

The background is a solid teal color. In the upper left, there is a close-up, angled view of a white computer keyboard. In the lower left, there is a dark, possibly black, object that looks like a laptop or a tablet. In the bottom right corner, there is a black pen or pencil, angled diagonally.

kuali

SPONSORED PROGRAMS

Provide comprehensive grants management support with our modular software.

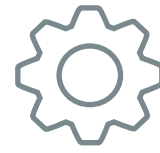


Introduction

Securing grants to support research and discovery, and to give students the opportunity to participate and learn, is a critical activity at many institutions of higher education. Our modular software provides comprehensive grants management support throughout the project lifecycle to ensure efficiency and compliance. Whether you are an investigator, a departmental administrator, a central office administrator, or a leader responsible for the stewardship of your institution's research portfolio, Kuali Sponsored Programs has features to meet your needs.



Overall Features



● INTUITIVE INTERFACE

It's important for any software to be easy to use. Kuali puts a premium on designing a great user experience. That means more than just creating a beautiful interface, though that's definitely part of it. But the key to creating an experience for users that drives engagement is to create simple, natural, human-friendly workflows within a highly performant system. Simply put, it's a software system that makes sense, so it's not going to require hours of training and brain power recalling what to do next while moving through the process.

▶ **Case Study: USU**

● HELP TEXT

Kuali screens guide users through the process. Text can be created to suit each institution's processes and be specific to unique terminology.



● DASHBOARDS

Each user has their own dashboard that consolidates proposal and award information and action items. The dashboard highlights tasks and workflow items requiring the user's attention. It focuses on work with upcoming due dates, approval requests, and in-progress documents.

▶ **Demo: Dashboards**

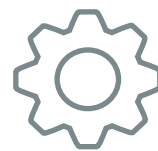
● SAAS TECHNOLOGY

We focus on anticipating your needs and staying on top of changing government regulations and policies, and then articulating those changes directly to you. With software that's truly in the cloud, you're able to activate new features in real time, and automatically update to ensure you are working with the most current information at any given moment.

▶ **Case Study: UMB**



Overall Features



REPORTING

Kuali's powerful reporting capability provides preconfigured reports to answer key questions about your institution's research portfolio: how many? How much? From where? What characteristics? Over what time period? And to take you beyond the basics, schools can develop their own custom reports using any data captured in the system. Analyses short and long-term trends, identify opportunities for efficiency, track funding metrics, find patterns, manage workload -- in short, use your data to support the critical decision-making necessary for your success. You can even publish reporting dashboards to campus and schedule the delivery of reports to end users.

► **Kuali Research Reports**

COMMUNITY

You don't have to do it alone. We foster collaboration within our active community of people just like you, working together to find solutions. We're with you every step of the way, from kick-off to go-live, sharing ideas and providing support to solve problems together. Our products evolve as our users champion the changes they need most. We've been where you are, so we know what you're up against. And we're with you all the way.

► **Case Study: CSU**



Pre-award



PRE-AWARD

This is where it all begins. Preparing a proposal for submission involves a lot of different people and information gathering, all on a very specific timeline. Kuali's Pre Award module manages the process from start to finish, helping investigators and administrators collaborate to produce high quality proposals that are compliant with sponsor and institutional requirements.

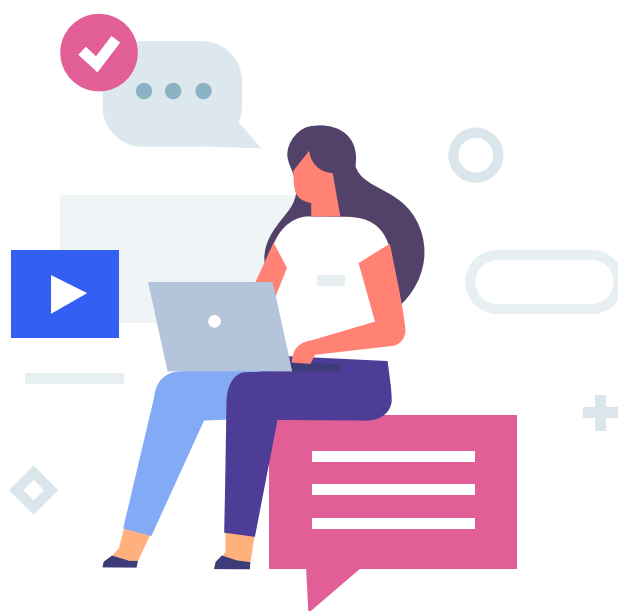
 **Demo: Pre-award**

access to a staffer to assist. Department-level roles give leadership access to all proposals within a particular school or department.

