



Kuali Build Forms Guide

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

Kuali has developed resources to assist their customers with navigating and using Build Forms, anyone can access those generic resource instructions, see [Kuali Build Basics](#).

Contents

Login to Kuali Build.....	1
Action List.....	3
My Documents.....	3
Document List (Permission Based)	3
Download a Form PDF	4
View Status	5
Approving.....	5
Send Back or Deny	6
Send Back in Workflow: Choose Specific Step	6
Notifications.....	7
Approval Notification	8
Form is out of date.....	9
Form Dashboard	10

Login to Kuali Build

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



Office of Research and Sponsored Programs
University Massachusetts Boston
100 Morrissey Boulevard, Boston, MA 02125-3393
P 617.287.5370 | www.umb.edu/ORSP



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Kuali

[Home](#) [Research](#) [Research & Sponsored Programs](#) [Kuali](#)

Menu

[Community-Driven Research](#)

[Data Research & Reports](#)

[Recognizing Excellence](#)

[Student Research](#)

[Centers & Institutes](#)

[Grand Scholarly Challenges](#)

[R1 Research Classification](#)

Kuali Research

UMass Boston's Electronic Research Administration (eRA) System

[Kuali Login](#)

[Kuali Build Login](#)

Kuali Systems Training & Resources

CITI Training information can be found on the [Training](#) page.

Kuali Build will default to your Home page.

Build

[Home](#) [Action List](#) [My Documents](#) [Search](#) [What's New?](#) [HM](#)

All apps

Favorites

My apps

Shared with me

Home

New Sponsor Request

New Organization Request

NSF SIWE Form for PD

Student Payment Budgeting Form for PD

(ARCF) - FACILITY ISSUE REPORT FORM

Indirect Cost Waiver Form for PD

Indirect Cost Waiver Form (Link)

IACUC New Researcher Training

IACUC Protocol Writers Workshop

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.



My Documents

To access a listing of all documents you have submitted or saved, click on the My Documents link in the upper center of the landing page of Kuali Build.



You may toggle between the Submitted and Draft options to view your documents. Click on the document line to view your submitted documents and to edit your draft documents.

My Documents ×

Submitted Drafts (5)				
Document Type	Title	Created	Time Elapsed	Actions
Investigator Application	0052	Sep 3, 2025, 5:00 PM	13 days	
Indirect Cost Waiver Form (Link)	0111	Sep 3, 2025, 4:59 PM	13 days	
Award Modification Request	0012	Sep 3, 2025, 3:49 PM	13 days	
Indirect Cost Waiver Form (Link)	0092	Jul 31, 2025, 2:13 PM	about 2 months	
WISER Tuition & Fees Contract Form	0007	May 7, 2025, 1:09 PM	4 months	
Rows per page: 10 1-5 of 5 < >				

Document List (Permission Based)

This access is permission based, if you do not see the documents list upon opening a form app, you do not have the permissions necessary to view the document list for that form.

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

Q Search

GO

↑↓ Sort (1)

👁 Columns

📄 Views

📄 Export

🔗 Share

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 Uiterwyk	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 Uiterwyk	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 Uiterwyk	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 of a document you have opened.

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

UMass Boston

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 common or joint objectives that cannot be identified easily with a particular project. Such costs are for UMass Boston facilities and administrative services as a whole. The following are some examples of the pooled costs used by the University

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

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

UMass Boston

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Workflow Status

Export



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University Massachusetts Boston
100 Morrissey Boulevard, Boston, MA 02125-3393
P 617.287.5370 | www.umb.edu/ORSP

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

UMass Boston

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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

UMass Boston

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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

Approving

Kuali Build sends an approval email notification anytime an approval action is required from a user. The approval email includes customized instructions for the specific form as well as links directly to the form to take the approval action. The email also includes a link to the Action List, see the [Action List](#) section for more information.

To approve, review the form and any attestations included in the communication. By clicking the Approve button, you are agreeing to any attestations as well as the details directly included on the form.

The Approve button is in the upper right corner of the form, click to approve.

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. You will have the option to include a comment which will display in the workflow status history for that form.

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

Save
Approve

⋮

✕



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Approved and uploaded Indirect Waiver Requests are required at the time a proposal is submitted into workflow approval routing.

Workflow Status
 ↩ Send Back
 ⛔ Deny

Send Back in Workflow: Choose Specific Step

Kuali now gives you the flexibility to choose exactly which stage in the workflow you'd like to send a form back to, not just the previous one.

How It Works:

1. Click Send Back at the bottom of your workflow step.
2. A Send Back Options window will appear.
3. You'll see a list of previous stages you can return the form to — for example (refer the screenshot below):
 - Form Submission
 - DRA Validation Task
 - Compliance Validation Task
4. Select the appropriate step.
5. Add a required comment explaining the reason for sending back.
6. Click Send Back to confirm.

Note: The selected step's assignee will receive the form again for review or corrections.

