

CoeusLite

Proposal Development

User Guide



Coeus 4.5.1[®]

**Web-based application for
preparing, routing, and submitting proposals**

**For additional help, contact the
UC Coeus Help Desk at coeus@uc.edu**

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Introduction

CoeusLite Proposal Development allows users to prepare and view proposal funding applications and then route the completed applications for internal approval. UC Administrators can view proposal funding applications. UC Approvers can view, approve, or reject proposals for correction. Proposals prepared in CoeusLite are fully compatible with Coeus Premium for submission to Grants.gov by Sponsored Research Services (SRS) Grant Administrators (GAs).

The CoeusLite application allows users to search and view proposals where the user is an aggregator, an approver, or holds a specific authorization to view a proposal.

Accessing CoeusLite Proposal Development:

CoeusLite can be accessed at <https://coeus.uc.edu/coeus/CoeusWebStart.jsp>. Contact Sponsored Research Services (SRS) at coeus@uc.edu to gain Coeus access permissions.

The screenshot shows the CoeusLite web application interface. At the top, the user is identified as "User: Carole H Donnellon" and "Current Locks". The navigation menu includes "Coeus Home", "My Proposals" (circled in red), "Inbox", and "Logout". A yellow callout box points to the "My Proposals" link with the text: "Click on My Proposals to access Proposal Development".

The main content area displays a "Welcome to CoeusLite" message. Below this, the "Primary Features of Coeus Lite include:" section lists the following features:

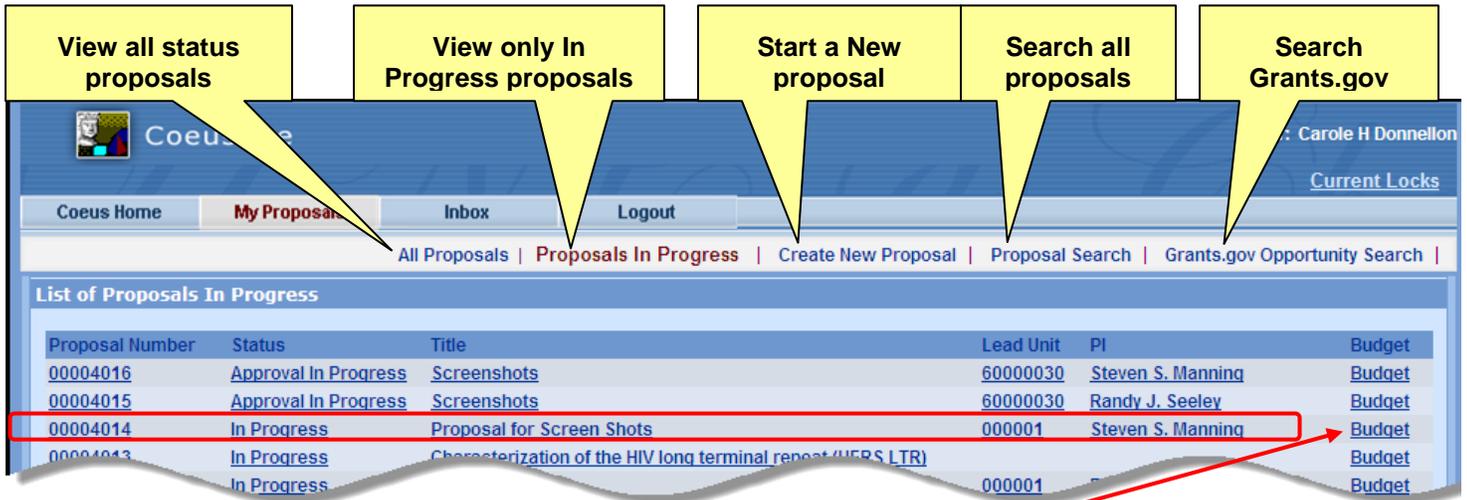
- My Protocols** - Allows Principal Investigators to prepare and submit protocol applications and review detailed information associated with their existing protocols.
- My Proposals** - Allows Users to view and prepare grant applications and route their applications for Institutional Approval. Institution Administrators can see and approve grant applications. Institute Approvers can view, approve, or reject proposals for correction. OSP Authorized Administrators can submit applications to Grants.gov.
- COI Disclosure** - Allows individuals to provide data and required updates on entities in which they hold interest.
- Inbox** - List of Resolved and Unresolved messages from Coeus application with active links to Coeus Lite proposals listed by title and number.

On the left side, there are links for "Coeus Lite" and "Grants. Gov". On the right side, there is a "Coeus Mission" section with the text: "To create, maintain and support the most robust electronic solution to manage all components of sponsored projects from proposal development through award closeout while fostering best practices by joining innovative technology with the knowledge base of a national consortium of research stakeholders."

Overview of Screen Navigation:

The default view upon entry to **My Proposals** is **Proposals in Progress**.

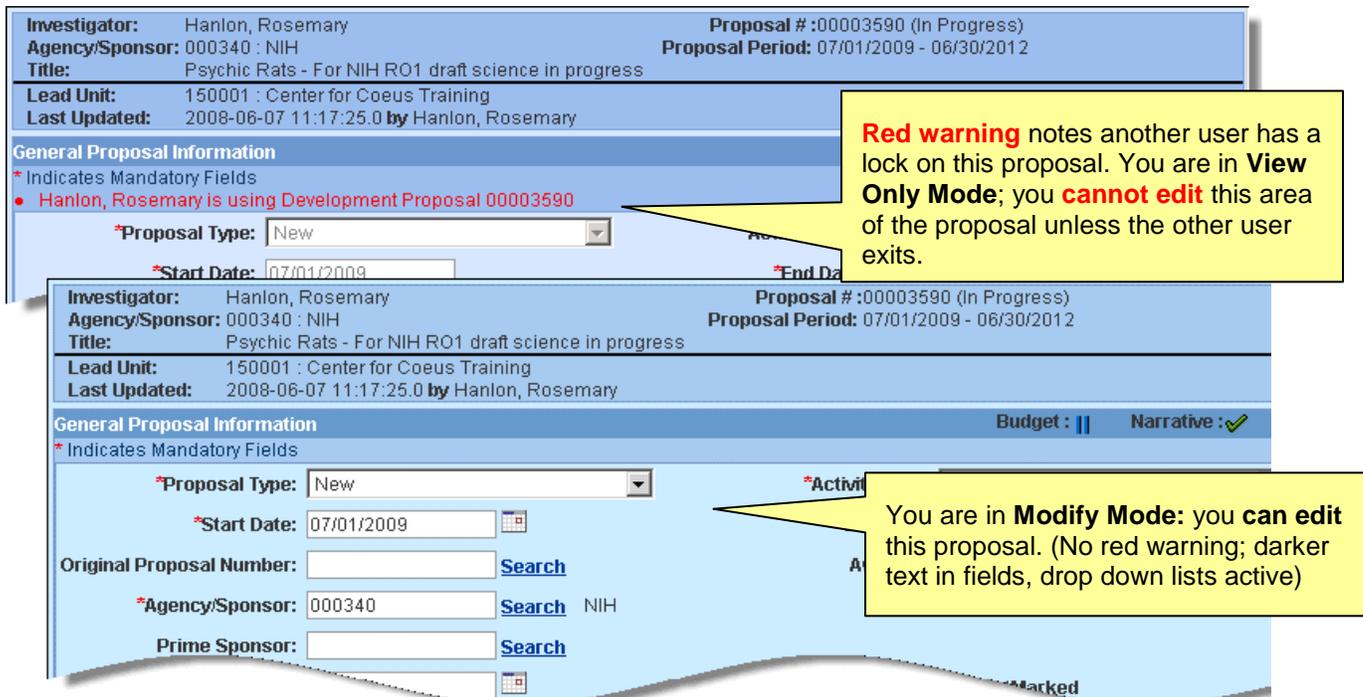
- Select **Proposals In Progress** displays any non-approved proposal that you hold a view or modify role.
- Select **All Proposals** to see the list of all Coeus Proposals (in progress, approval in progress, submitted, etc).
- Select **Create New Proposal** to start a new Coeus Proposal.
- Select **Proposal Search** to locate a specific proposal.
- Select **Grants.gov Opportunity Search** to connect to Grants.gov and locate a funding opportunity
- Select anywhere on a proposal in the **List of Proposals** displayed in the lower pane to open the proposal



Select anywhere on the Proposal Line to **open it**. Select **Budget** to navigate directly to the **Budget** screens.

