Introduction

This is a step-by-step guide on how to create and submit for approvals, an S2S (System-to-System) Grants.Gov Proposal in Kuali.

Log into Kuali, then click Create Proposal located in the Research Menu Group.

Another Researcher menu option, “Create Proposal for S2S Opportunity” will give the user a view of all the forms available for a particular Opportunity. If using this option, user can then click “Create Proposal” with the Forms Package for this Opportunity.
Create Grants.Gov S2S Proposal

After clicking “Create Proposal” option, the user will see the 7 required pieces of information needed to access the rest of the proposal development document.

Let’s take a closer look. There are the 7 required data elements to create a new proposal. The red asterisk designates that the data is a required field.

Note that many data elements have a dropdown arrow to the right of the data to help create the proposal. Select from the dropdown list.
1. **Proposal Type** identifies the status of the Proposal

2. **Lead Unit** is the department working on the proposal. If more than one department/unit is involved, name the department that will be administering this project. This will be the department used in the Financial Accounting System (FAS). Once established, this unit cannot be changed.

3. **Activity Type** is the type of research being performed. Select activity type from the dropdown arrow:
   a. **Research** is directed toward 1) increasing knowledge in science, 2) designing, developing, or testing of specific items or processes, or 3) determining the potential of discoveries in technology, materials, processes, methods, devices or techniques.
   b. **Training/Instruction** are projects that incorporate teaching as a main objective.
   c. **Other (e.g., Service)** involves the performance of work other than instruction/training or research. Examples of such projects are health and community service projects.
   d. **Type of application** routing form is not required for noncompeting continuations. Revision/medication means any variation in scope or budget exceeding 25% of the original proposal.

4. **Project Dates** should include the entire duration of the project, beginning and ending dates. Note that the project may span across fiscal years.

5. **Project Title** is what the proposal is named; this is the formal title submitted.

6. **Sponsor** is the organization awarding the funds directly to UMBC. In the Sponsor field, start entering the Sponsor name to view the smart search list of sponsors. If the Sponsor does not immediately come up on the search, use the search icon.

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1 For S2S Grants.Gov, must be a Federal Sponsor solicitation. Note: to request any new sponsor, contact OSP at ospa@umbc.edu
7. Once each of these fields have been completed, click **Save and Continue**.

Review the Proposal Details and make any adjustments if needed. Remember that the Lead Unit cannot be changed.

Click **Save and Continue** at the bottom of the screen to go to the next panel of data entry.
Select Opportunity and Forms Package

1. From the S2S Opportunity Search Panel, Click Find an opportunity.


3. From the Search Results, select the FORMS Package (Competition Id.) appropriate for the proposal.
Kuali System will return the Opportunity and Forms Package selected. Verify that this is the proper Opportunity ID. Note that not all Opportunities and Forms are available in Kuali. Remove or change Opportunity, if needed.

**Forms**

Under the Opportunity Search click on the **Forms** Tab.

Mandatory forms are listed and automatically included with the submission. Optional forms are not included and users will make the determination whether or not to include the forms if applicable. Click the **Include** box if form is available and is needed.

If the form is unavailable, download the form from Grants.gov. website, manually complete the form and upload using the **User Attached** forms tab.
Other Proposal Data

1. Navigate to the Sponsor & Program Information and enter the highlighted data fields:

![Sponsor & Program Information](image)

2. Search for and add Personnel, including PI, Key Persons, same as is done for non-S2S proposals.

![Key Personnel](image)

3. Navigate to the Personnel’s Organization Tab, and, if missing, enter the personnel’s Office Phone.
4. Navigate to the **Questionnaire** Panel and answer the questions in all the Questionnaires, S2S and UMBC. Questionnaires will be marked *(Complete)* when finished.

**Create S2S Budget**

1. Create a new detailed budget (same as non-S2S budgets.)

![Assign Personnel to Periods](image)

3. Add Non-Personnel Cost budget line items.

![Non-Personnel Costs](image)

4. **Autocalculate** all periods.

5. If proposal contains a subaward, while in the budget, click on the **Subawards** panel. Click Add Subaward button and enter the Organization ID, and File Name. Use the standard RR_Budget_1_3_A30-V1.3, or another appropriate pdf. Then click the Add Subaward button. Adding the form will automatically format the subaward details page.
6. **Complete Budget**, and then **Include Budget for Submission**.

![Budgets Table]

### Forms and Attachments

Kuali will prompt the user on which attachments and forms will be required to the opportunity selected.

1. **Turn on Data Validation**

![Data Validation Table]

2. **Note Errors.** There are Regular **Errors** and **Grants Gov. Errors**. Both error types must be resolved before the proposal can be submitted for approvals.

![Data Validation Errors Table]
3. Add the attachments required for this opportunity. Note that the attachment dropdown list will contain S2S form types.

![Proposal Summary](image)

**Submit for Approvals and View Route Log**

After all errors have been resolved, navigate to **Proposal Summary** Panel and Click **Submit for Review**. Look for the message “document was successfully submitted”.

Click View Route Log.
S2S proposals are routed the same way non-S2S proposals are routed for signatures. Here is an example.

Note that after proposal is fully reviewed and signatures are obtained, the OSP Grants & Contracts Manager will submit the proposal to Grants.Gov using the Submit to S2S action button. This is the direct link to Grants.Gov.

**View and Print Forms**

Forms and Sponsor Form Packages will be populated with the information supplied by Kuali to Grants.Gov.

1. Click on Print Menu option at the top of any screen
2. Open Grants.Gov or Forms Package PDF to Print

3. Select PDF’s to print and click **Create PDF**

View and/or print PDF forms as needed. Here are some examples: