the top, there are fields for 'Doc Nbr: 1514326/', 'Status: In Progress', and 'Copied from Document Id: 150/25/'. Below these are 'Initiator: nichar55', 'Created: 10:11 AM 11/07/2017', 'Sponsor/S2S: MSU-PROJECT GREENE/None', and 'PI: Nikki Rothwell'. A navigation bar includes tabs for 'Proposal', 'S2S', 'Key Personnel', 'Special Review', 'Custom Data', 'Abstracts and Attachments', 'Questions', 'Budget Versions', and 'Permissions'. The 'Custom Data' tab is active. Below the navigation bar, there are buttons for 'expand all', 'collapse all', and '\* required field'. A modal window titled 'Proposal' is open, showing 'Full Group Name: Proposal' and a text input field for 'Voluntary Cost Share info:' containing the text 'PI Salary will be covered by department funds'. At the bottom of the modal are 'save', 'reload', and 'close' buttons.

## Abstracts & Attachments Tab:

Only S2S uses the “Proposal Attachments Panel” (grants.gov Submissions). We use the **Internal Attachments** panel.

### Proposal Attachments Panel:

Only for grants.gov submissions.

### Personnel Attachments Panel:

If you are required to add a CV, bio, or other document related to the personnel of your grant, you would add it here.

### Internal Attachments Panel:

**We use the Internal Attachments panel and must include the following:**

Use the **\*Attachment Type** column and choose the drop down menu to choose the type and upload the attachments using the “Choose File” button. Minimally required attachments are below:

- *RFP solicitation*
- *Budget Justification*
  - If it includes the Scope of Work, make a note of that in the description box
- *Scope of Work* – unless it is already incorporated in the Budget Justification
- *Full proposal* – **OSP wants a copy of the full proposal that is eventually submitted.** You can add a dummy document as the attachment if it is not finished, but if you don’t add the finished/final proposal before it’s accepted by OSP, it will not be able to be added via KC; it will have to be emailed to OSP after the fact.

Proposal Development Document Doc ID: 10195207 Status: In Progress Copied from Document ID: 10076

Initiator: richar55 Created: 10:11 AM 11/07/2017  
 Sponsor/S2S: MSU-PROJECT GREENE/None PI: Nikki Rothwell

Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions Budget Versions  
 Permissions Proposal Summary Proposal Actions Medusa

expand all collapse all  
 \* required field

Proposal Attachments (0) show

Personnel Attachments (0) show

Internal Attachments (1) hide

**Add Internal Attachments** ?

	Posted Timestamp	Uploaded By	* Attachment Type	Description	* File Name	Actions
<b>Add:</b>			select: <input type="text"/>	<input type="text"/>	<input type="text"/> Browse...	<input type="button" value="add"/>
1:	11/07/2017 10:11 AM	Richardson, Debra	Sponsor Solicitation	RFP (blank)	RFP 2018.pdf	<input type="button" value="view"/> <input type="button" value="replace"/> <input type="button" value="delete"/> <input type="button" value="view/edit rights"/>

Abstracts (0) show

Notes (0) show

### Abstracts Panel

You do not need to use this panel.

### Notes Panel

This where Ann and Deb add notes that the budget has been reviewed by MSUE prior to sending to OSP for review.

Proposal Development Document Initiator: richar55 Created: 10:11 AM 11/07/2017

Sponsor/S2S: MSU-PROJECT GREENE/None PI: Nikki Rothwell

Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions Budget Versions  
 Permissions Proposal Summary Proposal Actions Medusa

Document was successfully reloaded.

expand all collapse all

Proposal Attachments (0) show

Personnel Attachments (0) show

Internal Attachments (1) show

Abstracts (0) show

Notes (0) hide

**Notes** ?

	Posted Timestamp	Author	* Note Topic	* Note Text	Actions
<b>add:</b>			<input type="text"/>	<input type="text"/>	<input type="button" value="add"/>

## Questions Tab:

### Grants.gov S2S Questionnaire Panel

Grants.gov S2S questions only used for Federal government solicitations. Federal solicitations use an identifying number that will pull in other specific forms. We use the Standard Proposal Questionnaire Panel for other proposals. See below.

### Standard Proposal Questionnaire Panel

We use standard questions for all proposals except Federal government solicitations.

- There are descriptions for the questions if you look to the right of each questions you will see a “**More Information**” link that you can select and it will drop in some descriptive language for you to review.
- Pay attention to International question because if you answer yes, you are required to add a country code on the proposal tab under key words.
- For most Extension grants, the last 3 questions are “yes” – so if you’re uncertain – please select the more information and read the descriptions provided to be sure you are answering correctly.

Proposal Development Document <span>?</span>		Initiator: richar55	Created: 10:11 AM 11/07/2017				
		Sponsor/S2S: MSU-PROJECT GREENE/None	PI: Nikki Rothwell				
Proposal	S2S	Key Personnel	Special Review	Custom Data	Abstracts and Attachments	Questions	Budget Versions
Permissions	Proposal Summary	Proposal Actions	Medusa				

[expand all](#) [collapse all](#)  
\* required field ?

