KC - Kuali 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 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 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.

Contents

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

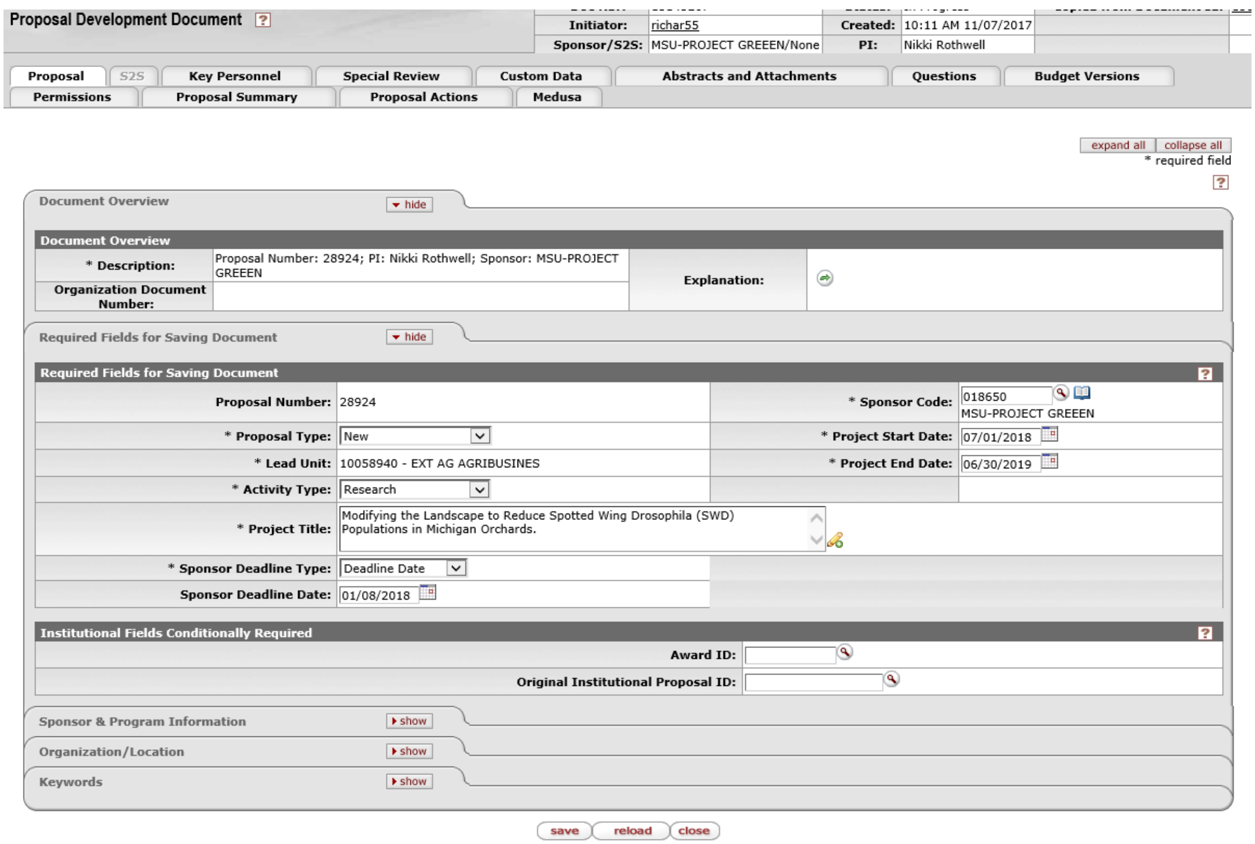
Sponsor Deadline Date: Unique to RFP

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.*



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.

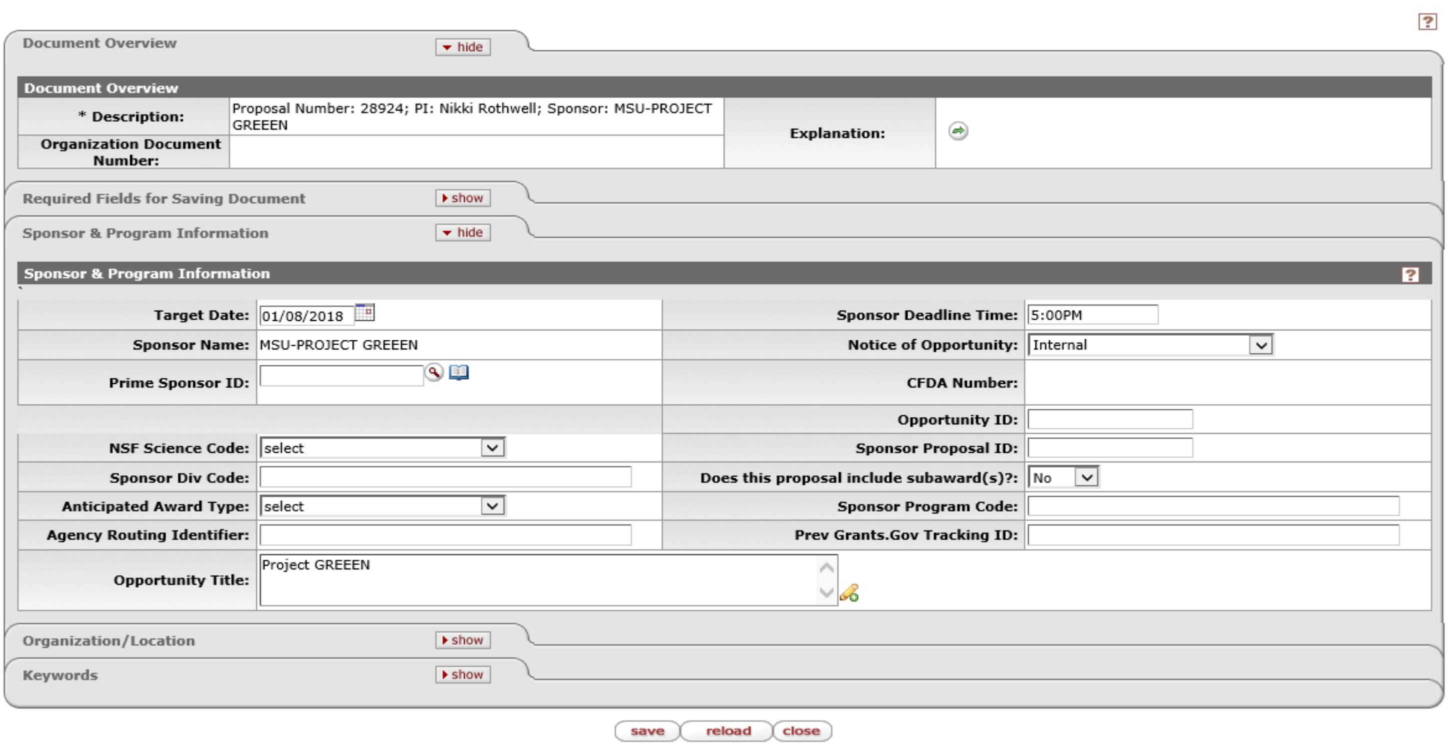
Prime Sponsor ID: Use this field only if we are not the ones directly submitting the proposal to the agency. For example, if we are a sub to Purdue, we would put Purdue as the Sponsor Code above and USDA as the Sponsor Name here. Use the same search function as above.

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

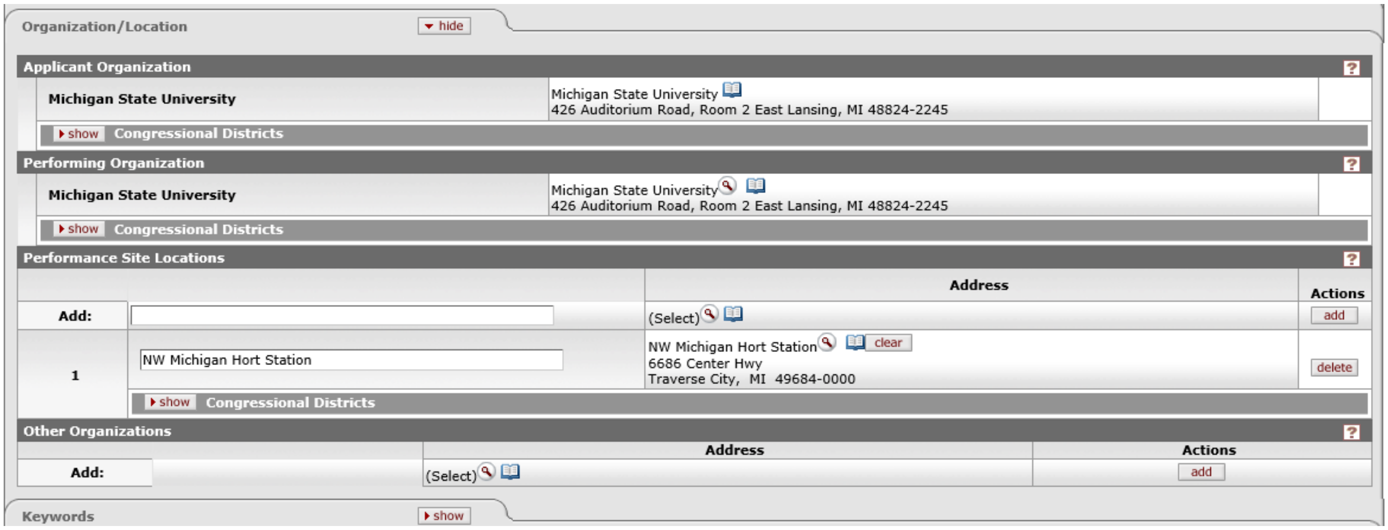
Notice of Opportunity: Usually select **non-federal solicitation** – Some grants are Internal, etc.