Identifying View Modes: Modify versus View Only

Open General Proposal Information: **View only mode vs. Modify mode.**



Multiple Users in Modify Mode: CoeusLite allows multiple users to access the proposal in modify mode: one user access to modify the General Info and Upload Narratives screens while another user simultaneously modifies the Budget. Coeus Premium can support three users editing/modifying a proposal simultaneously (Details, Narratives, or Budget).



If another user is modifying the general info or upload narrative screen and you want to modify the budget, you **must navigate to the budget directly**. See page 5 for instructions.

Open Budget Views: Modify mode vs. View-Only mode:

Modify Mode: Budget open in **Modify Mode**: note dark text in fields, drop-down lists active, and no red warning note.

View-Only Mode: Budget open in **View-Only Mode**: note **Red** warning, grayed-out text in fields, and drop-down lists not active.

View-Only Mode Warning: Hanlon, Rosemary is using Budget 00003590

Locating Proposals in CoeusLite

All Proposals

List of All Proposals window: will display status Submitted, Approved, Approval in Progress, In Progress, Rejected, Post-Submission Approval, Post-Submission Rejection.

CoeusLite User: Carole H Donnellon

[Current Locks](#)

Coeus Home **My Proposals** [Inbox](#) [Logout](#)

[All Proposals](#) | [Proposals In Progress](#) | [Create New Proposal](#) | [Proposal Search](#) | [Grants.gov Opportunity Search](#) |

List of All Proposals

Proposal Number	Status	Title	Lead Unit	PI	Budget
00004016	Approval In Progress	Screenshots	60000030	Steven S. Manning	Budget
00004015	Approval In Progress	Screenshots	60000030	Randy J. Seeley	Budget
00004014	In Progress	Proposal for Screen Shots	000001	Steven S. Manning	Budget
00004013	In Progress	Characterization of the HIV long terminal repeat (HERS LTR)			Budget
	In Progress		000001		Budget

Proposals In Progress

List of Proposals In Progress window: displays In Progress, Approval in Progress, and Rejected status.

Proposal Number	Status	Title	Lead Unit	PI	Budget
00004016	Approval In Progress	Screenshots	60000030	Steven S. Manning	Budget
00004015	Approval In Progress	Screenshots	60000030	Randy J. Seeley	Budget
00004014	In Progress	Proposal for Screen Shots	000001	Steven S. Manning	Budget
00004013	In Progress	Characterization of the HIV long terminal repeat (HFRS LTR)	000001		Budget

Proposal Search

Proposal Search window: enter search criteria value(s) then select **Search**.

Please enter search criteria of the form ^value* or ^value or value* in any of search fields.

Proposal Number: Proposal Type:

Status: Deadline Date:

Investigator: Unit Number:

Unit Name: Title: *Psychic*

Sponsor Code: Sponsor Name:

Account:



Use the wildcard symbol * in Coeus search screens. Strategic use of wildcards can reduce the number of letters you have to type – reducing typos! Also, you only have to remember key words, not entire titles or names. Entering partial information in several search fields, with or without wildcards will also help to refine your search to the most relevant selections. The Premium user guide has additional information on search options.

Result: Select proposal, search again, or close the search window.

Development Proposal Search Result

Search Again Close Window

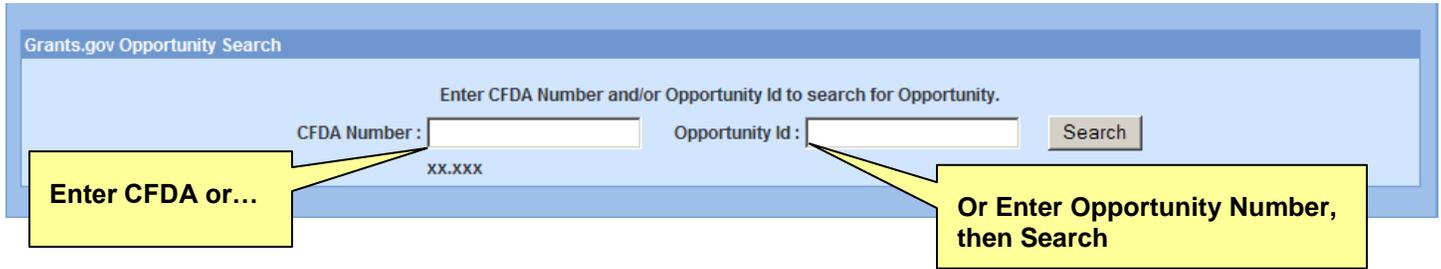
PROPOSAL_NUMBER	TYPE	CREATION_STATUS_CODE	TITLE ^	UNIT_NUMBER	UNIT_NAME	PERSON_NAME	DEADLINE_DATE	SPONSOR_CODE
00002097	New	In Progress	RO1 fpr february -- psychic rats	000001	Massachusetts Institute of Technology	Hanlon, Rosemary	2007/02/05	000340
00003590	New	In Progress	Psychic Rats - For NIH RO1 draft science in progress	150001	Center for Coeus Training	Hanlon, Rosemary		000340