Grants.gov S2S Questionnaire hide

No conditions were met for questions in this questionnaire. print

hide Questions

Standard Proposal Questionnaire (Complete) hide

hide Questions print

Does this project involve human subjects? More Information...  
 Yes  No

Does the project involve human blood/materials/fluids? More Information...  
 Yes  No

Does this project involve vertebrate animals? More Information...  
 Yes  No

Does the project involve recombinant DNA? More Information...  
 Yes  No

Does the project involve pathogens/biohazards? More Information...  
 Yes  No

Does the project involve hazardous/regulated chemicals? More Information...  
 Yes  No

Does the project involve radioisotopes? More Information...  
 Yes  No

Does the project involve stem cells or stem cell lines? More Information...  
 Yes  No

Have patent or copyright commitments been promised to the sponsor? More Information...  
 Yes  No

Is proprietary/privileged information included in the application? More Information...  
 Yes  No

Is this a Limited Submission proposal? More Information...  
 Yes  No

### PLEASE BE SURE TO REVIEW THE MORE INFORMATION ON THE LAST 3 QUESTIONS ASKED:

These are new questions that were not included in the old transmittal – see below the questions and definitions:

Do you anticipate that some or all of your project work will occur outside of the main MSU campus?

10129 : Do you anticipate that some or all of your project work will occur outside of the main MSU campus?

Yes No

More Information... Does the project include community outreach and/or engagement activities? (select the More Information link for additional guidance)

10130 : Does the project include community outreach and/or engagement activities? (select the More Information link for additional guidance)

Explanation : Outreach/engagement occurs when a person's research, teaching, or service activity significantly engages that person's scholarly or professional expertise with communities and/or organizations outside the academy with the direct goal of improving outcomes for those who live and work in them. That is, outreach/engagement is scholarly activity conducted for the direct benefit of audiences external to the academy: for example, non-traditional students, government agencies, industrial firms and associations, health and welfare organizations, preK-12 schools, labor organizations, and the like. For additional information visit the following website: <https://oemi.msu.edu/Default.aspx?ReturnUrl=%2f>.

Yes No

More Information... Does the project involve Food-related Activities? (select the More Information link for additional guidance)

10131 : Does the project involve Food-related Activities? (select the More Information link for additional guidance)

Explanation : Definition of "Food-related Activities": Projects that relate to food, agriculture, sustainability, preventing or eradicating disease, and/or promoting health through diet, nutrition, safety and security for plant, animals, or humans. Examples include but are not limited to: - plant and animal breeding and production - fisheries - plant and animal health, disease and pest management - food safety, security and policy - food supply, packaging and delivery - diet and nutrition (or lack thereof) - food-related environmental, economic, and societal sustainability, e.g., water, energy, climate, communications, and communities.

Yes No

## Budget Versions Tab:

When adding in the name of a budget in the top-left "Add" field, you must follow naming conventions.

### Naming convention:

- **PD number-Detailed budget** – If the budget is constructed within KC. This is required if MSU personnel are paid in the budget
- **PD number-Summary Budget** –If attaching an excel spreadsheet budget is being attached. This is if no MSU salaries are paid in the budget

Once you have added a budget, select the "open" button to get access to different additional tabs related to budget items across the top of the screen.

**You can have more than one budget saved in KC, but at the end must check final box on the one that will be used for review and submission.**

Proposal Development Document ?		Doc Nbr: 1514326/	Status: In Progress	Copied from Document Id: 150/
		Initiator: richar55	Created: 10:11 AM 11/07/2017	
		Sponsor/S2S: MSU-PROJECT GREEN/None	PI: Nikki Rothwell	

Proposal	S2S	Key Personnel	Special Review	Custom Data	Abstracts and Attachments	Questions	Budget Versions
Permissions	Proposal Summary	Proposal Actions	Medusa				

expand all collapse all  
\* required field

Budget Versions (07/01/2018 - 06/30/2019)

* Name	Version #	Direct Cost	F & A	Total	Budget Status	Final	Actions
Add: <input type="text"/>							<input type="button" value="add"/>
<input type="button" value="hide"/> 28772 Detailed Budget	1	40,196.09	0.00	40,196.09	Incomplete	<input type="checkbox"/>	<input type="button" value="open"/> <input type="button" value="copy"/> <input type="button" value="delete"/>
Residual Funds:		F&A Rate Type: NO INDIRECT COST					
Cost Sharing: 0.00		Last Updated: Nov 7, 2017 11:38:12 AM					
Unrecovered F&A: 2555.02		Last Updated By: richar55					
Comments: RFP limit indirect costs to zero							

## Parameters Tab:

**NOTE:** This tab is viewable after opening a budget in your "Budget Versions" tab.

## Budget Overview Panel:

- **Total Direct Cost Limit** --- The maximum direct costs (excluding F&A costs) to be covered by the sponsor. Exceeding will produce a warning message.
- **Budget Status** --- Reflects whether the budget is "Complete" or "Incomplete."
- **Final** – This gets checked once you are marking your final budget.
- **On/off Campus** – Extension usually selects off campus indirect rate, but will not be checked if on-campus proposal submission – then select "All on" *UNLESS located on East Lansing campus*
- **F&A Rate type** – Your grant may or may not allow indirect costs. If your RFP specifically does not allow indirect costs, be sure to change the F&A box to No Indirect Costs
- **Unrecovered F&A rate type still remains Modified Total Direct Cost**
  - If NO Indirects allowed, add in the comments box – RFP limits indirect costs to zero or whatever they might be limited to per the funding agency, but we will need documentation of that.
  - If your proposal is using the off-campus rate of 26%, then leave the F&A rate type as is as modified total direct cost.

