Institutional approval must be granted for proposals to be submitted to a sponsor. At MSU, institutional approval is obtained through a series of intermediate approvals, beginning with the investigators named in the proposal and ending in the Office of Sponsored Programs (OSP), Business Connect (BC) or Contract and Grant Administration (CGA). This job aid details how to find the information in KC, what information is to be reviewed at each stop and how to take the desired action (whether to approve the proposal, disapprove the proposal or reject the proposal for revisions).

WHO:

- Project Investigators/Key Personnel
- Academic Chairs, Deans, or designees
- International Studies and Programs (ISP) Administrators
- Office of Planning and Budgets (OPB) Administrators
- University Advancement Administrators

WHEN:

Upon notification that you have a proposal development document to review

HOW:

Accessing the desired proposal

1. Click on the Action List button located at the top left of the screen
2. Click on the number in the Id column next to the proposal you wish to review. KC will open the proposal and display the Proposal Summary screen

3. Proceed to the section appropriate for your review:
   a. Project Investigators/Key Personnel (Pages 2-5)
   b. Academic Chairs, Deans and their delegates (Pages 6-9)
   c. International Studies and Programs (Pages 9-11)
   d. Office of Planning and Budgets (Pages 12-13)
   e. University Advancement (Pages 14-15)
Project Investigators/Key Personnel

1. Follow the Accessing the desired proposal section above to locate the proposal you wish to review and approve

2. Select the Key Personnel Tab at the top of the page

3. Click the show button to expand the panel adjacent to your name to view subpanels including the Proposal Person Certification questionnaire

4. Click the show button on the Proposal Person Certification subpanel and answer all questions presented

5. Click the save button to secure your responses

6. Select the Proposal Summary tab at the top of the page

7. Review all information located in the Proposal Summary tab

Note: Once you have completed your review of the information on the Proposal Summary panel and subsequent panels and subpanels, you may wish to click hide on the various panels and subpanels before moving on to the next panel to allow for greater focus in each of the areas to be reviewed.
8. Click the *show* button on the **Budget Summary** panel and review all information located in each of the subpanels; **Budget Periods, F&A, F&A Allocation Summary and Budget Reports**

9. To review the budget in greater detail click the *show* button on the **Budget Reports** subpanel and click the *Print* button corresponding to the **Budget Costshare Summary Report**. The system will open the summary report displaying a detailed budget. The budget displayed can also be saved or printed, using the save/print functions within your browser. Note: if the Budget Module within KC was not used to create the budget you may review the attached detailed budget by following the instructions listed below for viewing attachments in the **Attachments** subpanel.

10. Click the *show* button on the **Key Personnel panel**; click the *view* button to display the answers to your **Proposal Person Certification** questions to ensure the responses are accurate (repeat steps 2-5 above, if you notice an error)
11. Click the show button on the Combined Credit Split subpanel to review F&A Allocation, Space, and Post Award Unit distributions are accurate.

12. Click the show button on the Custom Data Information panel to review the total amount of Voluntary Cost Share committed in the proposal; if no voluntary cost share has been committed, this panel will be blank.

13. Click the show button on the Questions panel to see the questionnaires for the proposal. Click the show button for each subpanel that appears to review the questions and responses in each.

Note: You may click on more information to the right of each question to view additional information about the question.

14. Click the show button on the Attachments panel to view any attachments for the proposal. The attachments may include the detailed budget (if the budget was not created in the KC Budget Module) or items such as a scope of work, any subcontract commitment forms, or budget justification, etc.

15. Click the show button on the Keywords panel to view the country(s) that have been added. Note that the Keywords panel will only appear on the Proposal Summary tab if a keyword has been added within the proposal.

16. Click the show button on the Data Validation panel and click the turn on validation button to reveal any warnings; doing so may lead you to explore the proposal further. For example, you may see the following warning message “A Non-Reg. PI exception approval is required for the lead PI” and want to check to see if the user has uploaded the Non-Standard PI Approval document in the Institutional Attachments area.

17. Click the show button on the Print panel to view and/or print the Grants.gov or generic forms associated with your proposal. To print Grants.gov related forms, click show on the Print Grants.gov Forms subpanel and place...
checks in the boxes to the right of the forms you wish to print and then click the **print selected** button.

18. Following the completion of your review select the appropriate action button at the bottom of the screen to advance the proposal.