Does proposal have Subawards: Must answer Y or N or you will get a validation 'error'



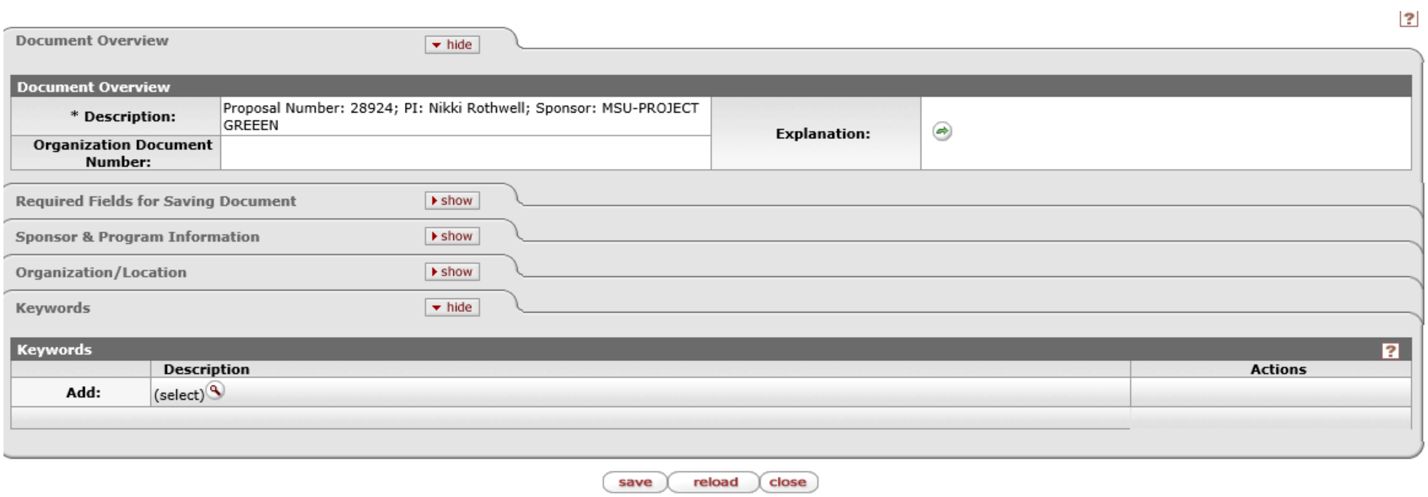
Organization/Location Panel:

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.



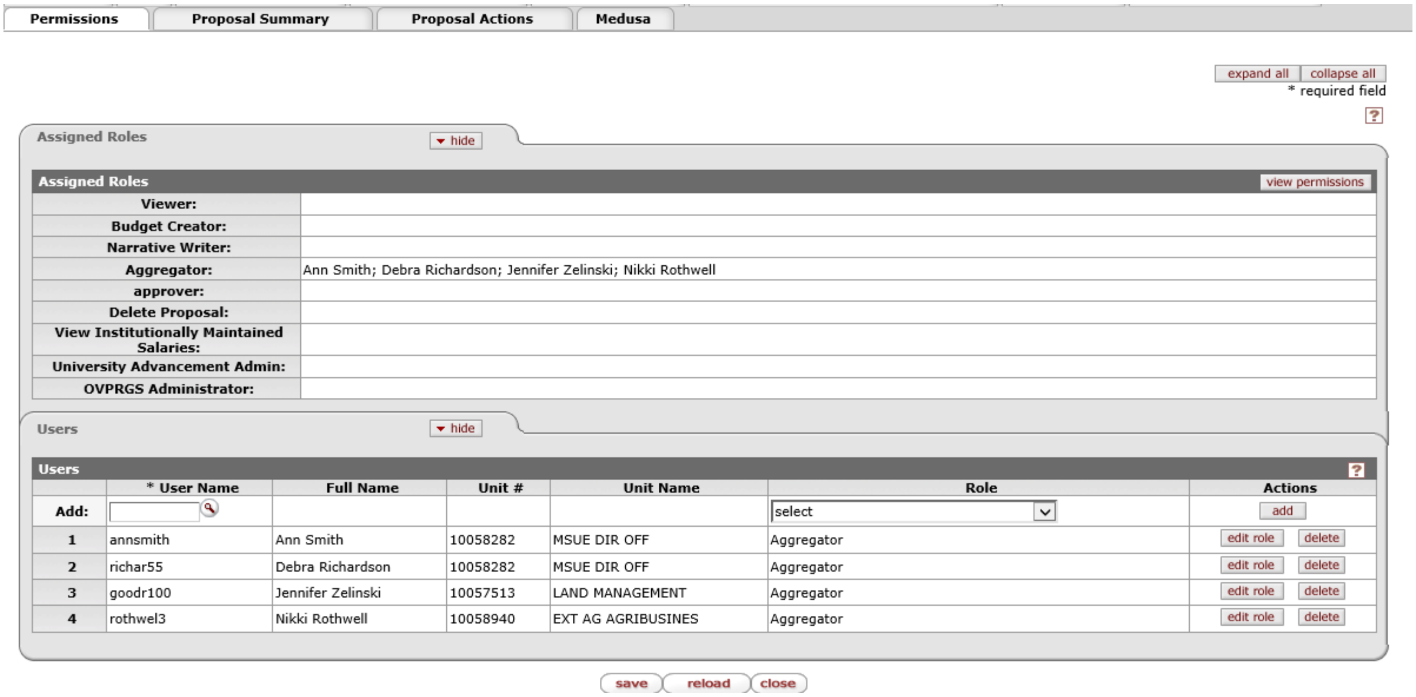
Keywords Panel:

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



Permissions Tab:

Whomever 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:	
OVPRGS Administrator:	

Users hide

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

save | reload | close

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.

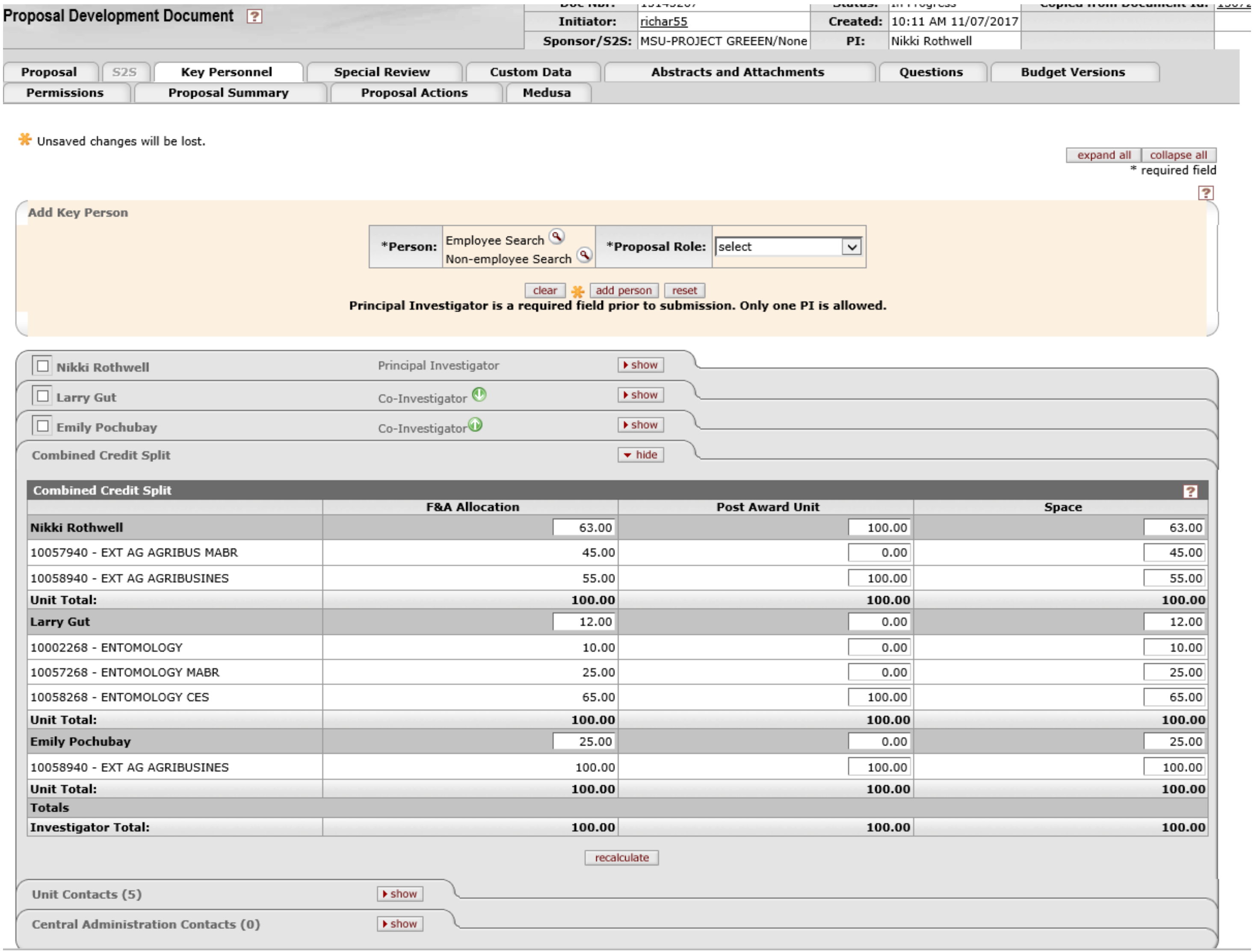
After the second person is added after the PI, you will see green arrows next to their roles. You can use these arrows to change how the people show up on the Grants.gov package, if applicable.

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.