Search Again Close Window

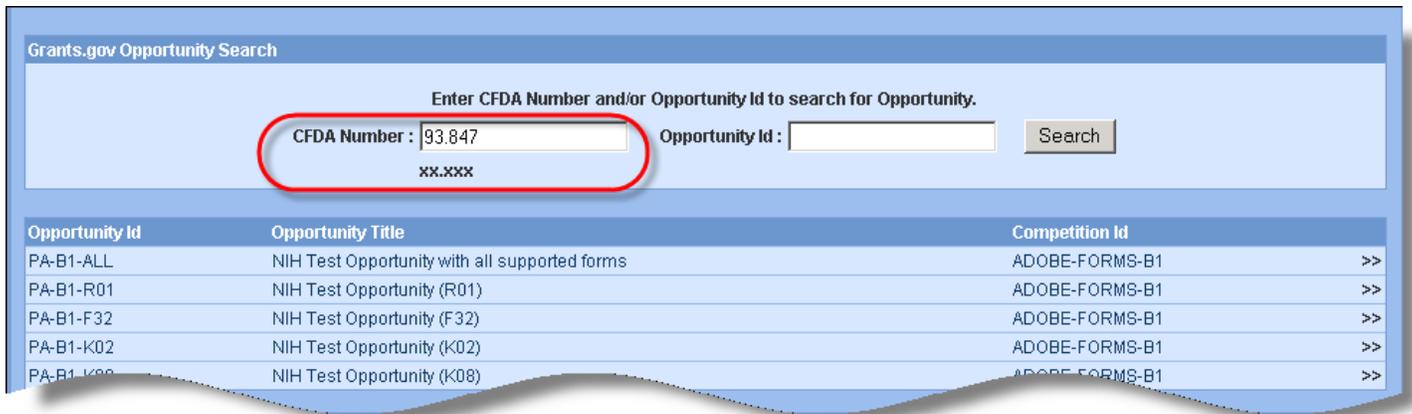
Preview a Grants.gov Opportunity

Grants.gov Opportunity Search

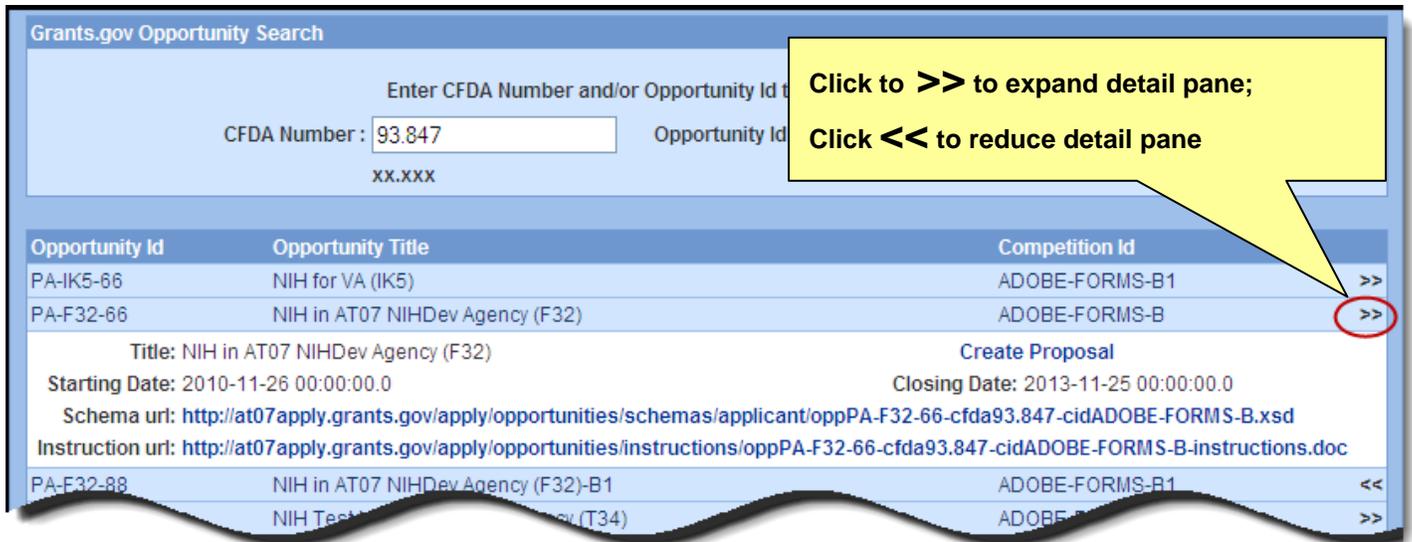
Grants.gov Opportunity Search window: enter the CFDA number or Sponsor Opportunity ID number to perform the search and review the results.



Grants.gov Search results (results below using CFDA 93.847 with the Grants.gov Test Server):



Review Opportunity details:



Create Proposal from the Grants.gov Opportunity Search

Use the **Create Proposal** option from the **Grants.gov Opportunity Search** results to generate a new proposal record that includes this Opportunity link & form set. If you choose to **Create Proposal** from a result, you may be presented with the select a unit screen if you have the Proposal Create role in more than one unit. The Opportunity ID and CFDA number will automatically be populated on the General Info window. You will need to maintain the mandatory fields on the General Info screen to save the proposal and complete the link.

General Proposal Information Budget: ✕ Narrative: ✕

* Indicates Mandatory Fields

*Proposal Type: [Please Select] *Activity Type: [Please Select]

*Start Date: [] *End Date: []

Original Proposal Number: []

*Agency/Sponsor: []

Prime Sponsor: [] Search

Proposal Deadline Date: [] Receipt Postmarked

NSF Science Code: [Please Select]

Anticipated Award Type: [Please Select]

Sponsor Proposal No: []

*Title: []

Proposal in Response: [Please Select] Sub Contract

Funding Opportunity Number: PA-B1-R01 CFDA Number: 93.847

Agency Program Code: [] Agency Div Code: []

Save

Investigator: [] Proposal # : 00000421 (In Progress)

Agency/Sponsor: 000340 : NIH Proposal Period: 06/01/2010 - 05/31/2013

Title: How many licks DOES it take to get to the center of a Tootsie...

Lead Unit: 150001 : Center for Coeus Training

Last Updated: 2009-10-01 15:43:43.0 by Tester07

GRANTS.GOV

General Proposal Information Narrative: ✕

* Indicates Mandatory Fields

*Proposal Type: New

*Start Date: 06/01/2010

Original Proposal Number: []

*Agency/Sponsor: 000340 Search NIH



Some opportunity schemas may not contain a CFDA number; this is very common with NIH opportunities. In these situations, the link to the Grants.gov opportunity is not completed upon saving the proposal. The proposal record will save, but the user must perform the standard “navigate to Grants.gov screen” step to complete the opportunity link to the proposal. As users should *always* navigate to the Grants.gov window during proposal preparation to review and select forms, this is not a blocking issue for this new functionality.

Create a New Proposal:

Create New Proposal

If you are authorized to create proposals in more than one Lead Unit, you will first be presented with your list of those units. Click on the appropriate Unit for this submission. Lead unit cannot be changed once a proposal is started. You will be able to add a unit(s) to support routing and credit split for each investigator on the Investigator Details screen.



NOTE: The Lead Unit is the primary department associated with the proposal. This is the *department that will submit the proposal and manage the award, if funded.*

Please select Unit for a New Proposal	
Unit Number	Unit Name
150001	Center for Coeus Training
151000	Biology
159700	Center for Cancer Research

Click one to select the unit to be Lead for this proposal.

Proposal Development: Initial entry screen



Use the Navigation Panel buttons to navigate your proposal. Don't use your Browser's "back" or "forward" buttons – these functions are not supported for use in navigation in Coeus.

Navigating the CoeusLite Screens:

<p>Proposal Summary</p> <p>✓ General Info >></p> <p>✓ Organization</p> <p>✓ Investigators/Key Persons</p> <p>✓ Credit Split</p> <p>Special Review</p> <p>Abstract</p> <p>Science Code</p> <p>✓ Others</p> <p>YNQ</p> <p>✓ Proposal Roles</p> <p>Questionnaire</p> <p>PHS Fellowship Form- required data</p> <p>NSFCover Page -required for g.gov submissions</p> <p>PHS398 Training Budget V1-0</p> <p>PHS Fellowship Form V1-2</p> <p>Questions for Grants.gov S2S Forms</p> <p>UC Policy Questions</p>	<p>General Info</p> <p>Organization</p> <p>Investigators/Key Persons</p> <p>Credit Split</p> <p>Special Review</p> <p>Abstract</p> <p>Others</p> <p>YNQ</p> <p>Proposal Roles</p> <p>Questionnaire</p> <p>Grants.Gov</p> <p>Budget</p> <p>Upload Attachments</p> <p>Validate</p> <p>Submit for Approval</p> <p>Print</p> <p>Copy Proposal</p> <p>Email</p> <p>Add New Rolodex Entry</p>	<p>Enter specific details required to save and create a proposal. This panel will always be the first screen presented when a proposal is selected.</p> <p>Displays the contact information of the submitting organization, performing organization, and allows users to add performing sites of additional locations.</p> <p>Add Investigators and Key Persons and customize their unit, roles, contact and degree details.</p> <p>Enter credit allocation specifics for Investigators as defined by your department's business practices.</p> <p>Enter information for research requiring special review or approval such as use of animals or human subjects.</p> <p>Enter text in appropriate tab screens to populate specific sponsor forms.</p> <p>Inspires User Name (NASA submissions only)</p> <p>Enter answers to compliance questions required by UC and the sponsor.</p> <p>Add or remove user access to your proposal</p> <p>Enter answers to required UC Policy Questions -others may be required by the sponsor.</p> <p>Links the proposal to a Grants.gov opportunity; displays opportunity details, forms, and submission status</p> <p>Navigates to the budget screens</p> <p>Navigates to the file upload screens</p> <p>Performs the locally defined validation checks and s2s validations if a Grants.gov opportunity has been selected and saved.</p> <p>Starts Complete & Validated proposal routing for internal approval</p> <p>Navigates to the print options screen to print the Grants.gov forms, generic forms, or sponsor paper-submittal forms from your Coeus proposal data</p> <p>Allows authorized users to copy all or part of the proposal to a new proposal</p> <p>Navigates to the email notification function that allows users to generate and send email messages.</p> <p>Create a non-UC investigator, performing site, contact, or key person Rolodex</p>
<p>Grants.Gov</p> <p>Budget</p> <p>Upload Attachments</p> <p>Validate</p> <p>Submit for Approval</p>		
<p>Print</p> <p>Copy Proposal</p> <p>Email</p> <p>Add New Rolodex Entry</p>		

