



# Kuali Build Forms Guide

This document guides users through how to access and manage Kuali Build Forms.

## Kuali Build Forms and Topics

Topics listed below are linked to a correlating section within this document:

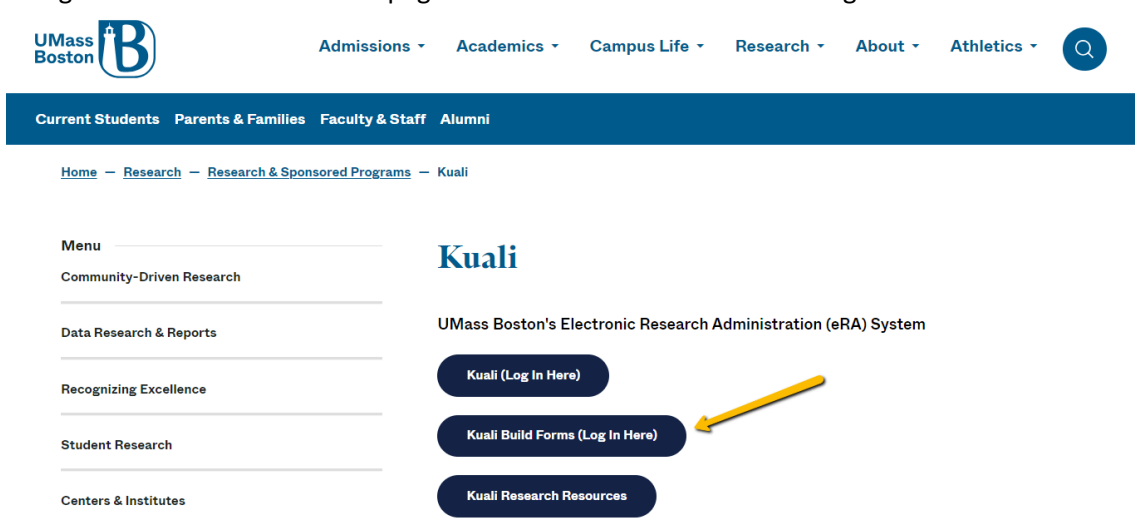
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## Login to Kuali Build

Navigate to the ORSP Kuali Webpage and click the Kuali Build Forms login button.



Kuali Build will default to your Home page.

Green apps launch from links

Teal apps launch from Kuali Proposal Development – Preproposal Forms

## Action List

To access your Action List, click on Action List in the upper center of the landing page of Kuali Build. This brings you to a list of any pending actions you have in the system, you can review and complete all Build actions from this page.

## Document List

To access the document list, click on the app. You will default to view the documents you have access to that were created in that app. In the document list you can view each submission and status. Click on a document line to see the form details.

← Indirect Cost Waiver Form for PD

Number ↓	Kuali PD Number	Submitted At	Submitter	PI Name	Lead Unit Name	Indirect Cost (F&A) Waiver Type	Select your ORSP Preaward GCA Contact	Workflow Status
0067	564	January 12, 2024	O'Keefe, Robert A	Michael J Ward	MGS-Collins Ctr for Public Mgt	Pre-approved in UMB's F&A Rate Policy	Mary F. Harris	COMPLETE
0065	389	January 12, 2024	O'Keefe, Robert A	Michael J Ward	MGS-Collins Ctr for Public Mgt	Pre-approved in UMB's F&A Rate Policy	Mary F. Harris	COMPLETE
0059	550	January 8, 2024	Abend, Alan G	Kristin E Uterwyk	Urban Harbors Institute	Pre-approved in UMB's F&A Rate Policy	Mary F. Harris	COMPLETE
0056	538	December 22, 2023	Harris, Mary F	Kristin E Uterwyk	Urban Harbors Institute	Pre-approved in UMB's F&A Rate Policy	Mary F. Harris	COMPLETE
0055	487	December 22, 2023	Abend, Alan G	Kristin E Uterwyk	Urban Harbors Institute	Pre-approved in UMB's F&A Rate Policy	Mary F. Harris	COMPLETE

## Download a Form PDF

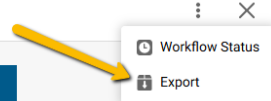
To print a PDF of the form, click into the three dots in the upper right corner.

0343 Completed Nov 27, 2024 · 11:09 AM COMPLETE



Then click the Export option. A PDF will be downloaded to your web browser.

0343 Completed Nov 27, 2024 · 11:09 AM COMPLETE



## View Status

To view the workflow status, under the same three dots menu noted above, click on the Workflow Status. A sidebar will open to the right where you will see the workflow steps.

0343 Completed Nov 27, 2024 · 11:09 AM COMPLETE






Toggle the arrow open or closed to view workflow step details. Those with permission to do so may resend Workflow notifications and skip or reassign the current approval stop.

0343 Completed Nov 27, 2024 · 11:09 AM COMPLETE





### Indirect Cost (F&A) Waiver Request and Approval

**Purpose of this Form**  
To identify the correct Indirect Cost rate to use for proposals submitted to external sponsors. This form will assist you in determining the appropriate Indirect rate to use when preparing your budgets for your proposal and will facilitate the approval process should your request require additional review and approval.

**Approved and uploaded Indirect Waiver Requests are required at the time a proposal is submitted into workflow approval routing.**  
Initiate forms at least **10 business days** ahead of when you submit your proposal for approval. Best practice is to initiate this form as soon as possible as it is needed ahead of budget development, the rate must be defined before you can complete the budget.

**Indirect Costs**  
Also known as 'overhead' and 'facilities and administration (F&A) costs' are those costs that UMass Boston incurs for

#### Workflow Status

Nov 27, 2024 - 11:09am EST  
Workflow Complete

Nov 27, 2024 - 11:09am EST  
Email Sent  
(Confirmation to Submitter)


Nov 27, 2024 - 11:09am EST  
Submitted for Approval

Submitted - Nov 27, 2024 - 11:09am EST  
Burke, Michelle

## Send Back or Deny

Where the Approve button is in the upper right-hand corner, there are three dots, under those is a send back and a Deny option.

0344 Submitted Nov 27, 2024 · 11:52 AM IN PROGRESS

Save Approve 

- Workflow Status
- Send Back
- Deny