Kuali isn't just for highly trained system administrators. PIs and casual users can easily log in on-line from anywhere and understand what actions are required without extensive training. There is no limit on how many people can access, so collaborating to put together a proposal has never been easier.

CONVENIENT ACCESS AND COLLABORATION

Because the system is hosted in the cloud, it is accessible from anywhere with internet access and a modern browser. All users have a single sign-on authentication or Kuali's internal authentication, and role-based profiles can be assigned as necessary. PIs can also designate

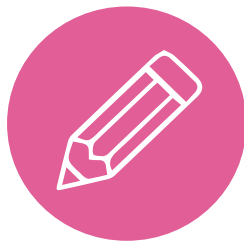


Pre-award



AUTO-FILLED FIELDS

Investigators don't need to spend time re-entering data. Kuali pulls in Person and Organization information via an integration with your institution's authoritative source of that data, saving time and reducing the margin for error.



CONFIGURABLE VALIDATIONS

To help keep proposals moving through the process, Kuali has built-in errors and warnings so you know what needs to be fixed, and proposals don't get stuck. The system comes ready with Grants.gov and NIH Commons validations, and schools can also develop their own complex validations to accommodate specific institutional processes.

SINGLE POINT OF ENTRY

Kuali provides a single, simple, user-friendly interface for all users, whether you're entering detailed information or reviewing and approving proposals. Regardless of sponsor – federal, state, private, industry, even Grants.gov S2S submission – there's no need to interact with multiple forms, formats and versions. Just one familiar interface, every time. Kuali takes it from there.

NEGOTIATIONS

Track and manage negotiation activity related to an industry-funded agreement, unfunded agreements, or any other locally defined processes, and link negotiation records to proposals, awards, or sub-awards.



Pre-award



● CONFIGURABLE WORKFLOW

Kuali provides a powerful workflow engine to allow schools to configure a variety of specific workflows to meet local institutional needs. Add individuals, roles or groups involved in reviews, approvals, or committees, to keep the proposal moving through the process. Sequential approvals? Parallel approvals? Workflow triggered based on specific data elements within the system? No problem! Kuali's workflow is designed to meet routing requirements for both complex and simple scenarios.

And because we know that sometimes, the hard stuff takes a little longer, your technical narrative and other proposal attachments can be modified while the overall proposal routes for approval (if your institution allows that!).



● NOTIFICATIONS

Notifications can be set for proposal creation, completion of certifications, reminders, and, of course, when an action is required. Administrators will know where proposals are in the process, and investigators and those involved in preparing the proposal will know when something is required of them.

● DOCUMENTATION GATHERING

Gathering all the documentation and information needed to submit a proposal can be a daunting process. Kuali makes it easy for investigators and others involved in the proposal development process to pull together the necessary information so it's clear and in the required format.



▶ Workflow Routing



Pre-award



● CONFIGURABLE QUESTIONNAIRES AND SUPPLEMENTAL INFORMATION

Kuali allows schools to configure questionnaires and other data entry fields to gather information needed either internally or to meet unique sponsor requirements.

● S2S SUBMISSION

Kuali connects directly with Grants.gov for seamless submissions. Built-on system validations and the use of standard, institutionally-configured identifiers ensure success. Users submitting information aren't required to know the ins and outs of the specific forms. Interact with the same, familiar interface every time, and Kuali handled mapping the data to the appropriate spot on the sponsor forms.

▶ More Info in S2S Forms

● BUDGETS

Create simple summary budgets or complex budgets using standard, institutionally-configured F&A and fringe benefit rates. Load salary information so that it's available within the system for those with appropriate permissions to view and use. Enter one year and automatically generate future years with configured inflation rates. Set up cost limits, track cost sharing, and capture program income. Kuali provides the tools you need to make budgeting a breeze. Best of all, if a proposal is funded, the budget can be brought forward to the Award module to form the basis for award budget maintenance.



Pre-award



TRANSPARENCY

The process of moving a proposal through the Pre Award module is completely transparent. Each proposal is given a Proposal ID at the time of creation so each one can be easily tracked. Administrators will be able to see where all proposals are at any given time, and each user will be able to check in on the proposals to which they are connected. Plus, administrators or other leadership can see who's working on the proposal to make sure the workload is balanced.

