Office of Research and Sponsored Programs

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Assigning Credit Splits in Kuali   December 2021

Purpose: To provide guidance for using credit split distribution in Kuali. Credit Splits should be discussed by all investigators at the proposal stage and agreed upon jointly.
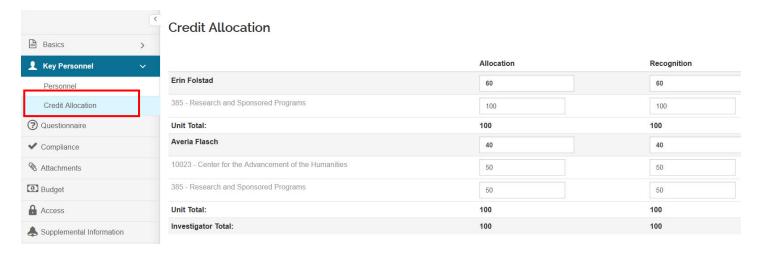
Investigator credit for their contributions towards proposed research and projects will be captured in Kuali in two different ways:

- **Allocation**. This <u>indicates work done</u> by the investigators and their respective units, split by percentage to each, which could include centers or institutes in addition to a home unit. These amounts are used to distribute annual research incentive funds for those proposals that carry the university's full federally negotiated on or off campus rate. Anything less than these amounts does not qualify for incentive funding (and therefore allocation credit does not apply).
- **Recognition**. This <u>indicates academic or intellectual credit</u> for the proposed project. These amounts can be used in promotion and tenure decisions, merit increase decisions, etc.

Both Allocation and Recognition totals need to be entered for all Principal Investigators (PI) and Co-Investigators (Co-I) at the time of application. By default, other Key Personnel are not included, but may be added. Those that help with grant development or other aspects of the project but are not included in the proposal as key personnel, are not considered here. The PI is responsible for entering the information into Kuali at the time of application. All PIs and Co-Is will be required to certify that the information in the application is true and correct. Proposals will not be able to move into the routing process until all PIs and Co-Is have completed their certification. The distributions entered at the time of application will carry through to any awards made and should be averaged across years for multiyear projects.

HOW TO ENTER CREDIT SPLIT INFORMATION IN KUALI

After entering all Marquette Key Personnel in an application/proposal development in Kuali, click on the subtab, CREDIT ALLOCATION.
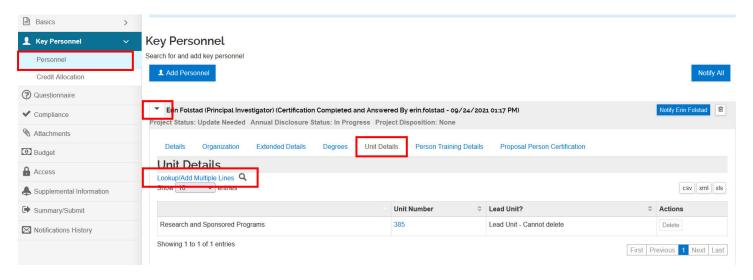

In the above example, there are two investigators. Erin is the PI and Averia is a Co-I, credit needs to be added for both allocation and recognition for each. Erin is being assigned 60% of the allocation and recognition and Averia is being assigned 40% for each. Erin has only one unit associated with her contribution to the project, while Averia's contribution is being split between her home unit and a center. This split between two units can help to allocate incentive funds to a center and demonstrate center related activity.

The editable rows with the investigator's names are associated with the distribution for this project. The investigator rows added together must equal 100 in the Investigator Total at the bottom (in the example above, it is 60 + 40).
The editable unit rows (light grey) are associated with how the investigator's project distribution is spread across their unit/units. The Unit Total for each person must equal 100 (in the example above it is 50 + 50). The Unit Total line is per person; the Investigator Total represents the overall proposal.

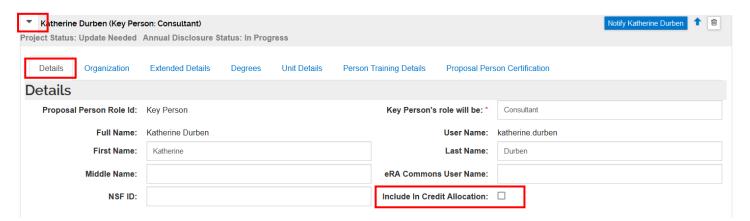**To add additional units for an individual:**
Each person is automatically associated with their home unit. To add another unit, go to the PERSONNEL tab, click the ARROW next to the investigator's name so the sub-menu appears below, click UNIT DETAILS and then LOOKUP/ADD MULTIPLE LINES to search for another unit.

If each investigator has only one unit, 100 should be entered in editable unit field under each investigator's name. If an investigator has more than one unit, the distribution should be spread across the units with the Unit Total for that investigator totaling 100.

To include credit allocation for Key Personnel:
To add a Key Personnel to the Credit Allocation table, go to the PERSONNEL tab, click the ARROW next to the investigator's name so the sub-menu appears below, click the INCLUDE IN CREDIT ALLOCATION box under the DETAILS tab.

To change a distribution after an application has been submitted or an award has been made, all investigators must agree upon any changes and they must be approved by all Chairs/Deans/Other Approvers. Once approved via email, these changes must be communicated via e-mail to Kualihelp@marquette.edu, with all investigators and approvers cc'd

in. ORSP will then update the Kuali record accordingly. Unless there are extenuating circumstances, it is expected that any changes will occur no more often than annually.