	F&A Allocation	Post Award Unit	Space
Nikki Rothwell	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
Unit Total:	**100.00**	**100.00**	**100.00**
Larry Gut	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
Unit Total:	**100.00**	**100.00**	**100.00**
Emily Pochubay	25.00	0.00	25.00
10058940 - EXT AG AGRIBUSINES	100.00	100.00	100.00
Unit Total:	**100.00**	**100.00**	**100.00**
Totals			
Investigator Total:	**100.00**	**100.00**	**100.00**

F&A Allocation Column (1st 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	2% effort	take 2/8 = 25%	Top gray box = 25
	8 TOTAL		

Combined Credit Split

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

Post Award Unit column (2nd 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
Nikki Rothwell	**100.00**
10057940 - EXT AG AGRIBUS MABR	0.00
10058940 - EXT AG AGRIBUSINES	100.00
Unit Total:	**100.00**
Larry Gut	**0.00**
10002268 - ENTOMOLOGY	0.00
10057268 - ENTOMOLOGY MABR	0.00
10058268 - ENTOMOLOGY CES	100.00
Unit Total:	**100.00**
Emily Pochubay	**0.00**
10058940 - EXT AG AGRIBUSINES	100.00
Unit Total:	**100.00**
Totals	
Investigator Total:	**100.00**

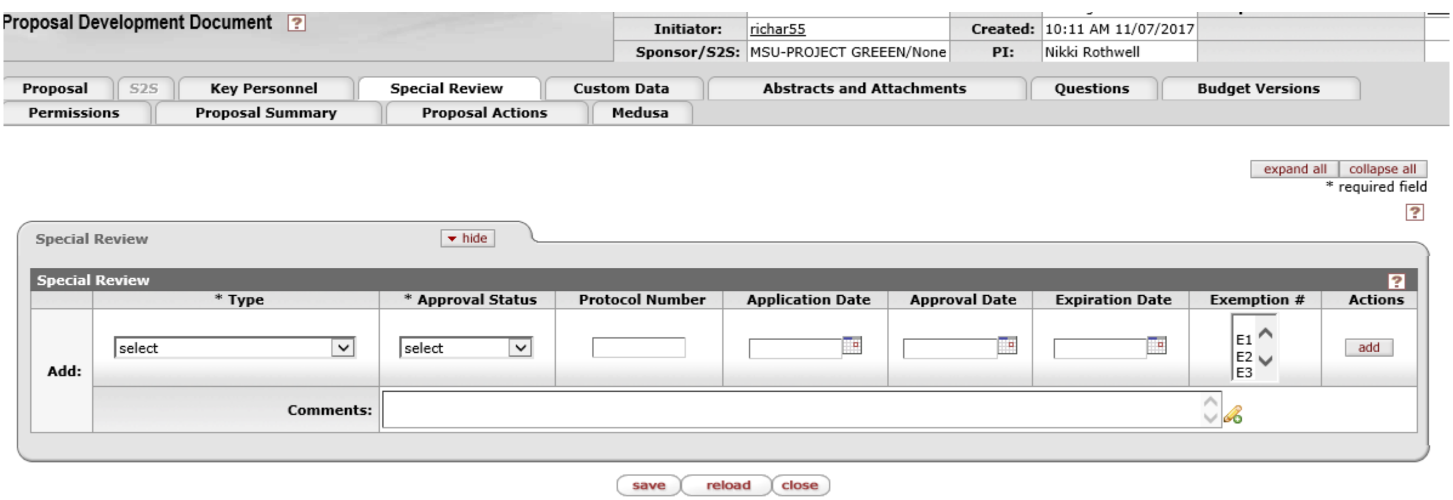
Space column (Column 3): This column mirrors the F&A allocation column even if a faculty member has a split appointment. Splits remain broken out in the same way.

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

Special Review Tab:

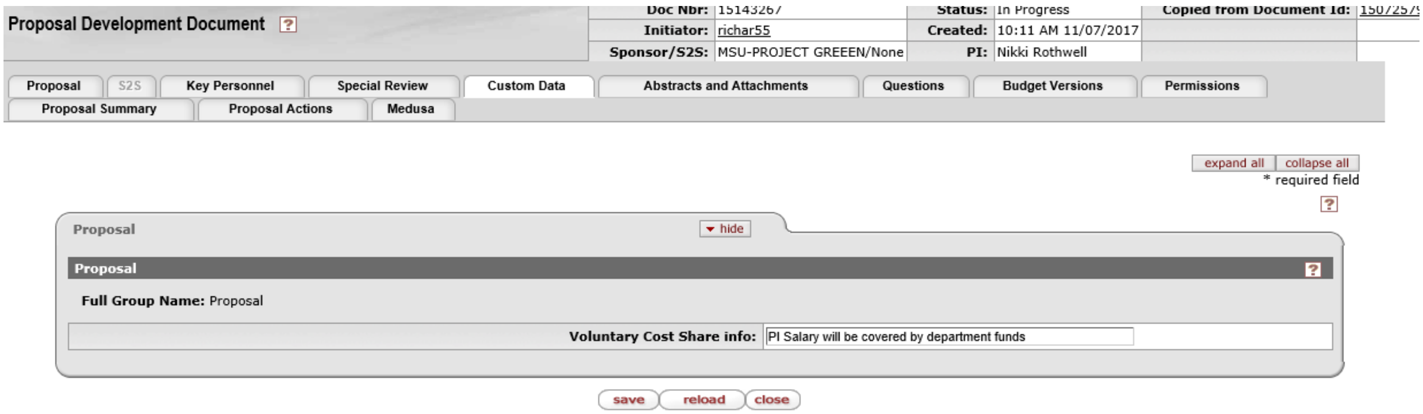
This tab is only for if you have one of the following items. If you do not, you may skip it.

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



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.



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:

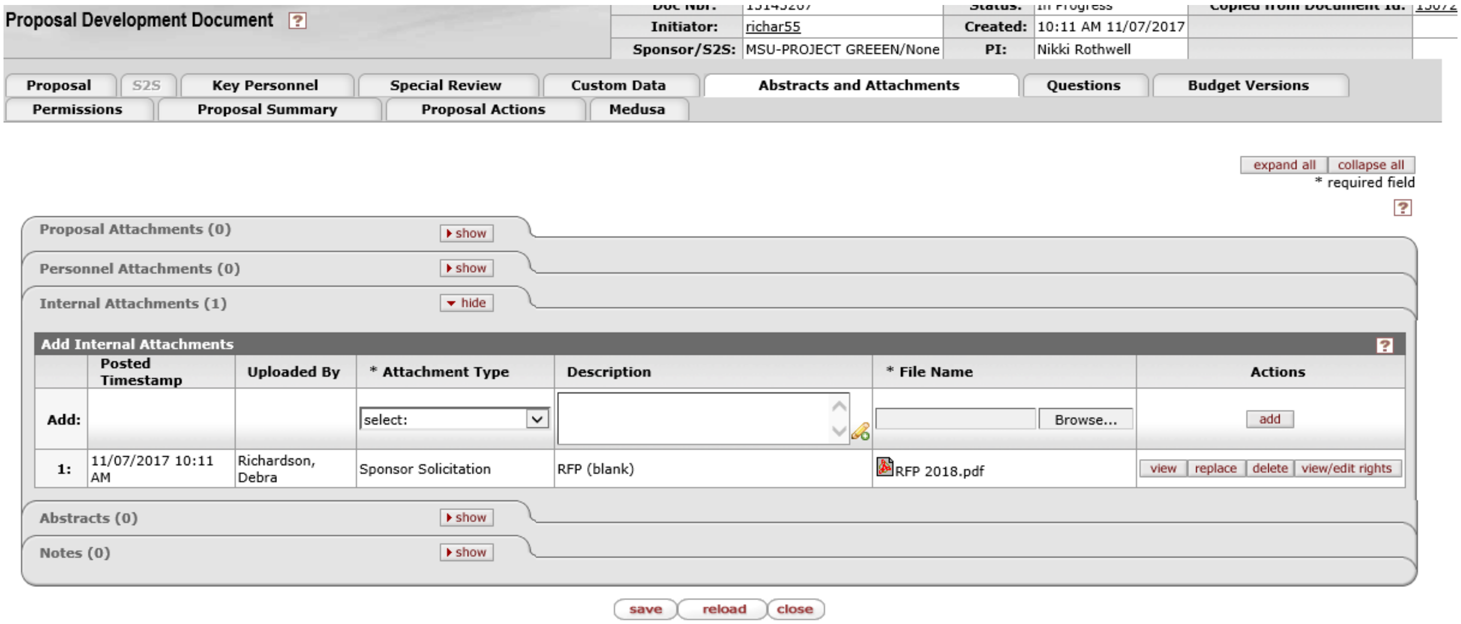
If you are required to add a CV, bio, or other document related to the personnel of your grant, you would add it here.

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.

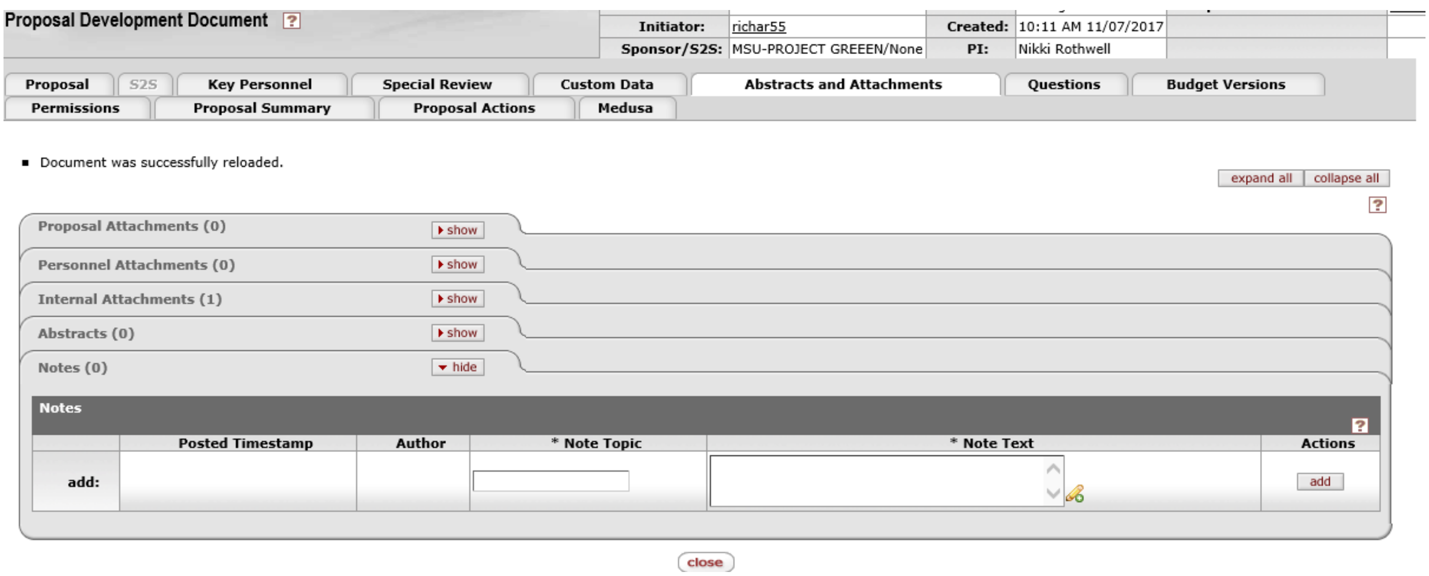


Abstracts Panel

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.