1. Navigate to the General Info screen:

General Info

General Info is the default view upon opening a proposal. Users can select General Info from the left navigation bar to return to this screen. Fields with a red asterisk (*) are required to save and generate a proposal number.

The screenshot shows the 'General Proposal Information' screen. The left navigation bar includes sections like 'Proposal Summary', 'Questionnaire', and 'Grants.Gov'. The main area contains the following fields:

- Proposal Type:** * (dropdown menu)
- Activity Type:** * (dropdown menu)
- Start Date:** *
- End Date:** *
- Original Proposal Number:** (with Search icon)
- Award #:** (with Search icon)
- Agency/Sponsor:** * (with Search icon)
- Prime Sponsor:** (with Search icon)
- Proposal Deadline Date:** (with calendar icon)
- NSF Science Code:** (dropdown menu)
- Anticipated Award Type:** (dropdown menu)
- Sponsor Proposal No.:** (text input)
- Title:** *
- Program Title:** (text input)
- Proposal in Response:** (dropdown menu)
- Sub Contract:** (checkbox)
- Funding Opportunity Number:** (text input)
- CFDA Number:** (text input)
- Agency Program Code:** (text input)
- Agency Div Code:** (text input)

Buttons at the bottom include 'Save', 'Print', 'Copy Proposal', 'Email', and 'Add New Rolodex Entry'.

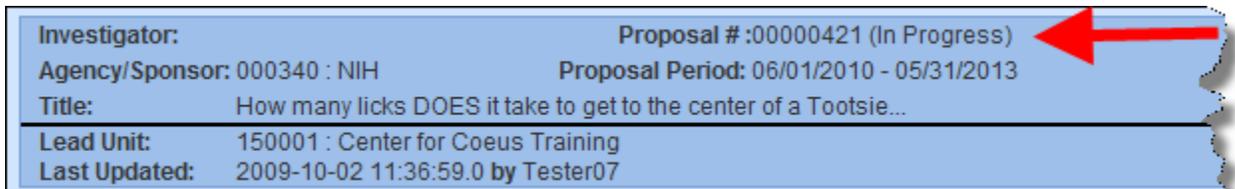
A. Enter your proposal information:

1. Fill in the all (*) fields and as much of the General Proposal Information Screen as possible.

* Proposal Type	Select the appropriate entry from the drop-down list. This information might be specified in the sponsor's announcement or guidelines.
* Activity Type	Select the appropriate entry from the drop-down list.
* Start Date	Date the project is expected to start. Enter in mm/dd/yy format or use the calendar tool.
* End Date	Date the project is expected to end. Enter in mm/dd/yy format or use the calendar tool.
Original Proposal Number	Required if the <i>Proposal Type</i> is Resubmission, Revision or Continuation. Use the <i>Search</i> icon to search the Institute Proposal module.
Award # (number)	Enter if the <i>Proposal Type</i> is Continuation, Renewal, or Revision. Leave this field blank for New, Resubmission, or Task Order. The Award # is a Coeus-generated number; to find it use the <i>Search</i> icon next to the field and search by Account number or other detail.
* Agency/Sponsor	The sponsor is the organization that will provide funding. Enter the sponsor's six-digit code in this field or use the <i>Search</i> icon to find it.
Prime Sponsor	If UC will be the subcontractor for the proposal, the prime sponsor is the agency

	from where the funds originated. If UC is not a sub, leave this field blank.
Proposal deadline date	Date the proposal is due at the sponsor.
Receipt/Postmarked	Select which option defines the deadline receipt requirement.
NSF Science Code	Select from the drop-down list if submitting to NSF.
Anticipated Award Type	Select the type from the drop-down list, if known.
Sponsor Proposal No. (number)	Required if the <i>Proposal Type</i> is Renewal, Resubmission, Revision, or Continuation. Search the Award module or Institute Proposal module, as appropriate, to find this number.
* Title:	Enter the descriptive title. For electronic submission, the title can contain no special characters. 200 character maximum; individual sponsors may require shorter titles. Refer to the sponsor instructions.
Program Title:	Enter a program title provided by the sponsor. If this proposal will be submitted via Grants.gov, this field will be overwritten when you associate the proposal with a Grants.gov opportunity.
Proposal in Response to:	Select an entry from the drop-down list to identify how this funding opportunity was announced. Select 'Federal' for proposals with a federal sponsor or prime sponsor.
Subcontract	UC is not using this field at this time.
Funding Opportunity Number	For paper submissions: enter data manually. For Grants.gov submissions: this will be populated automatically if CFDA is used to search and link. Otherwise, insert the Funding Opportunity Number to perform the Grants.gov search.
CFDA Number: (Federal only)	Catalog of Federal Domestic Assistance number assigned by sponsor for funding opportunity. For paper submissions: enter the data manually, if known. For Grants.gov submissions, enter the CFDA number to support the Grants.gov search. Note: some NIH opportunities do not assign CFDA numbers until after award. Use the Funding Opportunity search for those applications and leave the CFDA field blank unless it is populated automatically by the selected Grants.gov opportunity.
Agency Program Code:	Enter this number if it is required for the opportunity. Locate the code in the announcement of opportunity, at Grants.gov, or the sponsor's web site. This code is currently required only for NSF submissions, but it may be used by other agencies in the future
Agency Division Code:	Enter this number if it is required for the opportunity. Locate the code in the announcement of opportunity, at Grants.gov, or the sponsor's web site. This code is currently required only for NSF submissions, but it may be used by other agencies in the future

2. Select **Save** 
3. **Result:** Coeus assigns the next available proposal number, which will appear in the proposal header on all CoeusLite entry screens.



Investigator: Proposal #: 00000421 (In Progress)
 Agency/Sponsor: 000340 : NIH Proposal Period: 06/01/2010 - 05/31/2013
 Title: How many licks DOES it take to get to the center of a Tootsie...
 Lead Unit: 150001 : Center for Coeus Training
 Last Updated: 2009-10-02 11:36:59.0 by Tester07

B. For Grants.gov System-to-System (S2S) Candidates:

Grants.Gov

If you did not use the [Create Proposal](#) option from the Grants.gov Opportunity search to start your proposal, you will need to search and select a valid funding opportunity. Once you have entered and saved fields and the Opportunity ID or CFDA Number, you can navigate to the **Grants.gov** screen and Coeus will launch a search of Grants.gov for the sponsor's submission package. Linking to Grants.gov is only required if you intend to use the System-to-System (s2s) functionality. You must locate a valid opportunity in order for your application to be submitted electronically.



NOTE: Only federal agency opportunities are available at Grants.gov. You must enter a federal sponsor in the Sponsor field to perform the Grants.gov search.