## Submit Cost Sharing?

- The *Submit Cost Sharing?* box highlighted below on the Budget Version tab/Budget Overview panel, should only be checked when there is mandatory cost share, which then allows the cost share amount to be included on S2S submission and generates the appropriate follow up when the award is established and throughout post award management.
- The *Submit Cost Sharing?* box should not be checked for Voluntary Cost Share (committed or uncommitted), and the cost share details need to be noted in the Custom Data Tab with the following info:
  - 1) Amount: uncommitted can be listed as simply faculty effort, or if committed, list the amount of effort -X% ,
  - 2) Who will be responsible for paying: such as department funds, faculty start up, or another account, if known.)

Example for Voluntary Uncommitted: **Faculty effort to be covered by department funds.**

Example for Voluntary Committed: **Dr. Smith will commit 5% effort to be covered by RC2017 (or department funds)**

You are always welcome to include the numbers in the calculations on the budget document, we leave that up to the unit on how they wish to handle this. When the box is not checked, nothing is transmitted to the agency on S2S submissions and of course, those that are not S2S remain internal to MSU and are not submitted to any funding agency.

<b>Budget Overview</b>			
<b>Project Start Date:</b>	10/01/2017	<b>Modular Budget?</b>	<input type="checkbox"/>
<b>Project End Date:</b>	09/30/2018	<b>Residual Funds:</b>	<input type="checkbox"/>
<b>Total Direct Cost Limit:</b>		<b>Total Cost Limit:</b>	<input type="checkbox"/>
<b>Budget Status:</b>		<b>Unrecovered F &amp; A Rate Type:</b>	<input type="checkbox"/>
<b>Final?</b>		<b>F&amp;A Rate Type:</b>	<input type="checkbox"/>
<b>On/Off Campus:</b>		<b>Submit Cost Sharing?</b>	<input type="checkbox"/>

If you prefer not to have voluntary cost share documented in the final budget, create a second draft budget to calculate the cost share numbers and amounts for tracking purposes only. This budget will not be checked final and marked complete. Just name it cost share Estimates.

**Budget Periods & Totals Panel:**

- Correct project dates should be pulling from the proposal tab and the numbers are pulling from personnel selected from key personnel tab and non-personnel costs that have been entered. Be sure to enter your dates accurately if multiple years, because then you can use the “**generate all periods button**” and it will duplicate the costs (with salary inflation) into the next budget periods properly. Then you can edit effort changes or travel and other direct cost changes, but the heavy lifting will be done for you.

Document was successfully saved.

[< return to proposal](#)   [expand all](#)   [collapse all](#)  
\* required field

**Budget Overview** hide

<b>Project Start Date:</b>	07/01/2018	<b>Modular Budget?</b>	<input type="checkbox"/>
<b>Project End Date:</b>	06/30/2019	<b>Residual Funds:</b>	<input type="text"/>
<b>Total Direct Cost Limit:</b>	<input type="text" value="0.00"/>	<b>Total Cost Limit:</b>	<input type="text" value="0.00"/>
<b>Budget Status:</b>	Incomplete	<b>Unrecovered F &amp; A Rate Type:</b>	MODIFIED TOTAL DIRECT
<b>Final?</b>	<input type="checkbox"/>	<b>F&amp;A Rate Type:</b>	NO INDIRECT COST
<b>On/Off Campus:</b>	All Off	<b>Submit Cost Sharing?</b>	<input checked="" type="checkbox"/>
<b>Comments:</b>	RFP limit indirect costs to zero		

**Budget Periods & Totals** hide

Budget Periods	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
<b>Add:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="add"/>
<b>1</b>	07/01/2018	06/30/2019	12.0	40,196.09	40,196.09	0.00	2,555.02	0.00	0.00	0.00	<input type="button" value="delete"/>
<b>Totals</b>	<b>07/01/2018</b>	<b>06/30/2019</b>	<b>12.0</b>	<b>40,196.09</b>	<b>40,196.09</b>	<b>0.00</b>	<b>2,555.02</b>	<b>0.00</b>			<input type="button" value="recalculate"/>

[generate all periods](#)   [calculate all periods](#)   [default periods](#)   [save](#)   [reload](#)   [close](#)

### Rates Tab:

**NOTE:** This tab is viewable after opening a budget in your "Budget Versions" tab.

**If indirect costs are modified total Direct cost**

- Then you will have to change the rates here – may need additional assistance from Ann on this tab. Ann Smith will write something for this part

### Summary Tab:

**NOTE:** This tab is viewable after opening a budget in your "Budget Versions" tab. It shows a summary of your budget.



Document was successfully saved.