Questions Tab:

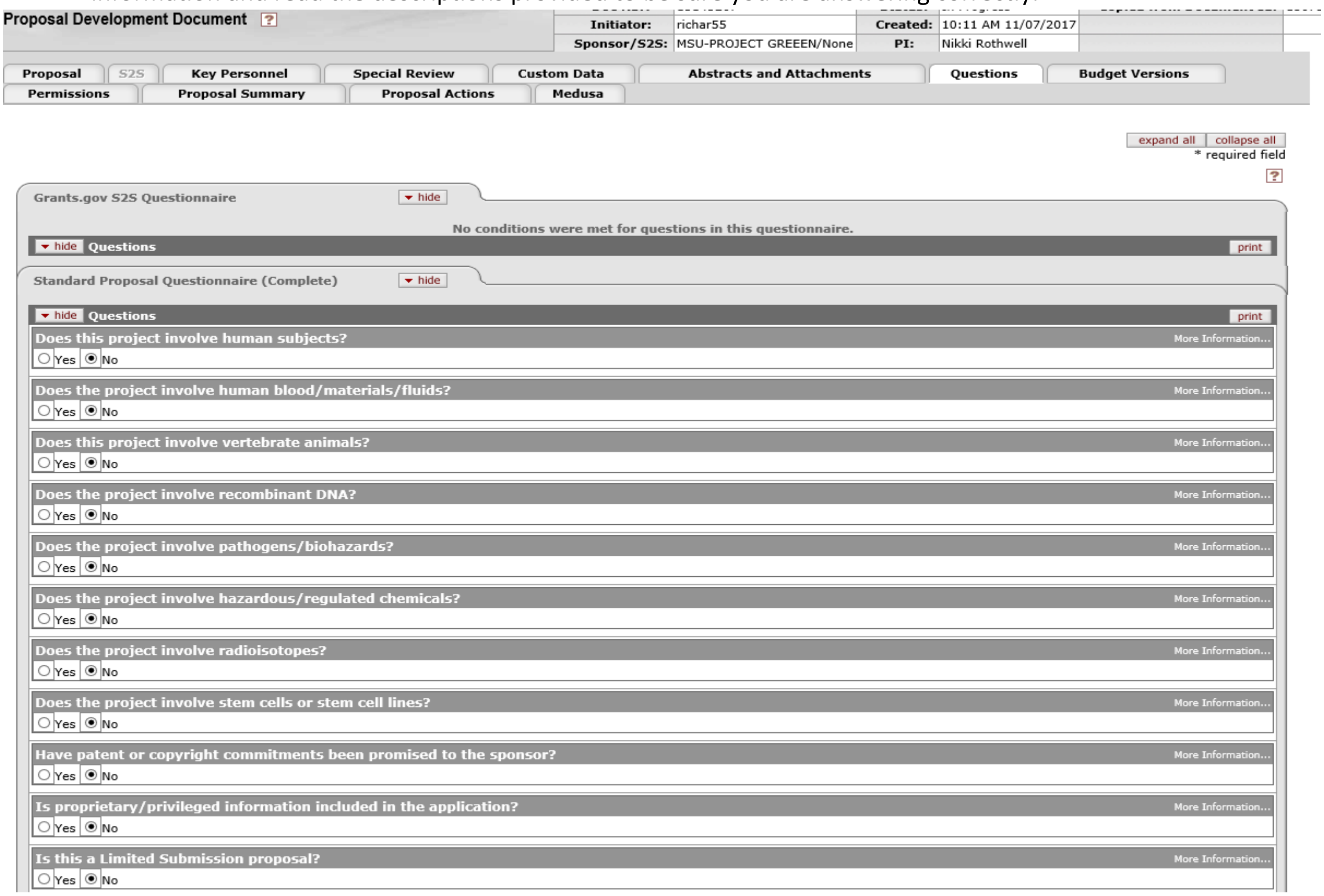
Grants.gov S25 Questionnaire Panel

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.



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

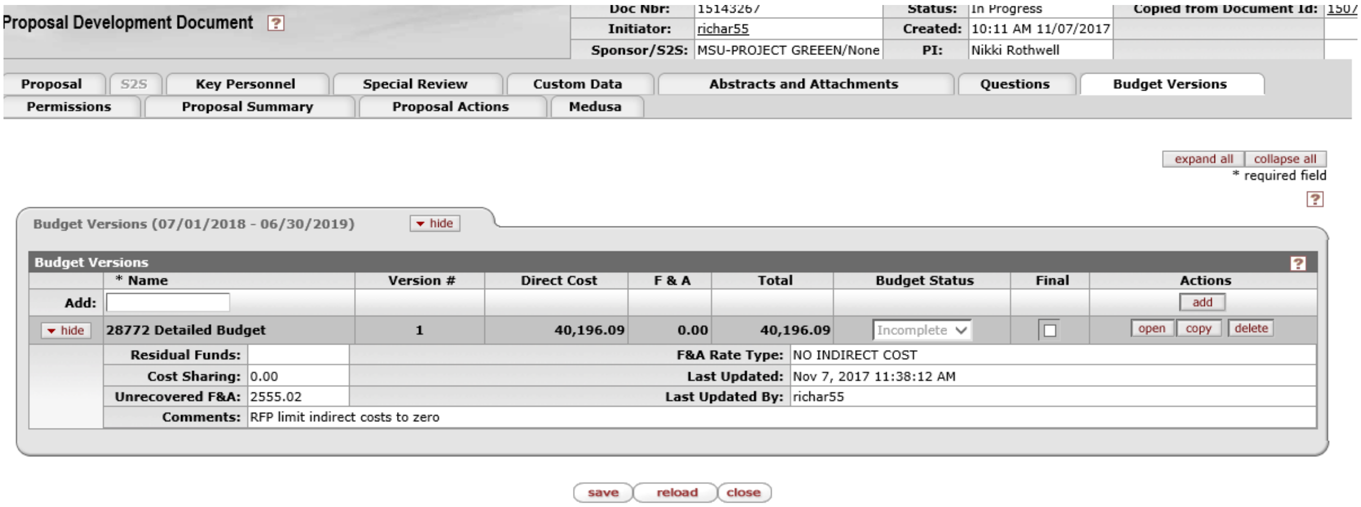
Budget Versions Tab:

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.



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 check 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 you 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*
  - o *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.*
  - o *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 <u>checked</u> when there is <u>mandatory</u> 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 <u>not</u> 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 <u>Uncommitted:</u> ***Faculty effort to be covered by department funds***.

Example for Voluntary <u>Committed:</u> ***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.

