

Office of Research and Sponsored Programs

**GRANT Forum
Grant Research Administrators' Network
Team**

February 15, 2023

OFFICE OF RESEARCH AND SPONSORED PROGRAMS



AGENDA

1. Kualo Proposal Development (PD) Go Live Update
2. Kualo PD Demo
3. Kualo PD Roundtable

1. Kualo PD Go Live Update - Schedule

Kualo Proposal Development (PD) Go-Live Schedule for all UMB Units

- Group 1 – Implemented on November 28, 2022
 - CSM, MCNHS, SGISD & ICI
- Group 2 – Implemented on January 23, 2023
 - CLA, SFE, SEAS
- Group 3 – February/March 2023
 - CEHD, MGS, CM, CBU, UA, Libraries, Honors College, Research/Graduate Studies, Academic Affairs
- Group 4 – March/April 2023
 - A&F, Enrollment Management, Marketing & Communication

1. Kualo PD Go Live Update - Training

Kualo Proposal Development (PD) Training

- Proposal Aggregators – Train the Trainer Trainings
 - Proposal creation and submission
 - Managing proposals
 - Training sessions are 2 hours and will be held for each Go Live Group
- Approver Training
 - Reviewing proposals for approval
 - Recalling or Returning a proposal
 - Processing proposal approvals
 - Training sessions are 1 hour and will be held for each Go Live Group
- Drop-in Sessions
 - At least monthly, these are posted in the Kualo section of the ORSP website
 - Next Drop-in Session is March 1st from 4 – 5 PM
- All Training Sessions are Posted to the ORSP Website under the [Kualo Page](#)
 - Sign up for Aggregator and Approver Trainings
 - Click the Zoom link to attend the Drop-in Sessions

1. Kualo PD Go Live Update - Training Resources

Kualo Proposal Development (PD) Training Resources

- Step by Step Guides
 - In depth guides for both Aggregators and Approvers
 - Provides detailed information necessary for performing these tasks
 - Available in the [Kualo](#) section of the ORSP Website
- Approver Video
 - 7-minute video highlighting the steps necessary for reviewing and approving proposals
 - Quick refresher for how to approve
 - Not intended to replace the approver training and should be used in conjunction with the guide
 - Available in the [Kualo](#) section of the ORSP Website
- Contact
 - Ginny Maki at Virginia.Maki@umb.edu or ORSPTraining@umb.edu

Training sessions are being held throughout Go Live and additional trainings can be scheduled at any time

2. KualI PD Demo

KualI Proposal Development (PD) Hands-on Demonstration

The screenshot shows the UMass Boston website for the Office of Research & Sponsored Programs. The header includes the UMass Boston logo, a search bar, and navigation links for MyUMass, UMass Boston Resources, and a general navigation menu. The main content area is titled 'Office of Research & Sponsored Programs' and features a left-hand navigation menu with categories like 'About Us', 'Find Funding', 'PI Toolkit', 'KUALI', 'Effort Reporting', 'GRANT Forum', 'Research Committees', 'Research Core Facilities', 'Research Compliance', 'Research Policies', 'Training & Education', 'FAQs', 'Glossary', 'Contact Us', and 'Internal Funding Programs'. The 'KUALI' section is highlighted in the menu. The main content area displays the 'KUALI' heading, a breadcrumb trail, and three buttons: 'KualI (Log In Here)', 'About KualI', and 'KualI Research Resources'. Below these are links for 'Instructions for submitting COI Disclosures', 'Instructions for submitting an IACUC Protocol', and 'Instructions for submitting to the IRB'. A 'CITI Training' section provides information about single sign-on (SSO) for CITI training and includes a link to log in. A 'KualI Proposal Development Training Resources' section lists links to a quick reference video, an approver guide, and an aggregator guide. Finally, a link for 'KualI Proposal Development Drop-in Sessions' is provided.

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3. KualI PD Roundtable

KualI Proposal Development (PD) Roundtable Discussion

- Roundtable Introductions
 - Ginny Maki - Moderator, Assistant Director of ORSP eRA Systems and Training
 - Shala Bonyun, Associate Director of ORSP Preaward Support Services
 - Kyle Levesque, Director, Grants & Sponsored Programs, College of Science and Mathematics
 - David Harrison, Grant and Contracts Administrator for ORSP
- Roundtable Topics
 - Implementation
 - Go Live
 - Using KualI Proposal Development
- Grant Forum Attendee Questions and Answers

Training Opportunities

SRA: Basics of Research Administration

REGISTER NOW THROUGH JANUARY 17 – January 24 – February 28, 2023

Tuesdays, 1:00 – 2:30 pm ET

Live Learning via Zoom

SRA: Financial Management Online

February 13-17

COGR: Virtual Meetings

February 28 – March 3

NCURA: Financial Research Administration

March 6 & 7, 2023: Las Vegas, NV

NCURA: Pre-Award Administration

March 9 & 10, 2023: Las Vegas, NV

Next Grant Forum

March 15, 2023

Website Updates

Communications

Proposal & Award Activity

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Any
Question



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ORSP Leadership

[Matthew Meyer](#)

Associate Vice Provost for Research
and Director of ORSP

[Rebecca Hanson](#)

Assistant Director of ORSP
Postaward Support Services

[Virginia Maki](#)

Assistant Director of ORSP eRA
Systems and Training

[Shala Bonyun](#)

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[Tracey Poston, PhD](#)

Assistant Director of ORSP Research
Compliance and Integrity

[Serena Wang](#)

Research Core Facilities &
Operations Manager of ORSP

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