[< return to proposal](#)    [expand all](#)    [collapse all](#)  
 \* required field

Summary hide

		Period 1 07/01/2018 - 06/30/2019	Total
<b>Personnel</b> <span style="float: right;">EDIT</span>			
▶ show	Salary	23,304.85	23,304.85
▶ show	Fringe	7,064.24	7,064.24
▶ show	Calculated Direct Costs	0.00	0.00
	<b>Personnel Subtotal</b>	<b>30,369.09</b>	<b>30,369.09</b>
<b>Non-Personnel</b> <span style="float: right;">EDIT</span>			
▶ show	Travel	1,325.00	1,325.00
▶ show	Other Direct	8,502.00	8,502.00
▶ show	Calculated Direct Costs	0.00	0.00
	<b>Non-Personnel Subtotal</b>	<b>9,827.00</b>	<b>9,827.00</b>
<b>Totals</b>			
	<b>TOTAL DIRECT COSTS</b>	<b>40,196.09</b>	<b>40,196.09</b>
	<b>TOTAL F&amp;A COSTS</b>	<b>0.00</b>	<b>0.00</b>
	<b>TOTAL COSTS</b>	<b>40,196.09</b>	<b>40,196.09</b>

close

## Personnel Tab:

**NOTE: This tab is viewable after opening a budget in your "Budget Versions" tab.**

## Project Personnel Panel (All periods)

This panel shows all appointments, including appointment types, base salaries and salary effective dates. You should change the change effective date to current pending 10/1/ period to get the most current salary.

## Budget Overview (Period 1) panel

The Budget Overview section displays key dates and cost totals, limits and sharing figures, and provides a handy consolidated view of basic information about the budget period.

## Personnel Detail (Period 1) panel

- This is where additional faculty, technical and field staff efforts are added. Look them up using the magnifying glass option. If you don't know don't know how to spell last name you can use \*asterisks\* as wildcards.
- Once you've added all additional MSU personnel or "To be named" (TBN) by using the search feature and adding a role, you will need to select **SAVE**. This allows for their names to show up in the Personnel Detail panel at the bottom of this page.
  - **\*Person** – select person's name. If you don't see any names, select **SAVE** to pull in the people who are listed in the Key Personnel section of the system.
  - **\*Object Code Name** – select the **salary type** then the **add** button on the right.  
 The **start and end date** should accurately reflect the period 1 of your proposal (or period 2 or period 3, 4, 5)
    - To select period 2 (or desired period), go to the top of the page and select the different year, and then select update view and proceed with efforts for additional periods as in period 1 listed below
  - Then you would add the person's **% effort**, and if no cost share is required, **% charged** should be the same amount. If doing cost share, the % effort will be different or possibly 0% charged. Use this only if there is an agency required cost share.
  - Then review **Period Type** to reflect with calendar or summer
  - Then select **Calculate** and that should calculate your salary and fringe for that person for that period of time.

- **Adding Field Staff or hourly personnel** – under the **Person tab** – you would select Summary and then under the **\*Object Code Name field**, probably select summary hourly with FICA (which is calculated at 7.65); under the **Group tab** you would select **field staff temps** or you could type in a role using the **or cell** (new group) – you could put a person’s name there or a group such as Technician – etc. Then be sure to select the **Add button**. You can only use this option multiple times and list each temp or on-call individually, but you can calculate a group of people under this tab if they are all doing similar work – even if the rates might be different. Once that Summary group has been added:

**Budget Document** Doc Nbr: 1014320 / Status: SAVED  
Initiator: richar55 Created: 10:11 AM 11/07  
Budget Name: 28772 Detailed Budget Version #: 1

Budget Versions Parameters Rates Summary Personnel Non-Personnel Distribution & Income Modular Budget Budget Actions

Document was successfully reloaded.

[< return to proposal](#)   
 [expand all](#)   
 [collapse all](#)   
 \* required field

Select Budget Period:

Budget Period: 1: 07/01/2018 - 06/30/2019    View: Full Detail

[update view](#)

Project Personnel (All Periods) hide

Changes made in the Project Personnel panel must be saved before the corresponding results are reflected in the Personnel Details panel.

Project Personnel (All Periods)						
Person	Job Code:	Appointment Type:	* Base Salary:	* Salary Effective Date:	Actions	
Add: Employee Search Non-employee Search To be named						
1 Nikki Rothwell(Principal Investigator)	20001615 Extension Specialist-Continuing	12M DURATION	96,063.00	10/31/2017	<a href="#">delete</a>	
2 Larry Gut(Co-Investigator)	20001658 Professor-Tenure System	12M DURATION	146,351.04	10/31/2017	<a href="#">delete</a>	
3 Emily Pochubay(Co-Investigator)	20001614 Extension Educator-Fixed	12M DURATION	51,014.96	10/31/2017	<a href="#">delete</a>	
4 Karen Powers	20002532 Research Technologist II	12M DURATION	49,857.60	10/31/2017	<a href="#">delete</a>	

[sync personnel](#)

Budget Overview (Period 1) show

Personnel Detail (Period 1) show

[calculate current period](#)   
 [view personnel salaries](#)   
 [save](#)   
 [reload](#)   
 [close](#)

- **Select the Show button** and then you will see – **Budget Category** – select the drop down and there will be a wide range of options to choose from – often times with these types of staff it would be Other Professions.
- **# of Persons** - this can be 1 or several
- **Budget Justification notes** – this is where you will show a breakdown of hourly rate x number of hours per week x number of weeks and then calculate the total. Again, you can have different hourly rates for different people and break that out per person if different – however, you have a limited number of characters that you can use – so abbreviations are fine.
- **Up on summary line above this box you opened** – you will enter the total salary amount requested described in the budget justification notes, and then select the **Calculate** button and the system will calculate the FICA dollars.