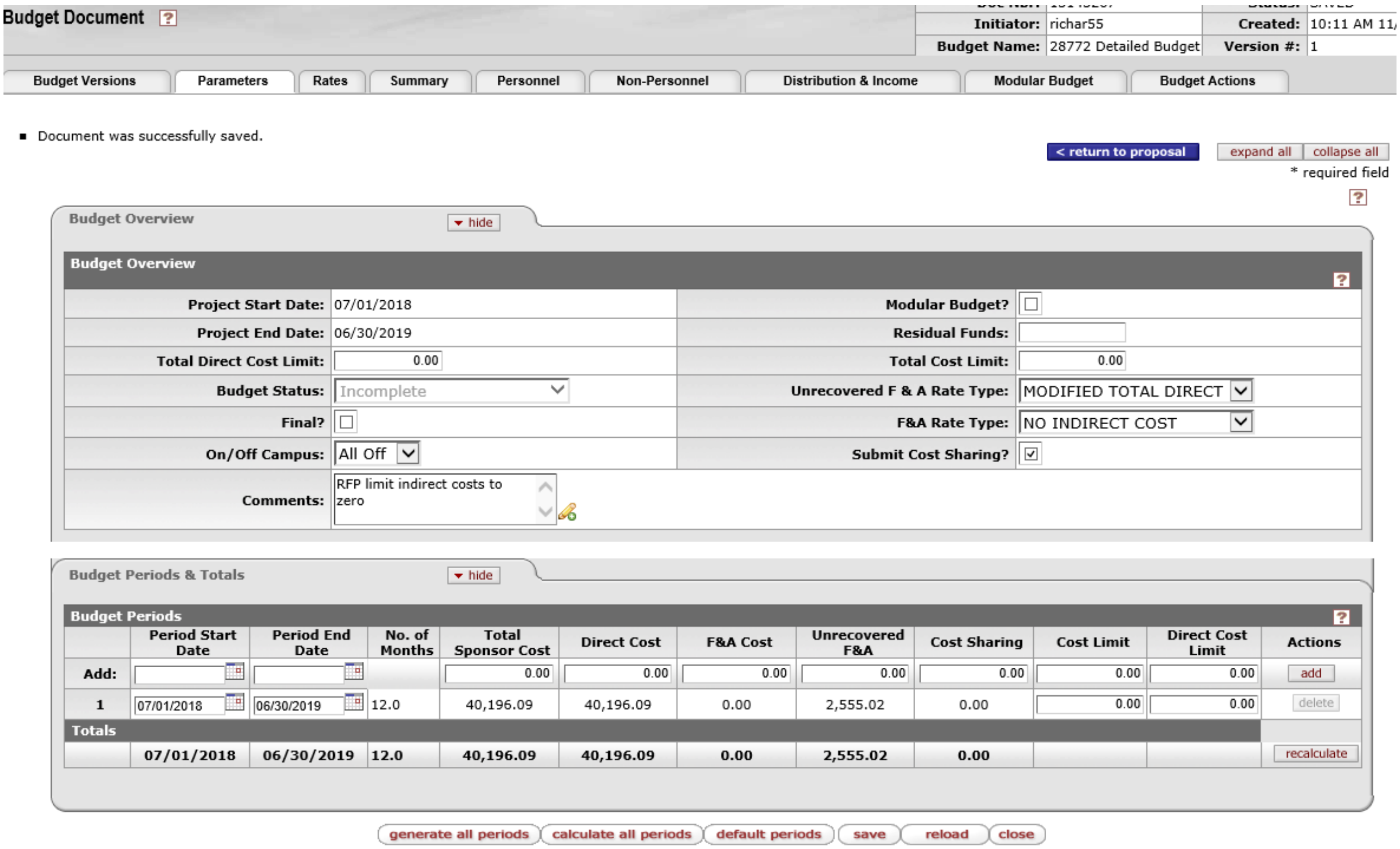
Budget Overview

Project Start Date:	10/01/2017	**Modular Budget?**	
Project End Date:	09/30/2018	**Residual Funds:**	
Total Direct Cost Limit:		**Total Cost Limit:**	
Budget Status:		**Unrecovered F & A Rate Type:**	
Final?		**F&A Rate Type:**	
On/Off Campus:		**Submit Cost Sharing?**	

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 <u>will not</u> 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.



Budget Document

Initiator:	richar55	Created:	10:11 AM 11/
Budget Name:	28772 Detailed Budget	Version #:	1

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

- Document was successfully saved.

< return to proposal | expand all | collapse all

* required field

Budget Overview

Project Start Date:	07/01/2018	Modular Budget?	☐
Project End Date:	06/30/2019	Residual Funds:	
Total Direct Cost Limit:	0.00	Total Cost Limit:	0.00
Budget Status:	Incomplete	Unrecovered F & A Rate Type:	MODIFIED TOTAL DIRECT
Final?	☐	F&A Rate Type:	NO INDIRECT COST
On/Off Campus:	All Off	Submit Cost Sharing?	☑
Comments:	RFP limit indirect costs to zero		

Budget Periods & Totals

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
Add:				0.00	0.00	0.00	0.00	0.00	0.00	0.00	add
1	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	delete
Totals											
	07/01/2018	06/30/2019	12.0	40,196.09	40,196.09	0.00	2,555.02	0.00			recalculate

generate all periods | calculate all periods | default periods | save | reload | close

Rates Tab:

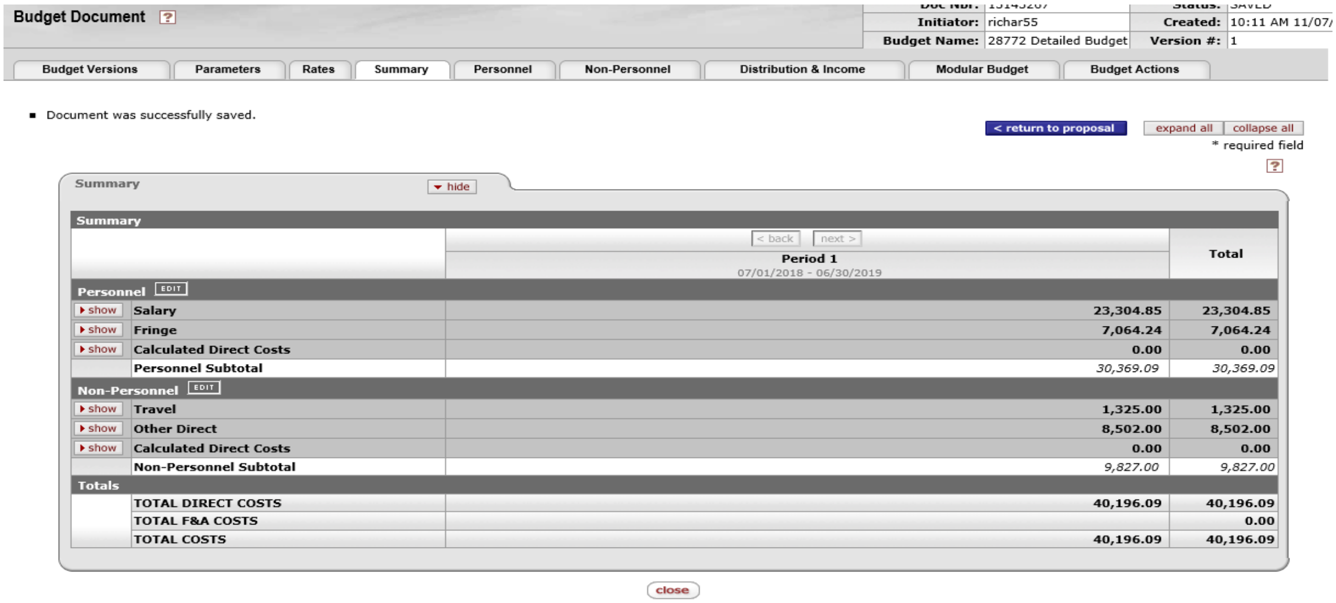
NOTE: This tab is viewable after opening a budget in your "Budget Versions" tab.

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.



Budget Document

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 saved.

< return to proposal   expand all   collapse all
* required field

Summary

Summary	Period 1 07/01/2018 - 06/30/2019	Total
Personnel		
Salary	23,304.85	23,304.85
Fringe	7,064.24	7,064.24
Calculated Direct Costs	0.00	0.00
Personnel Subtotal	30,369.09	30,369.09
Non-Personnel		
Travel	1,325.00	1,325.00
Other Direct	8,502.00	8,502.00
Calculated Direct Costs	0.00	0.00
Non-Personnel Subtotal	9,827.00	9,827.00
Totals		
TOTAL DIRECT COSTS	40,196.09	40,196.09
TOTAL F&A COSTS		0.00
TOTAL COSTS	40,196.09	40,196.09

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.

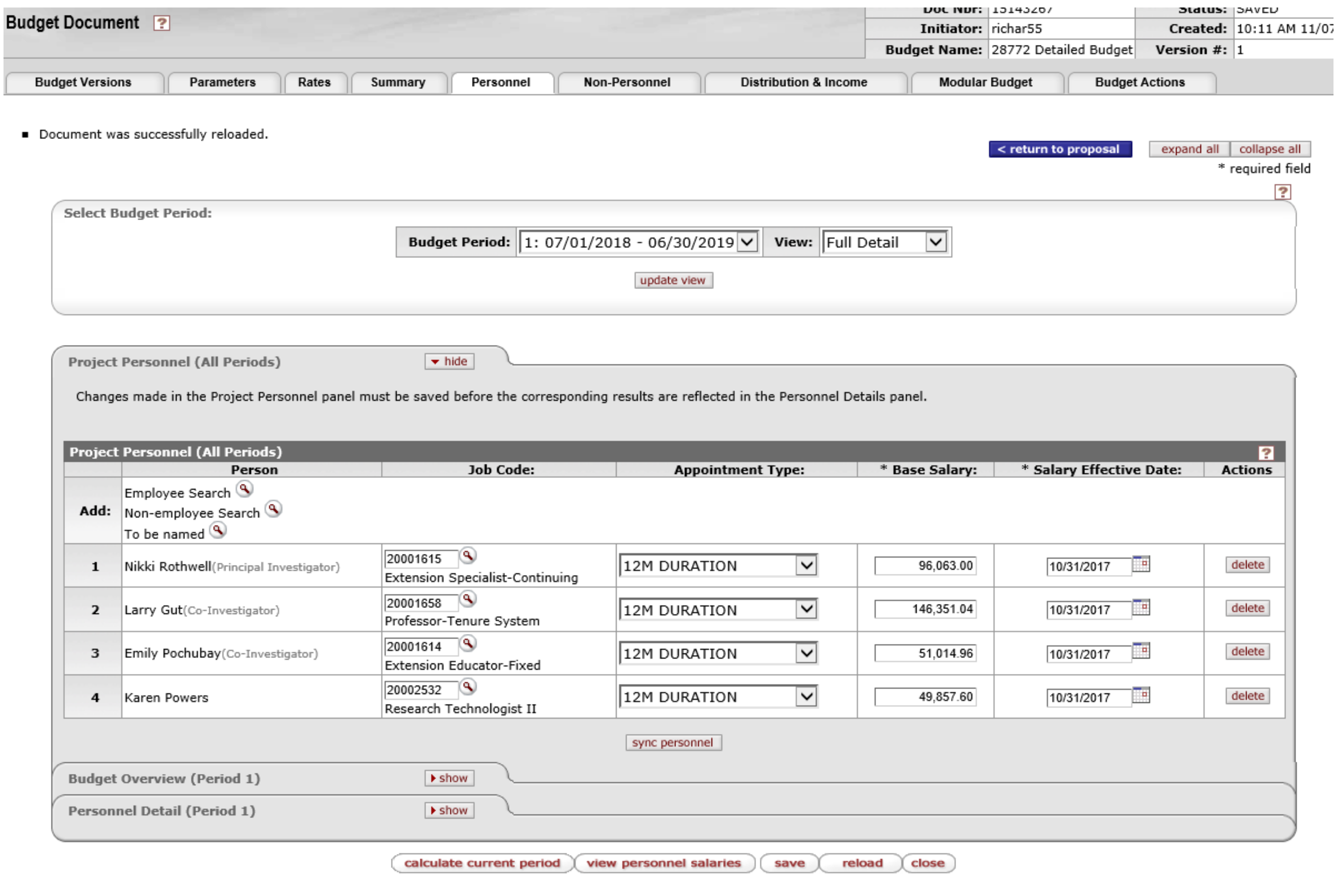
Budget Overview (Period 1) panel

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.