1. Navigate to the Grants.gov screen:

Initial navigation to the Grants.gov screen links your proposal to a posted opportunity at Grants.gov. The General Info data fields for either CFDA Number or Funding Opportunity Number (aka Opportunity ID) – but not both - must be filled in to perform the search. A completed search retrieves the sponsor's electronic submission details for the application such as the list of mandatory and optional forms, program title, instructions, CFDA Number, Opportunity Number, etc, required for a successful proposal submission.

A warning will appear if there is no match to your entry. Review your entry for typographic errors or verify you entered the current opportunity listing from the sponsor's web page.



a. Grants.gov search results (partial screen shot from test instance: CFDA 00.000)

1. Click on the **show** option in the **Details** column to confirm selection:

Investigator:	000340 : NIH	Proposal # :	00000421 (In Progress)
Agency/Sponsor:	000340 : NIH	Proposal Period:	06/01/2010 - 05/31/2013
Title:	How many licks DOES it take to get to the center of a Tootsie...		

Grants.Gov			
Funding Opportunity Number:	Opportunity Title	Select	Details
PA-A1-S11	G.g AT07 and NIH Ext-UAT A1 Test FOA (S11)	Select	show
PA-A1-60C	G.g AT07 and NIH Ext-UAT A1 Test FOA (C06)	Select	show
PA-A1-1PD	G.g AT07 and NIH Ext-UAT A1 Test FOA (DP1)	Select	show
PA-A1-2PD	G.g AT07 and NIH Ext-UAT A1 Test FOA (DP2)	Select	show
PA-A1-3PD	G.g AT07 and NIH Ext-UAT A1 Test FOA (DP3)	Select	show
PA-A1-80G	G.g AT07 and NIH Ext-UAT A1 Test FOA (G08)	Select	show
PA-A1-11G	G.g AT07 and NIH Ext-UAT A1 Test FOA (G11)	Select	show
PA-A1-31G	G.g AT07 and NIH Ext-UAT A1 Test FOA (G13)	Select	show
PA-A1-80G	G.g AT07 and NIH Ext-UAT A1 Test FOA (G20)	Select	show
PA-A1-80G	G.g AT07 and NIH Ext-UAT A1 Test FOA (K02)	Select	show

2. Click on the **Instruction URL**: hyperlink to view the sponsor posted instructions, guide, or other information to aid the applicant.

PA-A1-10X	G.g AT07 and NIH Ext-UAT A1 Test FOA (X01)	Select	show
PA-A1-20X	G.g AT07 and NIH Ext-UAT A1 Test FOA (X02)	Select	show
PA-A1-23F	G.g AT07 and NIH Ext-UAT A1 Test FOA (F32)	Select	hide
Title: G.g AT07 and NIH Ext-UAT A1 Test FOA (F32) Starting Date: 2009-08-17 00:00:00.0 Closing Date: 2011-08-17 00:00:00.0 Schema url: http://at07apply.grants.gov/apply/opportunities/schemas/applicant/oppPA-A1-23F-cfda93.121-cidADOBE-FORMS-A1.xsd Instruction url: http://at07apply.grants.gov/apply/opportunities/instructions/oppPA-A1-23F-cfda93.121-cidADOBE-FORMS-A1-instructions.doc Competition Id: ADOBE-FORMS-A1			
PA-A1-33F	G.g AT07 and NIH Ext-UAT A1 Test FOA (F33)	Select	show
PAR-A1-20K	G.g AT07 and NIH Ext-UAT A1 Test OPT-OUT FOA (K02)	Select	show
PAR-A1-80K	G.g AT07 and NIH Ext-UAT A1 Test OPT-OUT A1 FOA (K...	Select	show
PAR-A1-10P	G.g AT07 and NIH Ext-UAT A1 Test OPT-OUT FOA (K01)	Select	show

3. Click on **Select** to choose this opportunity and retrieve the submission requirements, or click **hide** to close the detail panel; click **show** or **Select** another opportunity;

Grants.gov opportunity package review (continued)

1. Review list of required forms (forms must be marked **Available** in the **Desc** column if required for this s2s submission.

Forms hide				
Form Name	Mandatory	Include	Desc	Select to Print: All Included None
SFLLL V1-1		<input type="checkbox"/>	Available	<input type="checkbox"/>
ANA_ApplicationInfo		<input checked="" type="checkbox"/>	Not Available	<input type="checkbox"/>

2. Check the *optional* forms to Include for this submission (see sponsor opportunity instructions).

Forms hide				
Form Name	Mandatory	Include	Desc	Select to Print: All Included None
Budget V1-1		<input checked="" type="checkbox"/>	Available	<input type="checkbox"/>
Other Attachments V1-1		<input checked="" type="checkbox"/>	Available	<input type="checkbox"/>
SF 424 V2		<input checked="" type="checkbox"/>	Available	<input type="checkbox"/>
Attachments V1-1		<input type="checkbox"/>	Available	<input type="checkbox"/>
CD511 V1-1		<input type="checkbox"/>	Available	<input type="checkbox"/>

Click to check forms to Include in the Grants.gov submission.

3. Click the Save button (scroll to the bottom of the page) to save the Grants.gov selected opportunity and the forms you selected to include for this submission.



Save your selected opportunity and checked "to Include" forms.

Submit capability only available to authorized users.

c. Other Grants.gov screen functions:

Investigator: Hanlon, Rosemary **Proposal #:** 00003589 (In Progress)
Agency/Sponsor: 000500 : NSF **Proposal Period:** 01/01/2009 - 12/31/2011
Title: Coeus 4. Proposal Development User Guide Sample Proposal

Grants.Gov

Submission Details (Refresh) show

Opportunity hide

Funding Opportunity Number: APP-S2S-TEST-SF424-V2
Opportunity Title: SF424 Form Family Version 2.0
Submission Type:

Revision

Increase Award Decrease Award Other(Specify)
 Decrease Duration Increase Duration

CFDA Number: 00-000 **Competition Id:**

**Click individual boxes to select a form to print/preview.
 Selections checked generates a list of forms to print. (print button at bottom of screen)
 Click All Included to auto-select forms already checked to Include.
 Deselect by clicking None**

Forms hide

Form Name	Mandatory	Include	Desc	Select to Print: All Included None
Budget V1-1		<input checked="" type="checkbox"/>	Available	<input type="checkbox"/>
Other Attachments V1-1		<input checked="" type="checkbox"/>	Available	<input type="checkbox"/>
				<input type="checkbox"/>

Not active until proposal is submitted to Grants.gov

Change the opportunity selected (only valid if multiple listed in one posting)

Removes the opportunity; deletes Program Title; Funding Opportunity & CFDA from the General info Screen

Performs Grants.gov validations

Generates printable PDFs of selected forms

Refresh | Select Another Opportunity | Delete Opportunity | Validate | Print Selected Forms

Save **Submit to Grants.gov**

Save the selected opportunity and forms selected.