Personnel Detail (Period 1) hide

---

**Add Details**

<b>* Person</b>	<b>* Object Code Name</b>	<b>Group</b>	<b>Act</b>
Select	select	select	ac

--or-- (new group)

---

**Staff (Salaries & Wages)** hide

Person	* Start Date	* End Date	% Effort	% Charged	Period Type	Requested Salary	Calculated Fringe	Action
1 4: Karen Powers - 20002532 - 12M DURATION	07/01/2018	06/30/2019	25.00	25.00	Calendar	12,744.85	6,256.40	calculate details delete
<b>totals:</b>						<b>12,744.85</b>	<b>6,256.40</b>	

show Staff (Salaries & Wages) Details

---

**Summary Hourly with FICA/Field Staff Temps** hide

Person	* Start Date	* End Date	% Effort	% Charged	Period Type	Requested Salary	Calculated Fringe	Action
Summary	07/01/2018	06/30/2019				10,560.00	807.84	calculate delete

---

**Summary Hourly with FICA/Field Staff Temps Details** hide

<b>Budget Category</b>	Other Professionals	<b># of Person(s)</b>	2
<b>Unrecovered F&amp;A</b>	0.00	<b>Cost Sharing</b>	0.00
<b>Apply Inflation?</b>	<input checked="" type="checkbox"/>	<b>On/Off Campus</b>	No
<b>Submit Cost Sharing?</b>	<input checked="" type="checkbox"/>	<b>Group Description</b>	
<b>Budget Justification Notes</b>	\$11/hr x 40 hours = \$440 x 16 weeks = \$7,040; \$11/hr x 20 = \$220 x 16 weeks =		

show Rate Classes

sync to cost limit

---

calculate current period view personnel salaries save reload close

- **ON CALLS /TEMPS** – may need to add ACA charges, but that is done under the non-personnel panel – described below

## Non-Personnel Tab

**NOTE:** This tab is viewable after opening a budget in your “Budget Versions” tab.

This is where you will add **Travel and Other Direct costs and Subcontract Costs**

**Equipment panel** – this is only used when you have an **INDIVIDUAL** piece of equipment that is \$5,000 or greater, everything else considered to be a supply item

## Travel panel

Select on this tab, and then you will see - **\*Object Code Name** – select the down arrow and you will have a choice of **Domestic** or **Foreign**. Then in the description box you will describe the travel. You can enter things like mileage or conference travel. Breakout the expenses for registration, lodging, per diem, etc. Keep like items together and breakout items that are not related to each other (local mileage versus conference expenses – PI travel versus field staff travel, etc.) Then in the **Quantity** column, you can enter 1 or multiple depending on the scenario. You then will need to enter the total cost for that line item in the **Total Base Cost** column and then select **ADD**. Be sure also that you save before you leave this panel.

## Participant Support

The Participant Support section is used to identify participant support-related costs for your proposal budget, specify details about them, and add them as numbered line items with expandable details that may be viewed.

**Other Direct panel** – under **\*Object Code Name** you will have a drop down list with many options – such as other, materials & supplies, postage and shipping, subcontracts <\$25,000 and >\$25,000 (this is important as indirect costs are

only charged on the first \$25,000, so need to break out the first \$25,000 and then use the > \$25,000 for costs over the first \$25,000) etc., . In the Description box, break down expenses showing how you arrive at total cost for that line item and then enter the **Quantity and Total Base COST** as you did in travel, selecting add after each item. **BE SURE TO BREAK OUT EXPENSES BY YEAR IF IT IS A MULTIPLE YEAR GRANT.**

*Affordable Care Act (ACA) Cost -*

Use the **Other** – object code name option for adding these expenses. If someone works for over 30 hours a week for more than 12 weeks, and their benefits are not included under fringe amounts, then you must add Affordable Care Act (ACA) costs. Currently, ACA costs are \$417/month for > 30 hours per week.

You can have more than 1 person with different calculations, so break those out in a brief, succinct note in the description box. Full ACA costs \$417/month x number of months they are working. You can also just add a person that you're splitting ACA costs with another project and pay the appropriate percentage. For example, if someone is 50% on the grant, then that would be \$208.5/month x number of months. Complete the **Quantity and Total Base Cost** the same as above and select **Add**. If you have a person with a full-time appointment, but split over several projects and their ACA is already covered on other projects, then you could add a note to that affect and not charge ACA to this particular project. If you need assistance with determining amounts, please contact Ann or Deb.

Select Budget Period: ?

Budget Period: 1: 07/01/2018 - 06/30/2019 View: Full Detail

[update view](#)

Budget Overview (Period 1) hide

Budget Overview (Period 1)					
Period 1 Start Date	07/01/2018	Cost Limit	0.00		
Period 1 End Date	06/30/2019	Total Cost Limit	0.00		
Direct Cost	40,196.09	Direct Cost Limit	0.00		
F&A Cost	0.00	Total Direct Cost Limit	0.00		
Unrecovered F&A	2,555.02	Cost Sharing	0.00		
Total Sponsor Cost	40,196.09	Total Sponsor Cost (Entire Project)	40,196.09		

Equipment show

Travel (1 line item) hide

Travel					
	* Object Code Name	Description	Quantity	Total Base Cost	Action
Add:	<input type="text" value="select"/>		<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="button" value="add"/>
1	Travel - Domestic 7620	Local mileage to travel to grower sites @ \$.53/mile x 2500	<input type="text" value="1"/>	<input type="text" value="1,325.00"/>	<input type="button" value="delete"/>

