**KR Tips & Tricks for HS Contacts**

*Not meant to be comprehensive*

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**KR Record Locks**

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

1. **Common Tasks > Quick Links > Locks**
2. Click on the "Search" Button
3. If any locks are listed under your name:
   - Click on the "delete" button to the left under "Actions" and it will release the lock
4. 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*

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**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**

- **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

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

- **Delete/Change Key Personnel**: Note: Personnel can be moved by the up and down errors 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**: Internal Budget
  - ASSIST application (Placeholder)
  - (UCSD is) Subaward Application
  - Salary Waiver
  - UC/VA worksheet
  - FOA (optional)
KR Tips & Tricks for HS Contacts

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 Kuali Research:
Menu bar > click "logout"