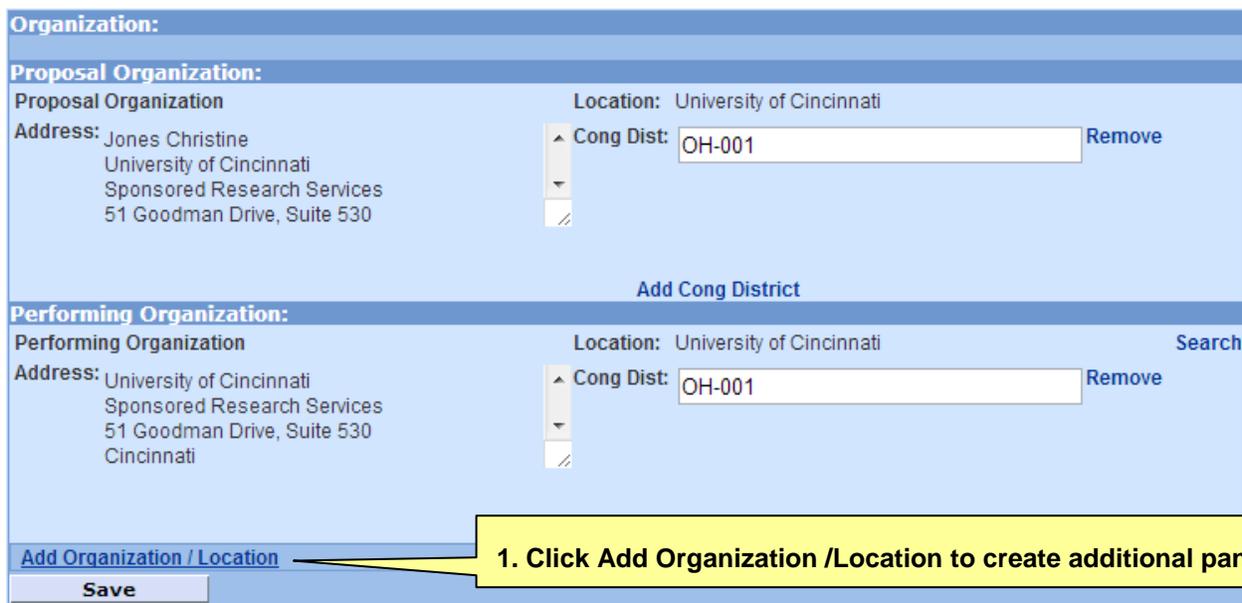
Submit capability only available to authorized users.

2. Navigate to the Organization Screen to enter Additional Performing Organizations or Sites

Organization

The Organization screen contains the UC contacts and performing sites involved in the project. The data for UC is maintained by SRS ERA, but may be modified for individual submissions.

Proposal Organization	The legal entity for the proposal. When a proposal is created, this defaults to UC.
Performing Organization	The organization performing the main portion of the project. There is only one, and for UC, this is the same as the Proposal Organization (UC).
Other Organization/Location	Other Organizations are other participants in the project, often recipients of a subcontract.
Performance Site/ Location	A site where work is being done that is not an organization (e.g. a volcano, a field camp location, or other significant off campus location that should be recognized in the proposal).



The screenshot shows the 'Organization' screen with two main sections: 'Proposal Organization' and 'Performing Organization'. Both sections have a 'Location' field set to 'University of Cincinnati' and a 'Cong Dist' dropdown menu set to 'OH-001'. A 'Remove' button is next to the 'Cong Dist' field in both sections. Below the 'Performing Organization' section is an 'Add Cong District' button. At the bottom left, there is an 'Add Organization / Location' button and a 'Save' button. A yellow callout box with a pointer to the 'Add Organization / Location' button contains the text: '1. Click Add Organization /Location to create additional panels.'

The **Proposal Organization** Address and Congressional District are populated from the centrally maintained data. The Proposal Organization cannot be removed. Use the **Remove** function to delete the supplied Congressional District. Use **Add Congressional District** function to insert a new field for the data, or multiple fields, if appropriate.

The **Performing Organization** Location can be changed, but the address will not update from the centrally maintained data. Congressional Districts can be modified.

Use the **Add Organization/Location** function to perform a search to populate the required fields.

For **Other Organizations**, the Coeus Organization Table will be searched and the returned result will include the Location, Address, and Congressional District. If you do not find your organization, then contact coeus@uc.edu to have it added to Coeus. Using Other Organization will support populating DUNS Number to certain sponsor forms.

For **Performance Site**, the Location field must be manually entered, the Rolodex must be searched for the Address, and then the Congressional District field must be added and typed in. Rolodex does not support providing DUNS numbers to sponsor forms. If DUNS is required for your submission, use Other Organization.

To add an Other Organization from the Coeus Organization Table.

Add Organization / Location

Type: Remove

Address: Find Address | Remove Address

Location:

Cong Dist:

Save

Once Other Organization type is selected the Location and Find/Remove address fields will be replaced with a Search function.

Add Organization / Location

Organization / Location:

Type: Remove

Address:

Location: Search

Cong Dist:

Save

Add Cong District

Use the Search function to locate the Organization.

- Select [Add Organization/Location](#)
- Select **Type: Other Organization** from drop-down menu
- Select **Search** to open Organization Search window
- Enter the search criteria and select **Search**
- Select a result or perform the search again to locate
- If required, select **Add Cong Dist**: to generate a field for the congressional district. If the data is in the Organization Table, it will automatically populate. (Repeat Add if needed for multiple fields)
- Enter the congressional district in the 2 character State, hyphen, 3-character District format. (AA-000)
- Select **Save** to keep the Other Organization

Organization Search - Windows Internet Explorer

http://coeus-test.mit.edu/coeus42/generalProposalSearch.do?type=Organization%20Search&search=true&search=

Please enter search criteria of the form ^value* or ^value or value* in any of search fields.

Id: Name: *hopkins*

Search Cancel

Done Internet

Search for Organization. Selection from Results will populate here.

Organization / Location:

Type: Remove

Address: Johns Hopkins University, School of Medicine
733 N. Broadway Street, Suite 117
Office of Research Administration
Baltimore
MD

Location: Johns Hopkins University, School of Medicine Search

Cong Dist: MD-007 Remove

Save

Add Cong District

Search for Organization. Selection from Results will populate here.

To add a Performance Site (Location Address) from the Coeus Rolodex.

- Select [Add Organization/Location](#)
- Select **Type: Performance Site** from drop-down menu
- Enter a contact name in the **Location** field
- Select **Find Address** to open the Rolodex Search window
- Enter the criteria and select **Search**
- Select a result or perform the search again to locate
- Select **Add Cong Dist:** to generate a field for the congressional district. (Repeat if needed for multiple fields)
- Enter the congressional district in the 2 character State, hyphen, 3 character District format. (AA-000)
- Select **Save** to keep the Performance Site

To Delete Other Organizations or Performance Sites:

Select **Remove (Type)** to delete the entry.

To Delete Congressional Districts:

Select **Remove (Cong. Dist)** to remove the entry.



If all districts in a state are affected, enter "all" for the district number (ex. HI-all)
 If nationwide (all districts in all states), enter US-all
 If the program/project is outside the U.S., enter 00-000

3. Navigate to Investigators & Key Personnel

Investigators/Key Persons

Investigators/Key Study Personnel Details
Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.
 Unit is required for Investigators.
 Key Person Role is required for Key Personnel.

[Employee Search](#) | [Non Employee Search](#)

Name: Email: Phone:
 Agency Credentials: Fax: Mobile:
 Unit: [Search](#)
 Proposal Role: Multi PI % Effort:
 % Academic Year Effort: % Summer Year Effort: % Calendar Year Effort:

List of Investigators/Key Study Personnel COI Disclosure Status

Name	Department	LU	MPI	Role	% Effort				Certify
					T	A	S	C	

A. Search for and add the Principal on the Investigators/Key Persons screen.

- [Employee Search](#) Employee Search will locate persons maintained in Coeus from the UC HR system.
- [Non Employee Search](#) Non Employee Search will locate persons maintained in the Coeus Rolodex.