[show](#) [Line Item Details](#)

Participant Support show

Other Direct (2 line items) hide

Other Direct					
	* Object Code Name	Description	Quantity	Total Base Cost	Action
Add:	<input type="text" value="select"/>		<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="button" value="add"/>
1	Other 7690	(1) ACA cost \$417/mt x 4 mts = \$1668; (.5) ACA cost \$208.50/mt x 4 mts = \$834	<input type="text" value="2"/>	<input type="text" value="2,502.00"/>	<input type="button" value="delete"/>
2	Materials & Supplies 7650	SWD lures = \$6/each x 1000 = \$6,000	<input type="text" value="1000"/>	<input type="text" value="6,000.00"/>	<input type="button" value="delete"/>

[show](#) [Line Item Details](#)

## Distribution and Income

What do we want to put here?

## Modular Budget---why?

This tab is only used when required by Federal grants specifically asking for a modular budget. Work with Ann Smith and the Office of Sponsored Programs (OSP) for support if your project requires this.

## More on "BUDGET VERSIONS" Tab -

**Note you can create multiple budgets** in here to explore different budget scenarios. Once you are done you will need to check the **FINAL BOX** back on the Budget Versions panel. However, DO NOT change the BUDGET STATUS field to complete; only OSP can do that once they have reviewed the budget. When you get to this point, let Ann or Deb know that your budget is ready for review. Once we review it, we will add a note in the notes panel and let OSP know that it's ready for their review. Once we have OSP approval, and if everything else is set with your proposal, one of us will route it for full institutional approval.

Proposal Development Document <span>?</span>		Doc Nbr: 15143267	Status: In Progress	Copied from Document Id: 150/
		Initiator: richar55	Created: 10:11 AM 11/07/2017	
		Sponsor/S2S: MSU-PROJECT GREENEEN/None	PI: Nikki Rothwell	

Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions Budget Versions  
Permissions Proposal Summary Proposal Actions Medusa

expand all collapse all  
\* required field

Budget Versions (07/01/2018 - 06/30/2019) hide

* Name	Version #	Direct Cost	F & A	Total	Budget Status	Final	Actions
Add: <input type="text"/>						<input type="checkbox"/>	<input type="button" value="add"/>
<span>hide</span> 28772 Detailed Budget	1	40,196.09	0.00	40,196.09	Incomplete	<input type="checkbox"/>	<input type="button" value="open"/> <input type="button" value="copy"/> <input type="button" value="delete"/>
Residual Funds:			F&A Rate Type:	NO INDIRECT COST			
Cost Sharing:	0.00		Last Updated:	Nov 7, 2017 11:38:12 AM			
Unrecovered F&A:	2555.02		Last Updated By:	richar55			
Comments:	RFP limit indirect costs to zero						

save reload close

## Budget Actions Tab

**NOTE: This tab is viewable after opening a budget in your "Budget Versions" tab.**

You can print a PDF of your budget from this page. Go the **Print Forms tab** and select the Show button. On the first line, check the "**Print Budget Comments**" box. Select on the PDF symbol right below the action column on that line and it will open up a PDF summary of your budget that can be saved to your computer.

Document was successfully saved.

[< return to proposal](#)   [expand all](#)   [collapse all](#)

\* required field

Print Forms [hide](#)

	Print Forms	Print Budget Comments	Actions
1	Budget Costshare Summary Report	<input type="checkbox"/>	
2	Budget Cumulative Report	<input type="checkbox"/>	
3	Budget Salary Report	<input type="checkbox"/>	
4	Budget Summary Report	<input type="checkbox"/>	
5	Budget Summary Total Report	<input type="checkbox"/>	
6	Budget Total Report	<input type="checkbox"/>	
7	Industrial Budget Report	<input type="checkbox"/>	
8	Industrial Cumulative Budget Report	<input type="checkbox"/>	

Budget Justification [show](#)

Proposal Hierarchy [show](#)

Subaward Budget [show](#)

Data Validation [show](#)

[save](#)
[reload](#)
[close](#)

## RETURN TO BUDGET VERSIONS TAB

**Before returning to the proposal**, go back to the budget versions tab and mark the budget that you want to be used and reviewed at final. **DO NOT CHANGE THE STATUS** to approved – only OSP can make that change once Ann and Deb have reviewed and OSP has also reviewed. Then they will mark it approved.

## RETURN TO PROPOSAL

**BLUE BOX AT TOP OF PAGE (it's on each page in this budget document)**



**When you are done in the Budget tabs, be sure to Save.** Then, if you select the blue “return to proposal” button, you can go to the Proposal Actions tab.

## Proposal Actions

### Data Validation Panel –

Select the “**show**” button and then in the middle of that first panel you will see a **turn on validation** button. Select this, and it will show you any errors or warning notifications. You should receive the error of “budget is incomplete, please update the status”. **DO NOT SELECT THE FIX BUTTON.** This is an error that can only be remedied after OSP has reviewed, approved, and changed your budget to the complete status.

