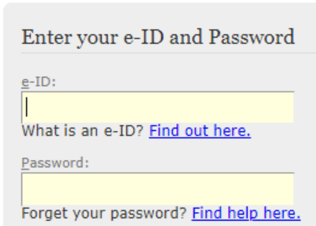
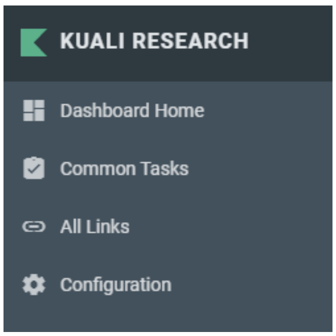
How to Copy a Proposal in Kuali

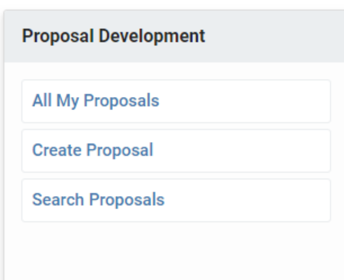
1. Login to Kuali (https://siue.kuali.co/res).



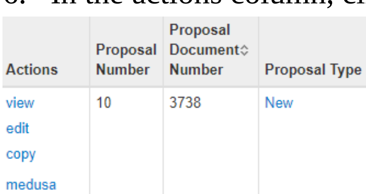
2. Click Common Tasks.



3. Under Proposal Development on the right, select All My Proposals.

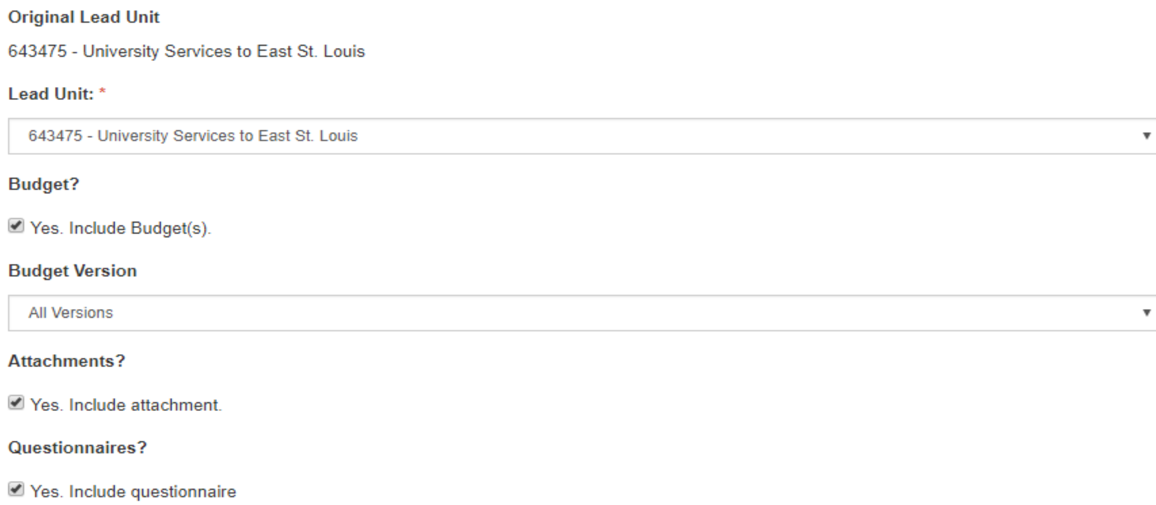


4. Scroll to the bottom of the page.
5. Look for the row of **Proposal Number** you wish to copy.
6. In the actions column, click **Copy.**



Actions	Proposal Number	Proposal Document Number	Proposal Type
view edit copy medusa	10	3738	New

7. For **Lead Unit,** select the unit of the Principal Investigator. This will often be the same as the **Original Lead Unit**.
8. Under **Budget?**, check **Yes. Include Budget(s).**
9. In the **Budget Version** dropdown, select **All Versions.**
10. Under **Attachments?**, check **Yes. Include attachment.**
11. Under **Questionnaires?**, check **Yes. Include questionnaire.**



12. At the bottom of the page, click **Copy.**
13. A copy of your proposal has been created.
14. Note, you will also have to:
    - Complete the Proposal Person Certification (On the left, click Key Personnel->Personnel, and then click the dropdown arrow next to your name. If the PI is a different individual, click **Notify.**
    - Swap out updated attachments, including:
        i. Budget justification and project summary (Attachments-> Proposal tab, and then click Details on the right).
            1. Here are links to templates for these (if needed):
                a. Budget Justification
                b. Project Summary
        ii. Agency guidelines/RFP/solicitation/contract (Attachments->Internal tab, and then click Details on the right).
    - Enter a detailed, line item budget
        i. Budget must match original contract.
        ii. On the left, click **Budget.**
        iii. Click on the name of the budget, and then click **Open Budget Document.**
        iv. On the left, click on the **Rates** tab.
            1. On the **Public Service F & A** tab, ensure that the **MTDC** rate matches the rate from your original proposal.
            2. On the **Fringe Benefits** tab, ensure that all applicable rates on this page match those used in your original proposal.
            3. If the rates in Kuali are different from your original proposal, notify your assigned pre-award associate and send them a list of the rates used for each type.
        v. Enter personnel and non-personnel costs, as needed.
        vi. When finished, click Complete Budget at the bottom of the page, and then check **Is this budget ready to be submitted to the sponsor?** Then, click OK.
        vii. On the left, click **Return to proposal**.

- Run data validation to check for errors
    i. In the center right of the screen, click 

    ii. Then, click Turn On.
    iii. Click fix it for any errors that appear.
    iv. Warnings are just FYIs.
- Notify your Research Associate that the proposal is ready for review.
    i. When given the OK by your Research Associate, on the left, click Summary/Submit, then Submit for Review. Click Submit with Warnings (if applicable).