Overview:

PI, co-I(s), and other key persons are required to answer three certification questions for each proposal. The questions can be answered while the proposal is still being developed (‘in progress’), or after the proposal has been submitted to routing and has reached the ‘Investigators’ route log level.

Procedure:

Investigators (PI, co-I(s), other key persons) who are CSU employees are all required to approve and certify the proposal.

The proposal record can be opened for the approval/certification actions in multiple ways: via a link provided by a department administrator, using the proposal number in Search for Proposals, via a link in the auto-generated Action List item notification email, or using the Open Proposal link in the Action List item.

Certification during routing:

When a proposal is opened by someone who needs to approve, the system will display the Summary/Submit section:

![Proposal Summary](image)

Click to go to any section for more detail

NOTE: Approval happens with a button in the Summary/Submit section. Certification questions are answered in the Key Personnel section.
If certification has not been completed prior to routing, when the investigator clicks the **Approve** button, a data validation message will pop up:

1. Click the **Fix It** link. The system will redirect the investigator to the Key Personnel section.

2. Click on the arrow by the correct investigator name to open the details section for the named person:

3. Click on the **Proposal Person Certification** link to display the questions.

4. Answer all questions.

5. Click **Save** at the bottom of the page:
6. Use the left navigation menu to return to the Summary/Submit section:

![Key Personnel](image)

7. Click the Approve button again. Then click the Close button:

![Proposal Person Certification](image)

**System note:** Attachments with spaces or other special characters generate a yellow warning banner. This does **not** affect certification or approval. Answers to certification questions will be saved even when this banner displays.

**NOTE:** When a PI tries to submit his/her own proposal to routing, data validation will show an error message, indicating that certification questions must be answered **before** the proposal can routed.

**Certification before routing**

The PI, co-I(s), and Key Persons can answer questions prior to the proposal being routed by opening the proposal and navigating to the Key Personnel section.

1. Open the proposal.

The proposal can be opened by using a Proposal Number link in the PI certification notification email, the proposal short URL link sent by a department administrator, or using the proposal number in Search for Proposals window.

**NOTE:** If proposal search is used, the proposal should be opened in **VIEW** mode (using the view link in the Actions column in search results, far left). This allows the questions to be answered without locking the proposal record for another user.
2. Use the left navigation menu to get to Key Personnel section. Click on Key Personnel, then Personnel sub-menu item:

3. Click on the arrow by the correct investigator name to open the details for that person.

4. Click on the Proposal Person Certification section link.

5. Answer all questions.

6. Click Save button at the bottom of the web page.

   This will change the display to show the certification has been completed.

7. Then click Close button.

**NOTE**: DO NOT simply close the browser window ... **always** use the CLOSE button.