<b>Proposal Development Document</b> <span>?</span>		<b>DOC Nbr:</b> 15143207	<b>Status:</b> In Progress	<b>Copied from Document ID:</b> 120742
		<b>Initiator:</b> richar55	<b>Created:</b> 10:11 AM 11/07/2017	
		<b>Sponsor/S2S:</b> MSU-PROJECT GREENE/None	<b>PI:</b> Nikki Rothwell	

Proposal	S2S	Key Personnel	Special Review	Custom Data	Abstracts and Attachments	Questions	Budget Versions
Permissions	Proposal Summary	Proposal Actions	Medusa				

expand all collapse all  
\* required field ?

Data Validation	<a href="#">▶ show</a>
Proposal Hierarchy	<a href="#">▶ show</a>
Print	<a href="#">▶ show</a>
Copy to New Document	<a href="#">▶ show</a>
Route Log	<a href="#">▶ show</a>
Ad Hoc Recipients	<a href="#">▶ show</a>

[delete proposal](#) [send notification](#) [submit](#) [save](#) [reload](#) [close](#) [cancel](#)

**Data Validation** ▼ hide ?

**Data Validation** ?

You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov

[turn on validation](#)

Proposal Hierarchy	<a href="#">▶ show</a>
Print	<a href="#">▶ show</a>
Copy to New Document	<a href="#">▶ show</a>
Route Log	<a href="#">▶ show</a>
Ad Hoc Recipients	<a href="#">▶ show</a>

**Data Validation** ▼ hide ?

**Data Validation** ?

You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov

[turn off validation](#)

<b>Validation Errors</b>	
<span>▼ hide</span>	<b>Budget Versions (1)</b>
The budget is incomplete. Please update the status. <a href="#">fix</a>	
<b>Warnings</b>	
No Warnings present.	
<b>Grants.Gov Errors</b>	
No Grants.Gov Errors present.	

**Route Log Panel** – if you’d like to follow the status of your proposal you can use this panel and select **show future actions** to see who still needs to approve your proposal.

Route Log ▼ hide

---

**Route Log** refresh

expand all collapse all

---

ID: 15143267 ▼ hide

<b>Title</b>	Proposal Development Document - Proposal Number: 28924; PI: Nikki Rothwell; Sponsor: MSU-PROJECT GREENEEN		
<b>Type</b>	<a href="#">Proposal Development Document</a>	<b>Created</b>	10:11 AM 11/07/2017
<b>Initiator</b>	<a href="#">Richardson, Debra</a>	<b>Last Modified</b>	02:11 PM 11/21/2017
<b>Route Status</b>	SAVED	<b>Last Approved</b>	
<b>Document Status</b>		<b>Document Status Modified</b>	
<b>Node(s)</b>	Initiated	<b>Finalized</b>	

---

**Actions Taken** ▼ hide

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	<a href="#">Richardson, Debra</a>		10:11 AM 11/07/2017	

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**Pending Action Requests** ▼ hide

Action	Requested Of	Time/Date	Annotation
<a href="#">▶ show</a> IN ACTION LIST COMPLETE	<a href="#">Richardson, Debra</a>	10:11 AM 11/07/2017	

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**Future Action Requests** ▼ hide

Action	Requested Of	Time/Date	Annotation
<a href="#">▶ show</a> PENDING APPROVE	<a href="#">Rothwell, Nikki</a>	01:21 PM 11/22/2017	KC-WKFLW PI
<a href="#">▶ show</a> PENDING APPROVE	<a href="#">Gut, Larry</a>	01:21 PM 11/22/2017	KC-WKFLW COI
<a href="#">▶ show</a> PENDING APPROVE	<a href="#">Pochubay, Emily</a>	01:21 PM 11/22/2017	KC-WKFLW COI
<a href="#">▶ show</a> PENDING APPROVE	<a href="#">Schueller, Jean</a> (DEPT_CHAIR) <a href="#">Bates, Ronald</a> (DEPT_CHAIR) <a href="#">Koivisto, Adam</a> (DEPT_CHAIR) <a href="#">Morris, Keri</a> (DEPT_CHAIR)	01:21 PM 11/22/2017	
<a href="#">▶ show</a> PENDING APPROVE	<a href="#">Schueller, Jean</a> (DEPT_CHAIR) <a href="#">Bates, Ronald</a> (DEPT_CHAIR) <a href="#">Koivisto, Adam</a> (DEPT_CHAIR) <a href="#">Morris, Keri</a> (DEPT_CHAIR)	01:21 PM 11/22/2017	
<a href="#">▶ show</a> PENDING APPROVE	<a href="#">Gallagher, Linda</a> (DEPT_CHAIR) <a href="#">Ravlin, Forrest</a> (DEPT_CHAIR)	01:21 PM 11/22/2017	
<a href="#">▶ show</a> PENDING APPROVE	<a href="#">Gallagher, Linda</a> (DEPT_CHAIR) <a href="#">Ravlin, Forrest</a> (DEPT_CHAIR)	01:21 PM 11/22/2017	
<a href="#">▶ show</a> PENDING APPROVE	<a href="#">Gallagher, Linda</a> (DEPT_CHAIR) <a href="#">Ravlin, Forrest</a> (DEPT_CHAIR)	01:21 PM 11/22/2017	
<a href="#">▶ show</a> PENDING APPROVE	(Multiple - expand to see details)	01:21 PM 11/22/2017	
<a href="#">▶ show</a> PENDING			

At this point, you have completed entering your proposal in the KC system – remember the only way to **EXIT** the proposal properly is to use the **CLOSE** button at the bottom of the screen. If you use the X at the top of the screen, you will lock the proposal for editing and no one else will be able to get into the proposal to approve or make any changes to it.