B. Edit the PI's maintained data:

1. **Modify** or revise contact information
2. **Enter** Agency Credentials for any Grants.gov submission using the R&R Senior/Key Person Profile form. This field will populate the "Credential" field, e.g. agency login IE eRA Commons User Name goes here.
3. **Enter** estimated percent of effort over the proposed project period – this field is used to document obligated effort as part of the UC Reporting System.
4. **Enter** estimated Academic/Summer/Calendar year effort
5. **Select** Multi PI, if relevant to your submission (see key box below).
6. **Select Save**



By default, the first individual entered is designated with Role: Principal Investigator. Use the Multi PI checkbox to designate Investigators as Multiple PI (*including* the Principal Investigator). The Principal Investigator role will be recognized as the Contact PI by NIH. At this time, **NIH is the only sponsor that utilizes Multi PI; please review your NIH opportunity for more eligibility and submission requirements.**

[Employee Search](#) | [Non Employee Search](#)

Name: Email: Phone:
 Agency Credentials: Fax: Mobile:
 Unit: [Search](#) RES SRS Electronic Researc
 Proposal Role: Multi PI % Effort:
 % Academic Year Effort: % Summer Year Effort: % Calendar Year Effort:

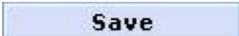
Result: Saved person is added to lower pane List of Investigators/Key Study Personnel

List of Investigators/Key Study Personnel					COI Disclosure Status				Certify
Name	Department	LU	MPI	Role	T	A	S	C	
Carole H Donnellon	• COM Internal Medicine	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Principal Investigator	0.0	0.0	0.0	0.0	Remove <input type="button" value="✘"/> Details

C. Search and add Co-Investigators and Key Study Persons. (Other Proposal Roles can only be added after a PI is entered and saved)

Enter Co-Investigator: Proposal Role Co-Investigator defaults next, or select Key Study Person from drop-down list.

1. **Search** Employee or Non-Employee
2. **Modify** or enter contact or information
3. **Enter** Commons User Name (for NIH, this is required for Investigators designated as Multi-PI)
3. **Enter** estimated percent of effort of proposed project period
4. **Enter** estimated Academic/Summer/Calendar year effort
5. **Select** Multi PI, if relevant.
6. **Select** Co-Investigator from Proposal Role drop-down list.
7. **Select Save**



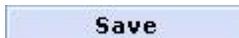
Investigators/Key Study Personnel Details
Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.
 Unit is required for Investigators.
 Key Person Role is required for Key Personnel.

[Employee Search](#) | [Non Employee Search](#)

Name: Email: Phone:
 Agency Credentials: Fax: Mobile:
 Unit: [Search](#)
 Proposal Role: Multi PI % Effort:
 % Academic Year Effort: % Summer Year Effort: % Calendar Year Effort:

Enter Key Study Person(s): Key Person Role field presented.

1. **Search** Employee or Non-Employee
2. **Modify** or enter contact and unit information
3. **Enter** Commons User Name, if relevant
3. **Enter** estimated percent of effort of proposed project period
4. *Note: intentionally disabled (grayed out) for Key Study Person - Academic/Summer/Calendar year effort*
5. **Select** Proposal Role Key Study Person from the drop-down list
6. **Enter** or modify Key Person Role in presented field – defines this persons specific activity on this project.
7. **Select Save**



Investigators/Key Study Personnel Details
Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.
 Unit is required for Investigators.
 Key Person Role is required for Key Personnel.

[Employee Search](#) | [Non Employee Search](#)

Name: Email: Phone:
 Agency Credentials: Fax: Mobile:
 Unit: [Search](#) RES SRS Electronic Research
 Proposal Role: Key Person Role: % Effort:
 % Academic Year Effort: % Summer Year Effort: % Calendar Year Effort:

When Key Study Person is the selected Proposal Role; Key Person Role field is presented. Entering this project role is mandatory. This will populate with the person's UC title for employees. Change it to the role on this project.

Optional Key Person Unit Maintenance

The 4.5 release provides the ability to maintain Units to the Key Persons. Key Person units are added to the proposal’s approval routing schema.

Investigators/Key Study Personnel Details
Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.
 Unit is required for Investigators.
 Key Person Role is required for Key Personnel.

[Employee Search](#) | [Non Employee Search](#)

Name: Email: Phone:

Agency Credentials: Fax: Mobile:

Unit: [Search](#) RES SRS Electronic Researc

Proposal Role: Key Person Role: % Effort:

% Academic Year Effort: % Summer Year Effort: % Calendar Year Effort:

Follow the standard instructions for adding Key Persons. Their home unit will populate in the Unit maintenance panel. Units may be searched and edited during the Add process, or by editing Details.

Adding a Key Person Unit during Person Search

1. **Search** Employee or Non-Employee
2. **Modify** or enter contact
3. **Search** for Unit if the unit is not displayed.
4. **Enter** Agency Credentials, if relevant
5. **Enter** estimated percent of effort of proposed project period
6. *Note: intentionally disabled (grayed out) for Key Study Person - Academic/Summer/Calendar year effort*
7. **Select** Proposal Role Key Study Person from the drop-down list
8. **Enter** or modify Key Person Role in presented field – defines this persons specific activity on this project.
9. **Select Save**



Once the Key Study Person is saved, the maintained unit will be listed in the Department column. See the section E on Customizing Person Details for specific instructions on maintaining more units and deleting units.

List of Investigators/Key Study Personnel					COI Disclosure Status						
Name	Department	LU	MPI	Role	T	A	S	C	Remove	Certify	
Carole H Donnellon	• COM Internal Medicine	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	<input checked="" type="checkbox"/>	Details
Ketaki Ashutosh Mhaisekar	• RES SRS Electronic Research			Collaborator	0.0	0.0	0.0	0.0	Remove	<input type="checkbox"/>	Details

D. Review Proposal Personnel

Investigators/Key Study Personnel Details

*Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.
Unit is required for Investigators.
Key Person Role is required for Key Personnel.*

[Employee Search](#) | [Non Employee Search](#)

Name: Email: Phone:
 Agency Credentials: Fax: Mobile:
 Unit: [Search](#)
 Proposal Role: Key Person Role: % Effort:
 % Academic Year Effort: % Summer Year Effort: % Calendar Year Effort:

List of Investigators/Key Study Personnel										COI Disclosure Status	
Name	Department	LU	MPI	Role	% Effort				Remove	Certify	Details
					T	A	S	C			
Carole H Donnellon	• COM Internal Medicine	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	<input checked="" type="checkbox"/>	Details
Ketaki Ashutosh Mhaisekar	• RES SRS Electronic Research			Collaborator	0.0				Remove	<input type="checkbox"/>	Details

1. **Name:** list of Investigators and Key Persons in order of entry.
2. **Department** is the primary unit for the listed person.
3. **LU** is the Lead Unit for this proposal.
4. **MPI** check mark will populate to designate Multi PI.
5. **Role** is the Proposal Role applied or entered for the listed person.
6. **% Effort**
 - a. **T** is Total effort
 - b. **A** is Academic effort
 - c. **S** is Summer effort
 - d. **C** is Calendar effort
7. **Remove:** use to delete the named person entry.
8. **Certify:** open the Certify Investigator window and answer, review or print the answered questions.
 - Signifies certification is not completed.
 - Signifies certification is complete.
10. **Details:** select to open the Person Detail window to review, add, or modify contact and degree information.

List of Investigators/Key Study Personnel										COI Disclosure Status	
Name	Department	LU	MPI	Role	% Effort				Remove	Certify	Details
					T	A	S	C			
Carole H Donnellon	• COM Internal Medicine	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	<input checked="" type="checkbox"/>	Details
Ketaki Ashutosh Mhaisekar	• RES SRS Electronic Research			Collaborator	0.0				Remove	<input type="checkbox"/>	Details

Red X indicates Certification is not complete.

E. Customize Proposal Person Details

Select **Details** (click on the word “Details”) to open the Person Details screen.