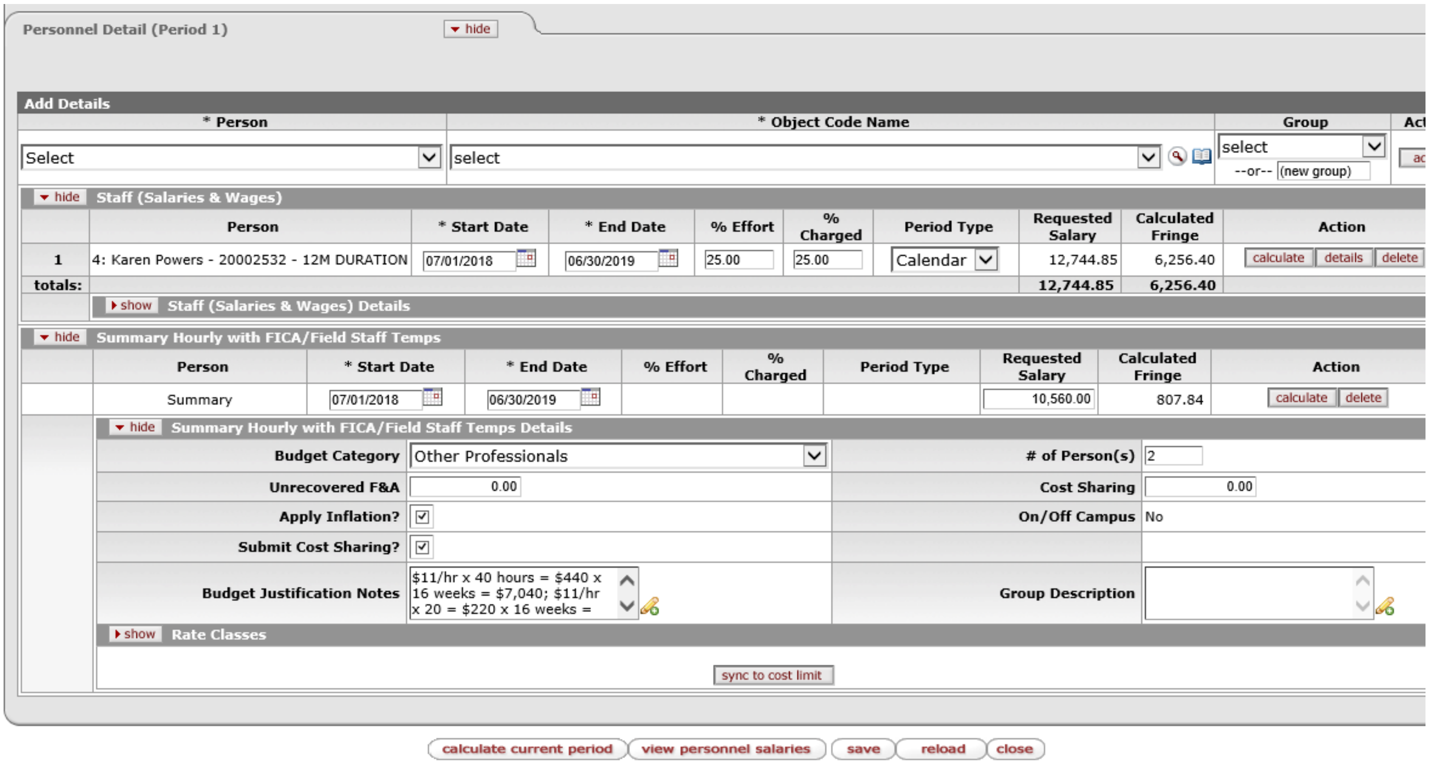
Personnel Detail (Period 1) panel

- 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:



- **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.



- **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

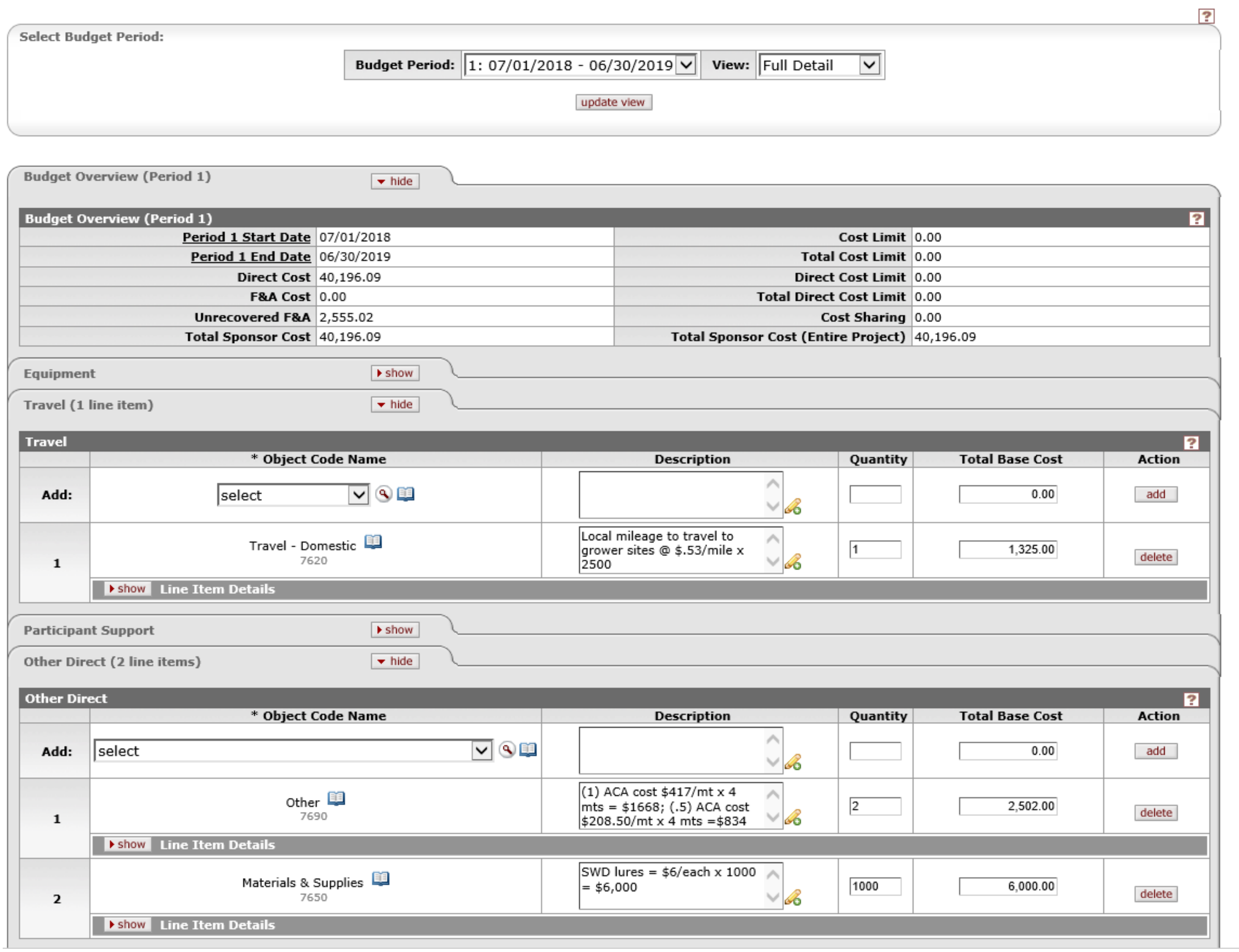
The Participant Support section is used to identify participant support-related costs for your proposal budget, specify details about them, and add them as numbered line items with expandable details that may be viewed.

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.



Distribution and Income

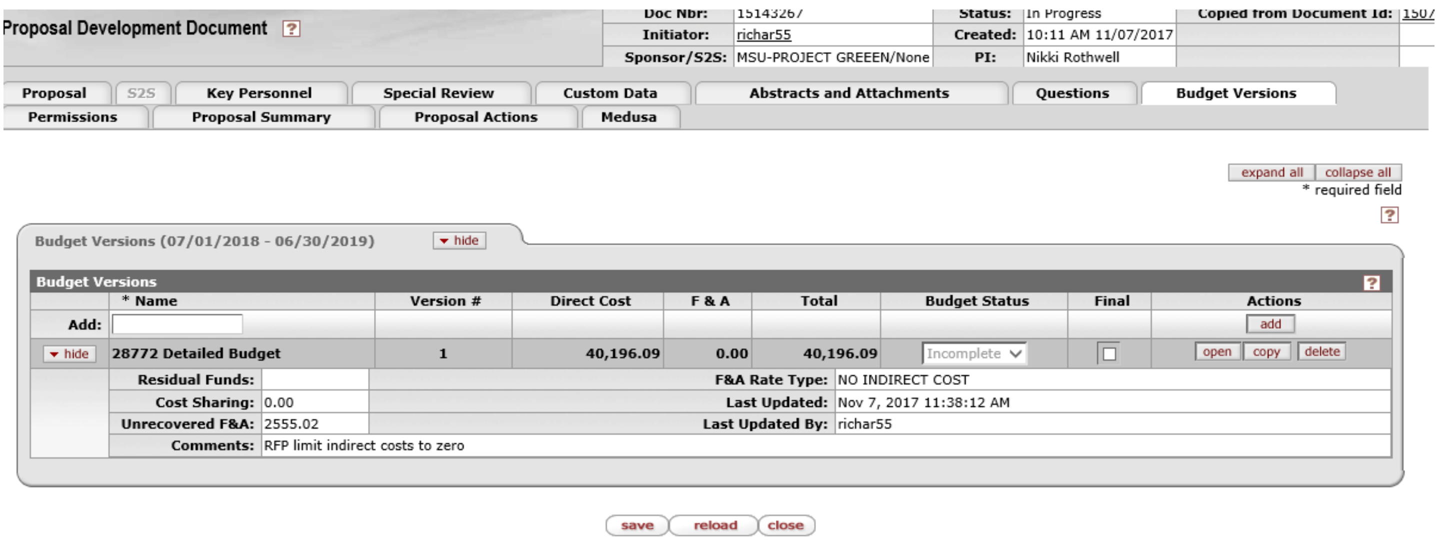
What do we want to put here?

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 -

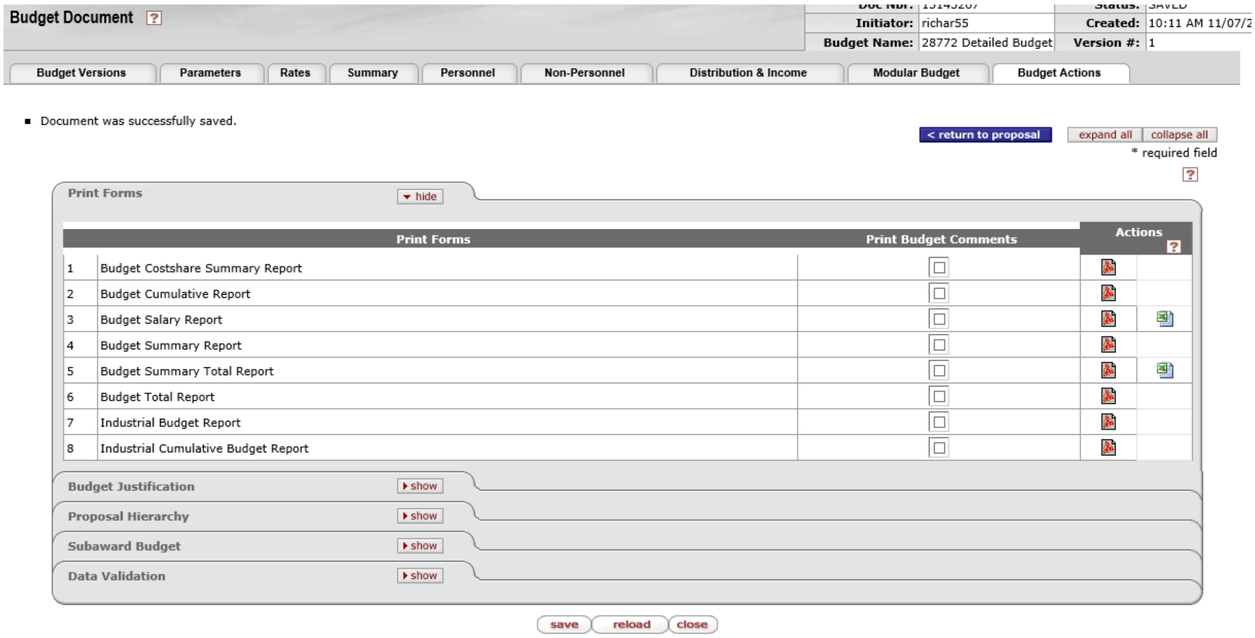
Note you can create multiple budgets in here to explore different budget scenarios. Once you are done you will need to check the **FINAL BOX** back on the Budget Versions panel. However, DO NOT change the BUDGET STATUS field to complete; only OSP can do that once they have reviewed the budget. When you 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.



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.



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

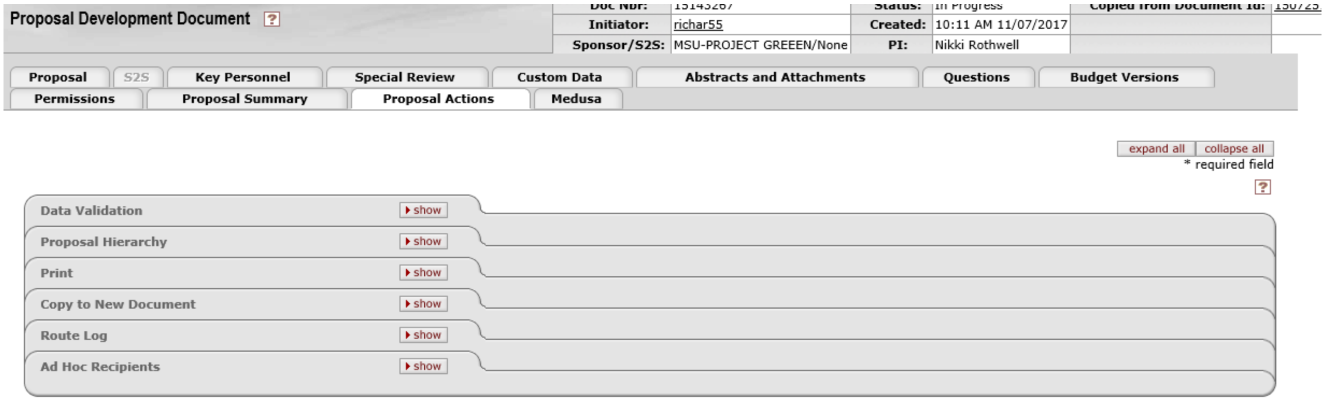
BLUE BOX AT TOP OF PAGE (it's on each page in this budget document)

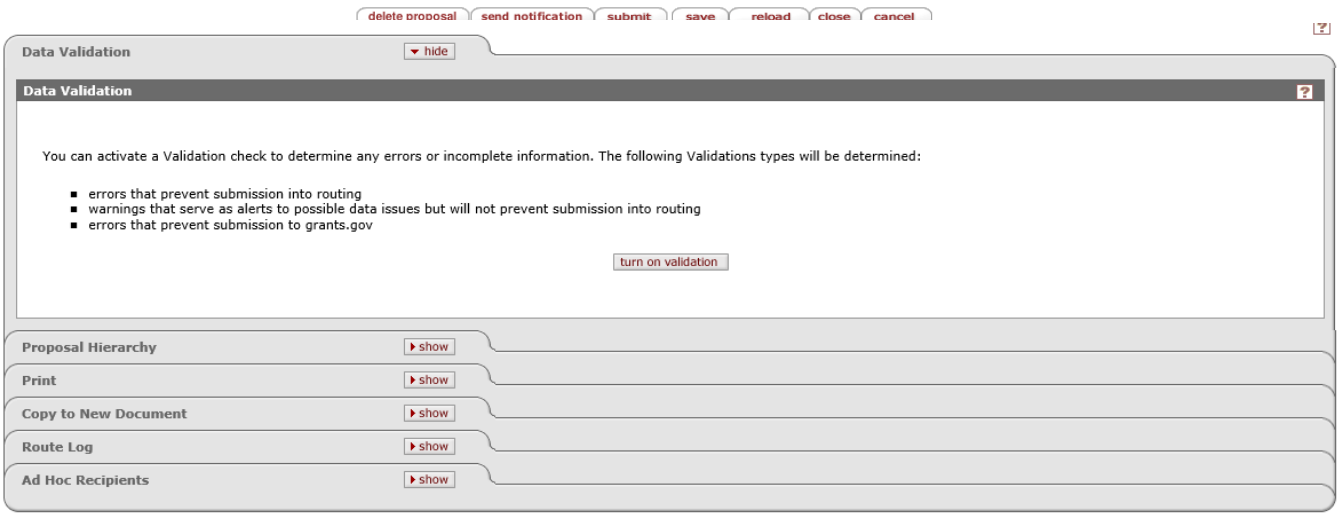
When you are done in the Budget tabs, be sure to Save. Then, if you select the blue "**return to proposal**" button, you can go to the Proposal Actions tab.