**NEXT STEPS: After completing the tabs –**

Email Deb and Ann to let them know that your budget has been marked final and is ready for MSUE review and approval. Once we have reviewed and approved your budget, we will enter a note into the proposal and email OSP that it is ready for review. Once OSP approves it and marks the budget complete, they email Ann and Deb that the proposal is ready for institutional approval. Ann and/or Deb will route the proposal and you should receive electronic notice that it is ready for your approval. Be sure to complete your conflict of interest questions or it will hold up the approval process. Once the proposal is marked Approved and Submitted by OSP, then your proposal can be submitted to the funding agency.

**Submitting to the Funder**

**Who submits to the funding agency?**



In most cases the PI submits their proposal to the funding agency. For commodity proposals, Jackie Lindsey ([jlindsey@msu.edu](mailto:jlindsey@msu.edu)) submits proposals directly from the KC system, so we have to be sure that the final proposal is attached. Only Federal proposals, which are S2S submissions, are handled by OSP directly.

## Making Future Submissions

### After my first proposal, how do I make future submissions?

They can be copied from the first submission that you have created.

Through EBS, enter the Research Administration Tab. Once you are in KC, use the Search Proposal button to find your proposal. When you find it, it will give you the option to edit, view, copy. So you will select the **copy** button.

Proposal Number:	28924
Proposal Type:	select
Proposal State:	select
Investigator:	
Project Title:	
Sponsor Deadline Date From:	
Sponsor Deadline Date To:	
Target Date From:	
Target Date To:	
Sponsor Code:	
Sponsor Name:	
Prime Sponsor:	
Parent Unit ID:	
Unit ID:	
Unit Name:	
Award ID:	
Grants.gov Opportunity:	
CFDA Number:	
Hierarchy Status:	
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

You have entered the primary key for this table (Proposal Number) in the search criteria. Since these fields can be used to uniquely identify a row in this table, the other search criteria entered will be ignored.

One item retrieved.

Actions	Proposal Number	Proposal Type	Proposal State	Project Title	Total Requested Amount	Final Approval Date	Sponsor Code	Sponsor Name	Prime Sponsor	Principal Investigator	Co-I	Key Person	Lead Unit	Lead Unit Name	Sponsor Deadline Date	Target Date	Proj Start
<a href="#">edit</a> <a href="#">view</a> <a href="#">copy</a> <a href="#">medusa</a>	28924	New	In Progress	Modifying the Landscape to Reduce Spotted Wing Drosophila (SWD) Populations in Michigan Orchards.			018650	MSU-PROJECT GREEN		Nikki Rothwell	Larry Gut; Emily Pochubay		10058940	EXT AG AGRIBUSINES	01/08/2018	01/08/2018	07/01/

Proposal Development Document ?

Initiator:	richar55	Created:	10:11 AM 11/07/2017
Sponsor/S2S:	MSU-PROJECT GREEN/None		

[Proposals](#) [S2S](#) [Key Personnel](#) [Special Review](#) [Custom Data](#) [Abstracts and Attachments](#) [Questions](#) [Budget Versions](#)  
[Permissions](#) [Proposal Summary](#) [Proposal Actions](#) [Medusa](#)

[expand all](#) [collapse all](#)  
 \* required field ?

Data Validation [▶ show](#)

Proposal Hierarchy [▶ show](#)

Print [▶ show](#)

Copy to New Document [▼ hide](#)

**Copy to New Document** ?

Proposal:	yes
Lead Unit:	10058940
* Sponsor Deadline Type:	select ▼
Sponsor Deadline Date:	<input type="text"/>
Budget?:	<input type="checkbox"/> all versions ▼
Attachments?:	<input type="checkbox"/>
* Lead Unit:	select ▼
Questionnaires?:	<input checked="" type="checkbox"/>

[copy proposal](#)

Route Log [▶ show](#)

Ad Hoc Recipients [▶ show](#)

[delete proposal](#) [send notification](#) [submit](#) [save](#) [reload](#) [close](#) [cancel](#)

Once you are in the “Copy” screen, complete the following:

- Sponsor Deadline Type**                      You will need to fill in the type – probably with **Deadline**
- Sponsor Deadline Date**                      Enter the deadline of your new proposal
- Budget Proposal:**                              Check this box to bring your budget (s) forward into the copy of your new
- Attachments?**                                      You can also include the attachments, and then select the **replace** button to replace them with the new documents.
- Lead Unit**    Select the correct lead unit.
- Questionnaires?**                                      It will bring into your new proposal the completed questionnaires page  
You will need to review your previous answers to make sure that are still correct

Next, select the **copy proposal** button. You should have a new PD # and then be able to do the edits to create your next proposal. Be sure to save it.

Then be sure to go to the permissions tab and add Ann and Deb back in as those do not carry forward with copy. Go to the budget versions tab and you should be able to create a copy of the budget, and then rename it with the naming convention with the current PD number – otherwise it will retain an old PD # that will not make sense. Then you will be able to delete the old budget once you have a copy, rename, open, and then go back to the budget versions tab and select **Save**.