

## **Scripps Institution of Oceanography Service Agreements in Kual Research Proposal Development**

New service agreements and amendments with additional time and/or money will need to be submitted to SIO C&G through Kual Research Proposal Development. If C&G receives a request for a service agreement directly from a customer, the request will be forwarded to the technical lead and business office contact to begin the process in KR.

### Submitting a service agreement to C&G, and reference numbers

The department will use KR to trigger C&G involvement in a service agreement request. C&G will approve the PD record in KR to “accept” it into C&G workflow. Approval of the PD record is not necessarily permission to start work. Please read the notification you receive via KR to confirm.

For projects that are awarded, we will use the KR Award number for tracking/reporting. In the time before the record is moved to Award, or for the small number of projects that are proposed but not awarded, we will use the IP number for tracking/reporting.

### Some details in KR

- Please choose “Other Sponsored Activity” for the Activity Type.
- If there is a customer deadline, please use the stated deadline for Sponsor Deadline and choose Hard Deadline for the Sponsor Deadline Type. If there is no customer deadline, the Sponsor Deadline should be the day that you are submitting the request, and please choose Internal for the Sponsor Deadline Type.
- The Anticipated Agreement Type is Service Agreement.
- In order to help C&G triage proposals, please put “Service:” at the beginning of the Project Title. This will help us more easily identify them in KR.
- If the customer has assigned a PO or reference number by the time you are routing in KR, please include that as a parenthetical at the end of the project title.
- Sponsor codes. Please check in KR to see if the customer already has a sponsor code. If not, please email C&G with the company name, address, and website so that C&G can request a code. Once C&G provides the code, it will take ~a day for it to be available in KR. Please try to avoid routing with the 9850 code if timing at all allows.
- Please make sure to include a prime sponsor code if appropriate.
- Please add the name of the technical lead for the service activity as the Principal Investigator. The technical lead does not need Principal Investigator status; a Principal Investigator exception is not required for a service agreement.
- Customer contact. Please put the name and address of the customer contact as well as any special delivery instructions in the 'delivery information' tab, not just in the service agreement customer contact questionnaire section.
- Service agreements are subject to US Export Control regulations. For all service agreements, please conduct a Visual Compliance Restricted Party Screening on all SIO project participants as well as on the customer entity, and attach a single PDF of the results under the Internal tab in the Attachments section.
- Please attach any additional documents (such as RFQs or email communications about the work, or required vendor paperwork) under the Internal tab in the Attachments section.
- Please only complete a summary budget (click “add budget” and enter the total amount in Direct Costs and in Total Costs, leaving F&A blank). SIO C&G does not require detailed budgets in Kual Research Proposal Development for service agreements. Should a specific RFQ require a detailed

budget, please feel free to create that in Kualu Research or to simply upload a PDF or excel version under the Internal tab in the Attachments section.

- You do not need to fill out the word document PO for Services Checklist. The questions in KR replace that document.

*Please visit <https://blink.ucsd.edu/research/preparing-proposals/kuali-research/index.html> for more information on the transition to Kualu Research including instructions to request access*