Workflow Admin Tip: Disable Send Back If Needed

You can disable the Send Back option globally (in Workflow Settings) or override it at specific steps. This helps enforce process control where needed.

SS Test **DRAFT**

Dashboard Documents Form Workflow Publish

Design ☒ Test

Current User: **Boxell, Sara (Sara.Boxell)**

institutional policy governing the conduct of sponsored programs.

- Eligible with Approval
- Eligible with Approval investigators are considered when there is a funding opportunity the applicant wishes to submit for, but the position held by the applicant is not typically involved with sponsored programs. In these instances, approval is granted on a case by case basis and for each specific proposal the applicant would like to submit. This form may be completed multiple times by the same applicant, one for every proposal they are interested in submitting.

Resources

- Office of Research & Sponsored Programs
- ORSP Research Committee
- Roles and Responsibilities
- ADD LINKS TO POLICIES

Applicant Information

You are completing an application as an Investigator for UMass Boston

Application Number

Send Back Options

Send back to

☒ Form Submission

☐ DRA Validation Task

☐ Compliance Validation Task

Add Comments *

Send Back

Back **Send Back** **Mark Complete**

NOTIFICATION OF SUBMISSION TO GCA

Satav, Shreeya (shreeya.satav)

Confirmation: [Number]

DRA VALIDATION TASK

Maki, Virginia L (virginia.maki)

COMPLIANCE VALIDATION TASK

Poston, Tracey L (tracey.poston)

Notifications

Kuali Build sends notifications automatically as part of the built-in workflow routing. Notifications are customizable and will differ in appearance and content depending on the form and notification configuration.

Below is an example of an email from the Kuali Build system:



Office of Research and Sponsored Programs

University Massachusetts Boston
100 Morrissey Boulevard, Boston, MA 02125-3393
P 617.287.5370 | www.umb.edu/ORSP

From: no-reply@mail.kualibuild.com

To: virginia.maki@umb.edu

Subject: Confirmation: Indirect Cost Waiver Form Submitted for Proposal 469



Thank you for submitting a Indirect Cost Waiver Form for your proposal.

The information on this form indicates this proposal is using a UMass Boston Preapproved indirect cost rate. No further review or approval is needed and a PDF of the form is attached for your records. If this is inaccurate, please reach out to your Preaward GCA contact.

Indirect Cost Waiver Form Number 0000

This email was automatically generated.

Approval Notification

Below is an example of an approval email notification from Kuali Build. Note the Begin Review button at the bottom of the message, click this to navigate directly to the approval task.



Office of Research and Sponsored Programs
University Massachusetts Boston
100 Morrissey Boulevard, Boston, MA 02125-3393
P 617.287.5370 | www.umb.edu/ORSP

From: no-reply@mail.kualibuild.com

To: shala.bonyun@umb.edu

Subject: Approval: Indirect Cost Waiver Form for Proposal 0000 PI Satav, Shreeya



Hello Shala,

This is an Indirect Cost Waiver Form for a Sponsor Mandated or Unrestricted Proposal **Waiver** Type. Please review the Sponsor Mandated Rate and verify the documentation uploaded supports that rate, **or verify the proposal qualifies as unrestricted.**

Approve the form if the requested rate is accurate for the proposal.

Indirect Cost Waiver Form Number 0000

Form Name:INDIRECT COST WAIVER FORM FOR PD

Step Name:GCA APPROVAL

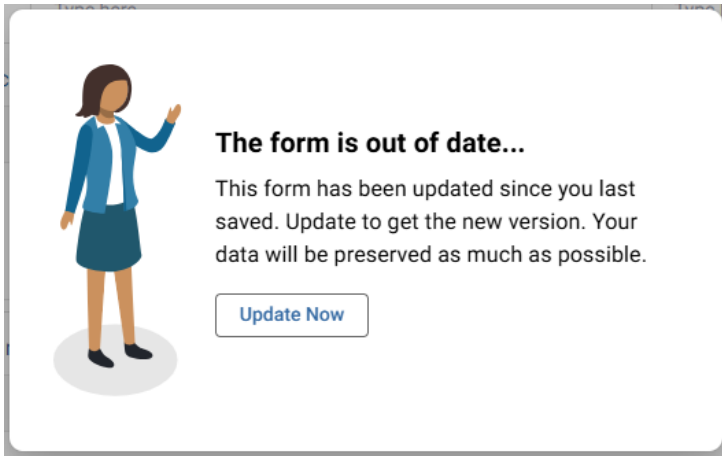
Your Action: **APPROVAL**

Begin Review

This email was automatically generated.

Form is out of date

If a Build form has been updated by ORSP and you have a form that you have saved that has not been submitted into workflow approval routing, you may see the following message populate the next time you open that form.



Accept the changes to the form by clicking the Update Now button, your form will then open with the updates in place. Most often these changes will not be substantial, but you may need to re-enter some information.

Form Dashboard

Kuali Build Form Administrators have access to the form Dashboard that provides statistics for submissions.