   **Note:** Be sure to pay particular attention to the statement, located directly above the action buttons:  
   *Approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilities/space have been discussed with the appropriate people, contributions listed will be met by the department/college unless otherwise approved, that Conflict of Interest requirements have been addressed, and that Sponsored Programs may process the proposal.*

![Print](image)

- **Selecting approve** indicates agreement with the information provided and advances the routing Proposal Development Document to the next reviewer

- **Caution!** Selecting **disapprove** will prevent any further actions or approvals from occurring. The individual who disapproves the proposal will need to provide their rationale for the disapproval in the comment box to complete the process. No further changes or modifications to the proposal will be permitted. The disapproval option should **rarely** be used and should only be selected for proposals that **will not** be submitted to a sponsor

- **Selecting reject** indicates the proposal requires additional information or corrections in order for the reviewer to approve. The reviewer who rejects the proposal will need to provide their rationale for the rejection in the comments box to complete the rejection process (see below). Rejected proposals will return to draft status, allowing the initiator to make revisions and approve the document changes reinitiating the review and approval process.
If you select reject to return the proposal for corrections, you will be required to do the following:

a. Click on the Proposal Actions tab

![Proposal Actions Tab](image)

b. Enter the reason in the Rejection Reason field; it may be beneficial to specify the changes required for eventual approval

C. Click yes

**Academic Chairs, Deans, or Delegates**

1. Follow the Accessing the desired proposal section above to locate the proposal you wish to review and approve

2. Review the information located in the Proposal Summary panel.

   a. Note: Once you have completed your review of the information on Proposal Summary panel and subsequent panels and subpanels, you may wish to click hide on the various panels and subpanels before moving on to the next panel to allow for greater focus in each of the areas to be reviewed.

3. Click the show button on the Budget Summary panel and review the information located in each of the subpanels; Budget Periods, F&A, F&A Allocation Summary and Budget Reports
4. To review the budget in greater detail click the show button on the Budget Reports subpanel and click the Print button corresponding to the Budget Costshare Summary Report. The system will open the summary report displaying a detailed budget. The budget displayed can also be saved or printed, using the save/print functions within your browser. Note: If the Budget Module within KC was not used to create the budget you may review the attached detailed budget by following the instructions listed below for viewing attachments in the Attachments subpanel.

5. Click the show button on the Key Personnel panel; click the view button to display the answers to the Proposal Person Certification questions

6. Click the show button on the Combined Credit Split subpanel to review the F&A Allocation, Post Award Unit, and Space distributions
7. Click the show button on the **Custom Data Information** panel to review the total amount of **Voluntary Cost Share** committed in the proposal. If no voluntary cost share has been committed, this panel will be blank.

8. Click the show button on the **Questions** panel to review the questionnaires necessary for the proposal; you will need to click the show button for each subpanel that appears in order to review the questions and responses to each.

9. **Note:** You may click on **more information** to the right of each question to view additional information about the question. Click the show button on the Attachments panel. Three subpanels will be displayed: Proposal Attachments, Personnel Attachments and Institutional Attachments. The number of attachments in each subpanel will be displayed after the subpanel name. Click the show button to display the Attachment Type. Attachments may include the detailed budget (if the budget was not created in the KC Budget Module), scope of work, subcontract commitment forms, budget justification, internal approvals, etc.

10. Click the show button on the **Validations** panel and click the turn on validation button to reveal any warnings for the proposal. For example, you may see the following warning message, “A ‘Non-Reg. PI exception approval’ is required for the lead PI,” which may prompt you to verify if Non-Standard PI approval has been received.

11. Following the completion of your review select the appropriate action button at the bottom of the screen.

**Note:** Be sure to pay particular attention to the statement, located just above the action buttons: **Approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilities/space have been discussed with the appropriate people, contributions listed will be met by the department/college unless otherwise approved, that Conflict of Interest requirements have been addressed, and that Sponsored Programs may process the proposal.**
• Selecting **approve** indicates agreement with the information provided and advances the routing Proposal Development Document to the next reviewer.

• **Caution!** Selecting **disapprove** will prevent any further actions or approvals from occurring. The individual who disapproves the proposal will need to provide their rationale for the disapproval in the comment box to complete the disapproval process. No further changes or modifications to the proposal will be permitted. The disapproval option should **rarely** be used and should only be selected for proposals that will **not** be submitted to a sponsor.

• Selecting **reject** indicates the proposal requires additional information or corrections in order for reviewer to approve. The reviewer who rejects the proposal will need to provide their rationale for the rejection in the comments box to complete the process. Rejected proposals will return to draft status, allowing the initiator to make revisions and approve the document changes reinitiating the review and approval process.
  
  a. Click on the **Proposal Actions** tab

  b. Enter the reason in the **Rejection Reason** field; it may be beneficial to specify the changes required for eventual approval.

  c. Click **yes**

**International Studies and Programs (ISP)**

1. Follow the **Accessing the desired proposal** section above to locate the proposal you wish to review and approve.

2. Review the information located in the **Proposal Summary** panel.
• Note: Once you have completed your review of the information on Proposal Summary panel and subsequent panels and subpanels, you may wish to click hide on the various panels and subpanels before moving on to the next panel to allow for greater focus in each of the areas to be reviewed.

3. Click the show button on the Budget Summary panel and review the information located in each of the subpanels; Budget Periods, F&A, F&A Allocation Summary, and Budget Reports.

4. Click the show button on the Questions panel and on the Standard Proposal Questionnaire subpanel. Here you will find the response to the question, “Does this project include International Activities?”
Note: You may click on more information to the right of each question to view additional information about the question.

5. Click the show button on the Attachments panel to view all of the attachments to the Proposal Development Document. A Project Summary or Scope of Work should be attached either in the Proposal Attachments subpanel or the Institutional Attachments subpanel.

6. Click the show button on the Keywords panel to view the country(s) that have been added. Note that the Keywords panel will only appear on the Proposal Summary tab if a keyword has been added within the proposal.

7. Following the completion of your review select the approve button at the bottom of the screen to advance the proposal.

Caution! Selecting disapprove will prevent any further actions or approvals from occurring. The individual who disapproves the proposal will need to provide their rationale for the disapproval in the comment box to complete
the process. No further changes or modifications to the proposal will be permitted. The disapproval option should rarely be used and should only be selected for proposals that will not be submitted to a sponsor.
Office of Planning and Budgets (OPB)

1. Follow the Accessing the desired proposal section above to locate the proposal you wish to review and approve.

2. Review the information located in the Proposal Summary panel.
   - Note: Once you have completed your review of the information on the Proposal Summary panel and subsequent panels and subpanels, you may wish to click hide on the various panels and subpanels before moving on to the next panel to allow for greater focus in each of the areas to be reviewed.

3. Click the show button on the Budget Summary panel and review the information located in each of the subpanels; Budget Periods, F&A, F&A Allocation Summary, and Budget Reports.

4. Click the show button on the Questions panel and on the Standard Proposal Questionnaire subpanel. Here you will find the response to the question, “Does this project require additional space on or off campus?”
Note: You may click on **more information** to the right of each question to view additional information about the question.

5. Click the **show** button on the **Attachments** panel to see if a space plan has been uploaded in the **Institutional Attachments** subpanel.

6. Following the completion of your review select the **approve** button at the bottom of the screen to advance the proposal.

**Caution!** Selecting **disapprove** will prevent any further actions or approvals from occurring. The individual who disapproves the proposal will need to provide their rationale for the disapproval in the comment box to complete the process. No further changes or modifications to the proposal will be permitted. The disapproval option should rarely be used and should only be selected for proposals that will not be submitted to a sponsor.
University Advancement

1. Follow the Accessing the desired proposal section above to locate the proposal you wish to review and approve.

2. Review the information located in the Proposal Summary panel, paying particular attention to the Lead Unit and sponsor information. (Please note that when sponsor type is Foundation, the system will automatically send the proposal to University Advancement for approval).

   - Note: Once you have completed your review of the information on the Proposal Summary panel and subsequent panels and subpanels, you may wish to click hide on the various panels and subpanels before moving on to the next panel to allow for greater focus in each of the areas to be reviewed.

3. Click the show button on the Budget Summary panel and review the information located in each of the subpanels; Budget Periods, F&A, F&A Allocation Summary, and Budget Reports.

4. Once the review has been completed select the approve button at the bottom of the screen to advance the proposal.
Caution! Selecting **disapprove** will prevent any further actions or approvals from occurring. The individual who disapproves the proposal will need to provide their rationale for the disapproval in the comment box to complete the process. No further changes or modifications to the proposal will be permitted. The disapproval option should rarely be used and should only be selected for proposals that **will not** be submitted to a sponsor.