

KR Tips & Tricks for HS Contacts

Not meant to be comprehensive

KR Record Locks

The following steps are to check if you've locked any records and how to remove the lock(s):

Common Tasks > Quick Links > Locks

Click on the "Search" Button

If any locks are listed under your name:

Click on the "delete" button to the left under "Actions" and it will release the lock

The search process can be repeated to confirm that the lock was removed

Note: you can only see your locks, HS SPPO has access to all locks

Basics

Proposal Details

Proposal Type	New, Resubmission, etc.
Sponsor	Appropriate NIH IC or Name of Institution if we are a sub
Prime Sponsor	NIH/ specific NIH IC (if we're the sub)
Original Institutional Proposal ID	Previous UCSD/IP# for Resubmission, Renewal & Supplements

Note: You will need to create a new KR PD record if there is a revised budget, the Previous IP# will link the applications

Delivery Information

Submission By	OSP
Submission Type	Electronic
Submission Description	Subaward contact name, title and email ASSIST # RPPR/Grant# in eRA Commons Any other additional delivery instructions

Sponsor & Program Information

Sponsor Deadline Type	Options: Hard or Internal
Notice of Opportunity	Unsolicited or Federal Solicitation
Opportunity ID	FOA
Subawards	Yes/True if there are outgoing subawards -- No/False if no outgoing subawards to UCSD
Sponsor Proposal ID	Grant# for resubmissions, renewals, supplements, grants transfers, or RPPRs
Anticipated Agreement Type	Options: Grant (subaward application is "Grant"), Cooperative agreement, or Fellowship
Previous Grants.gov Tracking ID	Changed / Corrected applications

Key Personnel

Note: the PI must certify the record prior to submission

Personnel

Details > eRA Commons User Name add for eRA Commons & ASSIST applications (will be required for S2S to submit)

Organization > Effort

Effort is listed in this section by effort % and personnel appointment type
Example: PI is appointment type calendar months at 5% effort the entry would be "0.05" in the "Calendar Year Effort"

Research Questions

Must be completed by the PI

Delete/Change Key Personnel:

Note: if you delete a key person in this section, it does not remove them from the budget.

Note: Personnel can be moved by the up and down arrows on the right side of the key person, but it does not look like it will change a non-contact PI to a Contact PI.

When changing PIs, make sure you do this: Select them as the PI/Contact and not PI/Multiple. You cannot change their role once added to the Personnel section.

Attachments

Proposal	DO NOT USE
Personnel	DO NOT USE
Abstract	DO NOT USE
Internal	

These documents go in this section:

- Internal Budget
- ASSIST application (Placeholder)
- (UCSD is) Subaward Application
- Salary Waiver
- UC/VA worksheet
- FOA (optional)

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Cost Sharing Documentation

Sub Site Documentation

PIE

If KR is triggering that a PIE is required for an eligible title code: Attach statement PI's title code and percent of salary appointment

Notes

Add any add'l information the SPO needs to know

Examples: LOI requested, sub recipient form, MCA, Cover Letter, etc.

Questionnaire

Space

All questions must be completed

Note: New Space is a Hard Stop

Budget Summary

DO NOT COMPLETE DETAILED BUDGET - summary budget only (like in ePD)

If more than one budget exists in the application see the following instruction

The budget version to be reviewed/submitted must be marked:

"Complete"

"Ready for Submission" (turns the budget row **green**)

Access

Aggregator assigned here. Can add additional aggregators here.

Supplemental Information

COA Org Code must be completed

Summary/Submit

Data Validation is done here

Notifications History

N/A

When you're done working on a record and your work is saved:

You must click on the "Close" button at the bottom of the page, otherwise the record will lock.

To exit Kual Research:

Menu bar > click "logout"