Post-award



POST-AWARD

Once a proposal is funded, key proposal data can be copied forward into the Award module to make award set-up and account creation simple and straightforward. Capture the award data necessary for management, and track activity over the full life of award through award closeout, including modifications, increments, supplements, continuations, renewals, and no cost extensions. Leverage configurable validations to ensure that data is entered correctly.

▶ Demo: Post-award



Post-award

SPONSOR TEMPLATES

Configure standard sponsor templates to save data entry time when setting up awards from your school's most frequent sponsors. Automatically load contact information, terms and conditions, required deliverables, and other standard information.

AWARD HIERARCHY

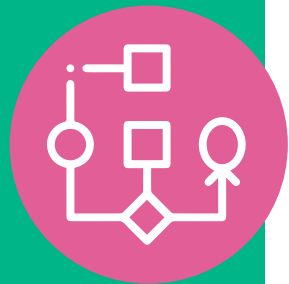
Kuali's powerful award hierarchy feature allows the creation of parent and child award relationships. Manage data and funds separately in cases where there are task orders under a master agreement, carry-forward isn't automatically approved, different aspects of the project are under management by different PIs, or any other local situation requiring this separation. Child awards roll up under a single parent for streamlined reporting.

▶ [Award Hierarchy Webinar](#)



WORKFLOW

Leverage the same powerful workflow capability available in our pre-award module to manage award review and approval. Create simple or complex workflows, send notifications, and track approval statuses with ease.



DOCUMENTATION MANAGEMENT

Award notices, modifications, sponsor approvals, internal communication and other key documentation can be stored with the award record for easy retrieval and access. Replace your paper files and keep everything together in one place.



Post-award



● AWARD BUDGETS

Pull detailed budget information forward from a proposal, or start from scratch. Leverage standard institutional rates, track cost sharing commitments, and even route award budgets for approval separately from the remainder of the award information. Track the addition of new funding or re-budget funds over the life of the award.

● SEND NOTICE OF AWARDS FROM SYSTEM

Send notification of award setup directly from the system. Let investigators know that their funds are available and their work can begin. Highlight key information to ensure everyone working on the project is aware of their responsibilities.



Integration with Financial
System for Account
Creation and Maintenance

The Kuali awards module integrates with your institution's financial system for automated, streamlined account creation and modification. All data stored in the Award module, including award budget data and data elements configured to meet local institutional needs are available for retrieval and processing by your local financial system.



Post-award



● AWARD REPORT TRACKING

Capture information about reports and other deliverables due to the sponsor, along with due dates and responsible submitters. Configure notifications to be sent out at intervals reminding investigators and others that reports are coming due. Track and report on submission status.



● SUBAWARDS

When pieces of a research project need to be handled by outside labs and investigators, manage your institution's outgoing subawards with Kuali's Subaward module. Sync data from other parts of the system, generate populated FDP templates, track FFATA reporting, and create subaward invoices.

● COMPLIANCE

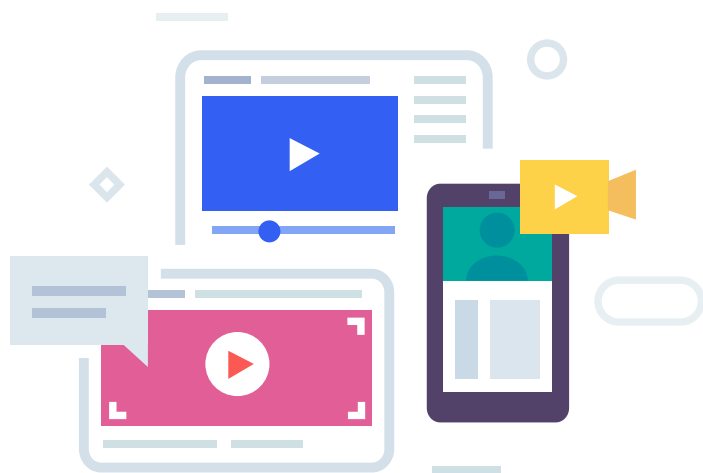
Integrate with the Kuali Compliance modules to track documentation and approvals for investigator financial conflicts of interest, as well as human and animal protocols. This connection allows for all pieces of the award to be managed together.



Post-award

MEDUSA

Kuali's unique (and uniquely named!) Medusa feature provides a visual representation of all the components of a research project linked together within the system. Navigate easily between an award, its associated proposal, and any linked outgoing subawards or negotiation records to access critical information quickly and easily.



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We invite you to learn more about Kuali and how
we can impact your protocol processes,
please contact ask.kr@kuali.co



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