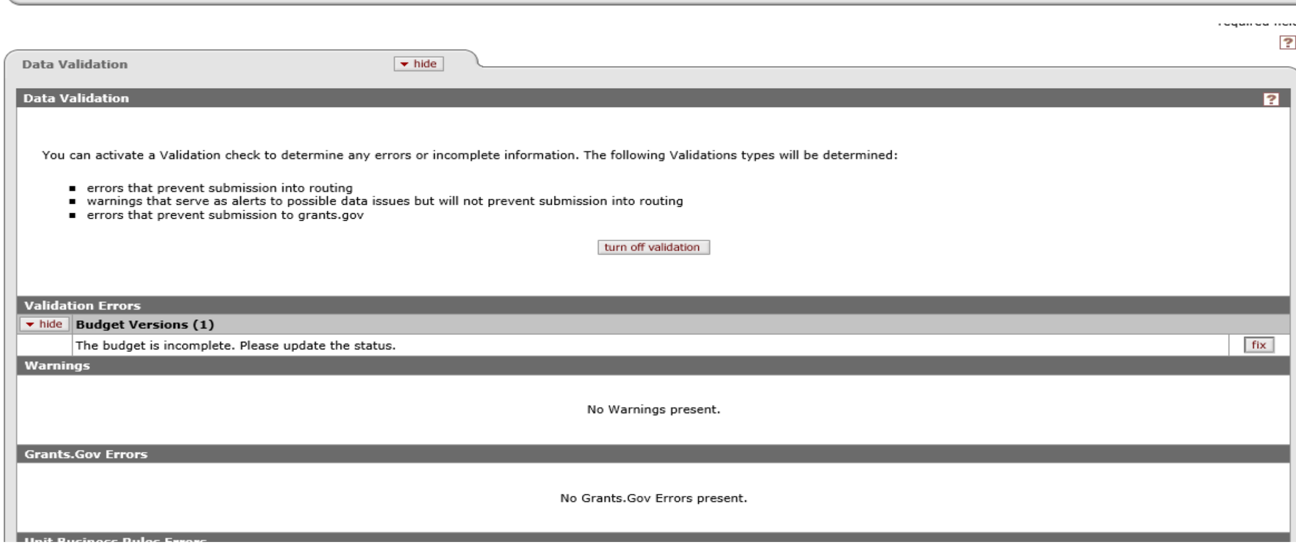
Proposal Actions

Data Validation Panel –

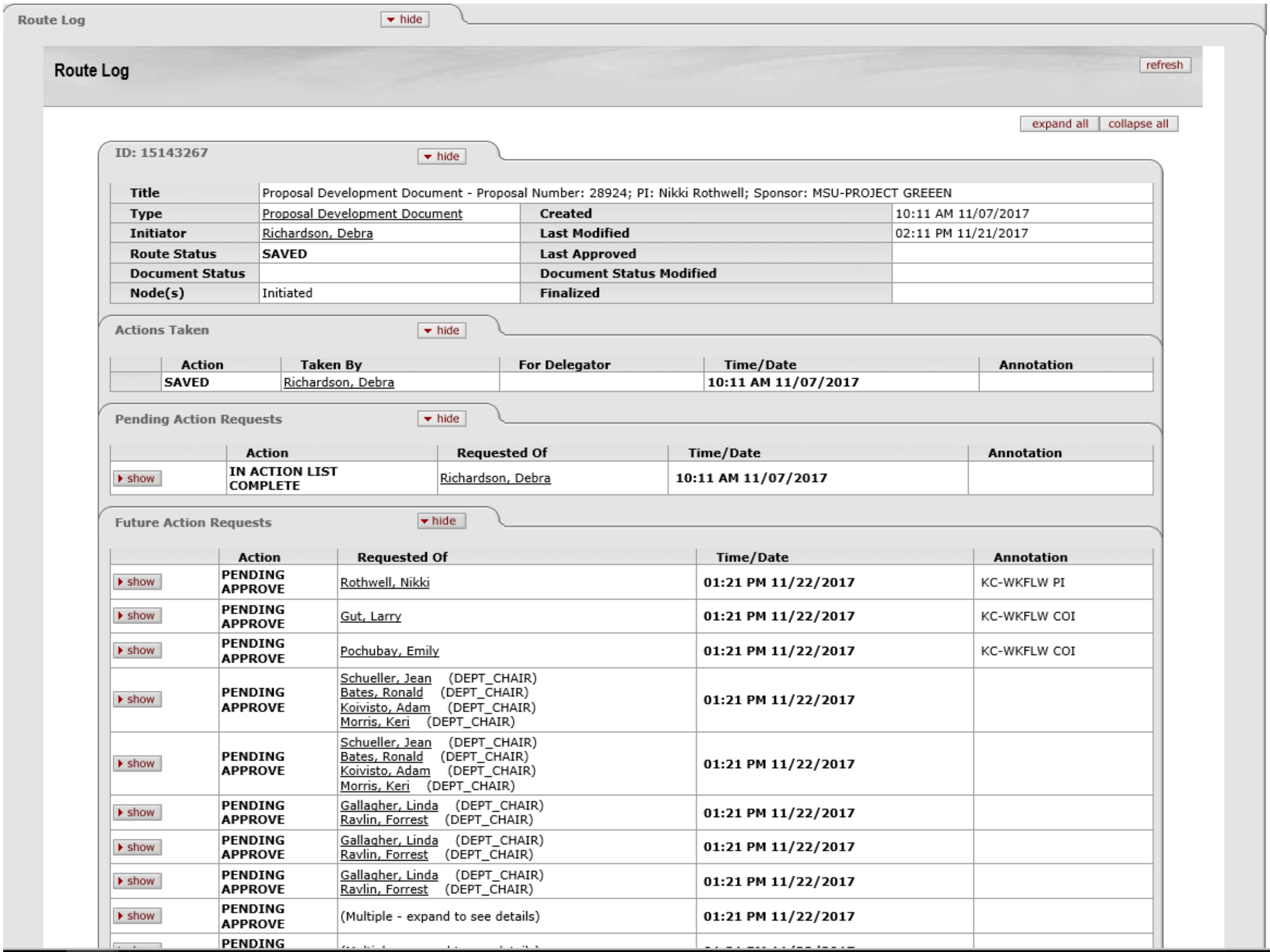
Select the **"show"** button and then in the middle of that first panel you will see a **turn on validation** button. Select this, and it will show you any errors or warning notifications. You should receive the error of "budget is incomplete, please update the status". **DO NOT SELECT THE FIX BUTTON.**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







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

Route Log

ID: 15143267

Title	Proposal Development Document - Proposal Number: 28924; PI: Nikki Rothwell; Sponsor: MSU-PROJECT GREEEN		
Type	Proposal Development Document	**Created**	10:11 AM 11/07/2017
Initiator	Richardson, Debra	**Last Modified**	02:11 PM 11/21/2017
Route Status	SAVED	**Last Approved**	
Document Status		**Document Status Modified**	
Node(s)	Initiated	**Finalized**	

Actions Taken

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Richardson, Debra		10:11 AM 11/07/2017	

Pending Action Requests

	Action	Requested Of	Time/Date	Annotation
show	IN ACTION LIST COMPLETE	Richardson, Debra	10:11 AM 11/07/2017	

Future Action Requests

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

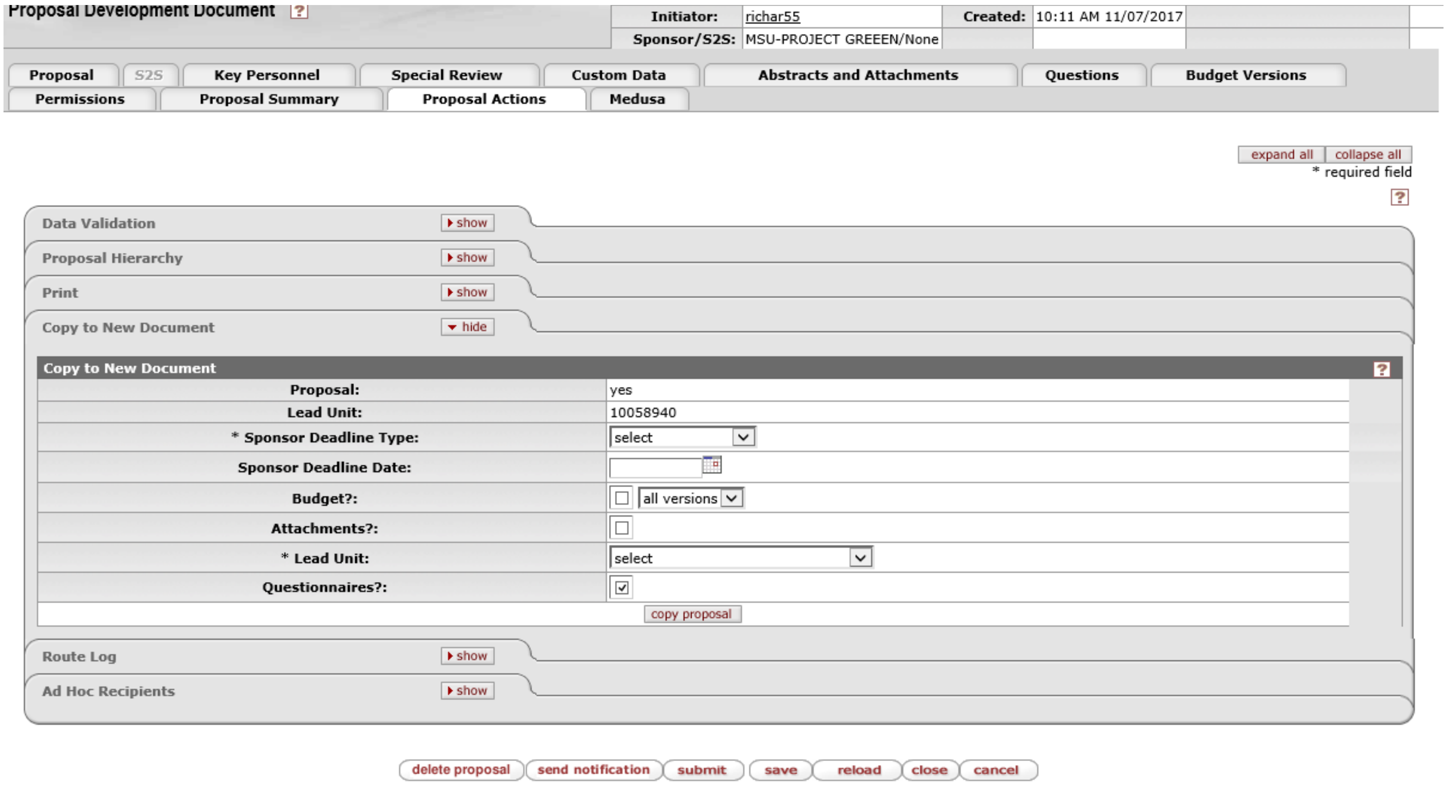
Proposal Number:	28924
Proposal Type:	select
Proposal State:	select
Investigator:	
Project Title:	
Sponsor Deadline Date From:	
Sponsor Deadline Date To:	
Target Date From:	
Target Date To:	
Sponsor Code:	
Sponsor Name:	
Prime Sponsor:	
Parent Unit ID:	
Unit ID:	
Unit Name:	
Award ID:	
Grants.gov Opportunity:	
CFDA Number:	
Hierarchy Status:	

search clear 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
edit view copy medusa	28924	New	In Progress	Modifying the Landscape to Reduce Spotted Wing Drosophila (SWD) Populations in Michigan Orchards.			018650	MSU-PROJECT GREEEN		Nikki Rothwell	Larry Gut; Emily Pochubay		10058940	EXT AG AGRIBUSINES	01/08/2018	01/08/2018	07/01/



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**.