

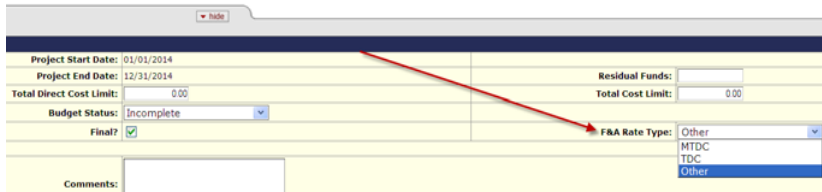




Kuali Coeus Proposal Development Document: Reminders for Initiators and Approvers. These are frequent errors that may be reasons for Minor/Major Return from SPA Officer. Please remember to double-check these fields to minimize review time.


-  **DO** Verify F&A Rate Type (MTDC/ TDC/Other) in the Budget Versions Tab. For sponsors that have indirect cost policies that deviate from UCI DHHS-approved F&A Rates, double check F&A base type.

 **DO NOT** assume F&A Rate Type is MTDC.





-  **DO** Attach **\*ONE\*** complete & compiled proposal package in Abstracts & Attachments tab, Proposal Attachments Panel for every KC Document. – \*Please note: this does not apply to proposals that reside in Fastlane, American Heart Association Grants@Heart Portal, or Proposal Central.


 **DO NOT** attach several separate documents for SOW, Biosketch, Budget spreadsheet, etc. **unless** another Approver in the Workflow(before SPA) wishes to review them as separate attachments.


 **DO** Attach Program Announcement under Internal Attachments Panel. You **DO NOT** need to attach anything (biosketch, other support) to Personnel Attachments panel – SPA does not review this panel. However, you may choose to do so if another Approver in the Workflow needs to review it.


- Proposal tab – **Organization / Location** panel:

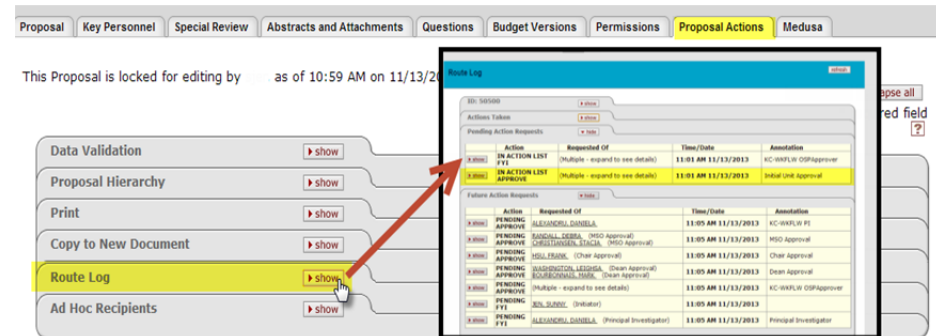
 **DO** use the **lookup** (click the magnifying glass) to search for building name FOR UCI LOCATIONS.

 **DO NOT** enter building name using free text for UCI Locations. Free text should only be entered for off-site locations only, as they are not a part of the UCI Directory.


-  **DO** use MISC SPONSOR code 009850 as a placeholder when creating a KC Doc with a new sponsor.

 **DO NOT** wait until the last minute to submit KC Doc to workflow or hold up routing and approval because you are waiting for a sponsor code.

-  **DO** check the **Route log** (Proposal Actions Tab, Route Log Panel) before asking your SPA Officer for a status update. Oftentimes KC Doc is still Pending Approval from other Approvers, i.e. Initial Unit Review / Chair / Dean.



Action	Requested Of	Time/Date	Annotation
PENDING APPROVAL	ALEXANDER, BARBARA	11:05 AM 11/13/2013	KC-WFLWR OSPApprover
PENDING APPROVAL	ALEXANDER, BARBARA	11:05 AM 11/13/2013	HSD Approval
PENDING APPROVAL	ALEXANDER, BARBARA	11:05 AM 11/13/2013	Dean Approval
PENDING APPROVAL	ALEXANDER, BARBARA	11:05 AM 11/13/2013	Principal Investigator

-  **DO** utilize “Explanation” field on the Proposal Tab, Document Overview Panel to include notes/info that may be useful to SPA Officer.  
*e.g. “sponsor deadline date is Nov 13 as indicated below, but PI would like to submit on Nov 11 if possible,” or “SPA Cover letter needed,” or “SPA needs to complete NYU’s subk commitment form” or “No F&A allowed – see internal attachments for sponsor guidelines prohibiting F&A,” or “Final proposal is uploaded in Fastlane or ProposalCentral for SPA review.”*