List of Investigators/Key Study Personnel							COI Disclosure Status				
Name	Department	LU	MPI	Role	% Effort				Certification		
					T	A	S	C			
Carole H Donnellon	• COM Internal Medicine	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	<input checked="" type="checkbox"/>	Details
Ketaki Ashutosh Mhaisekar	• RES SRS Electronic Research			Collaborator	0.0				Remove		Details

1. **Add Unit**, if needed, to support approval routing and credit split.

a. Select **Add Unit**



Do not delete the PI Lead Unit entered by Coeus. The Lead Unit for the PI must match the Lead Unit for the proposal. If this is the wrong Lead Unit for this investigator or proposal, you must copy or create a new proposal in the correct unit. Otherwise, Use **Add Unit** to amend the list of units required to support routing and credit split.

Person Details for Carole H Donnellon [Return to Investigator](#)

Unit Details

Lead Unit Number	Unit Name	
<input checked="" type="checkbox"/> 60000342	COM Internal Medicine	Search Remove

[Add Unit](#) ←

Person Details

Full Name:	<input type="text" value="Carole H Donnellon"/>	User Name:	<input type="text" value="DONNELCH"/>
Email Address:	<input type="text" value="DONNELCH@UCMAIL.UC.EDU"/>	Office Phone:	<input type="text" value="558-2499"/>
Primary Title:	<input type="text" value="Grant Administrator 2"/>	Directory Title:	<input type="text" value="Grant Admin 2"/>
Home Unit:	<input type="text" value="60000284"/>	School:	<input type="text"/>
Agency Credentials:	<input type="text"/>	Fax:	<input type="text"/>
Pager:	<input type="text"/>	Mobile:	<input type="text"/>
Office Location:	<input type="text" value="0222"/>	Sec.Office Location:	<input type="text"/>
Address Line 1:	<input type="text" value="UNIV HALL 540"/>	Address Line 2:	<input type="text" value="P. O. Box 210222"/>
Address Line 3:	<input type="text"/>	City:	<input type="text" value="Cincinnati"/>
County:	<input type="text"/>	State/Province:	<input type="text" value="Ohio"/>
Postal Code:	<input type="text" value="45221"/>	Country:	<input type="text" value="USA"/>
Division:	<input type="text" value="VP for Health Affairs"/>		

Degrees

Degree Type	Degree	Graduation Year	School:
Add Degree			

b.. Select **Search** of centrally maintained Units.

Person Details for Carole H Donnellon [Return to Investigator](#)

Unit Details

Lead Unit Number	Unit Name		
<input checked="" type="checkbox"/> 60000342	COM Internal Medicine	Search	Remove
<input type="checkbox"/>		Search	Remove

[Add Unit](#)

Use Search to locate Unit Number

c. Enter search criteria to locate Unit number.

• Please enter search criteria of the form *value* or *value or value* in any of search fields.

Unit Number: Unit Name:

Administrative Officer: Unit Head:

Dean VP: Other Ind To Notify:

Osp Administrator:

[Search](#) [Cancel](#)

d. Select a Unit, search again, or close the window.

Unit Search Result

[Search Again](#) [Close Window](#)

UNIT_NUMBER	UNIT_NAME	ADMINOFFICER	UNITHEAD	DEANVP	NOTIFY	ADMINTR
60000281	RES SRS Grants		Christine C. Jones	Deborah J. Galloway		Carole H Donnellon
60000282	RES SRS Contracts		Diane L Sparks	Deborah J. Galloway		Carole H Donnellon
60000284	RES SRS Electronic Research		Christine C. Jones	Deborah J. Galloway		Carole H Donnellon
60000991	RES SRS Sponsored Program Accounting		John G. Ungruhe	Deborah J. Galloway		Carole H Donnellon

[Search Again](#) [Close Window](#)

e. Confirm selection: Unit applied to Proposal Person Details:

Person Details for Carole H Donnellon [Return to Investigator](#)

Unit Details

Lead Unit Number	Unit Name		
<input checked="" type="checkbox"/> 60000342	COM Internal Medicine	Search	Remove
<input checked="" type="checkbox"/> 60000284	RES SRS Electronic Research	Search	Remove

[Add Unit](#)

f. Select **Save** at the bottom on the screen.

[Save](#)

2. Person Details: revise any white-background field entries as required for this proposal.



Changes made to Person Details on this screen will not update institute or Coeus person data; changes will only be applied and retained in this proposal record.

- A. Modify entries as needed. White-background fields are editable.
- B. Insert the **Agency Credentials** aka eRA Commons User ID For system-to-system submissions (s2s) utilizing the RR Senior/Key Person Profile form, this field populates the "Credential; e.g. agency login" field. Enter the sponsor-specific user ID appropriate to your submission e.g. NIH eRA Commons ID, NSF Fastlane ID, etc.
- C. Provide Full Address, Phone and E-mail for Grants.gov submissions.

Person Details			
Full Name:	Carole H Donnellon	User Name:	DONNELCH
Email Address:	DONNELCH@UCMAIL.UC.EDU	Office Phone:	558-2499
Primary Title:	Grant Administrator 2	Directory Title:	Grant Admin 2
Home Unit:	60000284	School:	
Agency Credentials:		Fax:	
Pager:		Mobile:	
Office Location:	0222	Sec.Office Location:	
Address Line 1:	UNIV HALL 540	Address Line 2:	P. O. Box 210222
Address Line 3:		City:	Cincinnati
County:		State/Province:	Ohio
Postal Code:	45221	Country:	USA
Division:	VP for Health Affairs		

3. Degree Details:

Review and modify degree data, if any, imported from the HR system; Add Degrees, Delete Degrees (not shown) if incorrect.

Degrees				
Degree Type	Degree	Graduation Year	School	
Add Degree				

Result: Fields generated to enter degree. Select Type from list, type in other field data; **Save.** Save

Degrees				
Degree Type	Degree	Graduation Year	School	
-----Please Select-----				Remove
Add Degree				

Degrees				
Degree Type	Degree	Graduation Year	School	
Master of Information Systems	MBA	2002	Whatsa Matta U	Remove
Add Degree				

4. Certify PI

All PI's must answer certification questions **before a proposal can be routed for approval.**

Save		Certify		Send Notification		NEW					
List of Investigators/Key Study Personnel								COI Disclosure Status			
Name	Department	LU	MPI	Role	T	A	S	C	Remove	Certify	Details
Carole H Donnellon	• COM Internal Medicine • RES SRS Electronic Research	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	✗	Details
Ketaki Ashutosh Mhaisekar	• RES SRS Electronic Research			Collaborator	0.0				Remove		Details

To Send Notification:

1. Click the **Send Notification** button

Send Notification

Select	Name	Last Notification
<input type="checkbox"/>	Ketaki Ashutosh Mhaisekar	
<input checked="" type="checkbox"/>	Carole H Donnellon	

Select: All | None

2. In the SEND NOTIFICATION window select the PI. Only the PI is required to certify the proposal.
3. **Click the Send** button to generate the notification. Click OK in the confirmation window.
4. **Click the Close** button to close the window.
5. Once notifications have been sent, the date and time of the **Last Notification** is displayed in the window Repeat, as needed. Notifications can be sent again, to some or all proposal personnel. Repeat the steps above. If the PI cannot find the email with the link, then repeat step 1. You do not need SRS to resend the email.

Note: The Red X has changed to a green ✓

List of Investigators/Key Study Personnel								COI Disclosure Status			
Name	Department	LU	MPI	Role	T	A	S	C	Remove	Certify	Details
Carole H Donnellon	• COM Internal Medicine • RES SRS Electronic Research	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	✓	Details
Ketaki Ashutosh Mhaisekar	• RES SRS Electronic Research			Collaborator	0.0				Remove		Details

5. Navigate to Credit Split

Credit Split

Investigator: Carole H Donnellon Proposal #: 00001188 (In Progress)
 Agency/Sponsor: H00003 : National Institutes of Health Proposal Period: 03/01/2011 - 02/29/2012
 Title: Sample for Screen Shot3 

Credit Split:	
	Recognition
Steven S. Manning	50.00
60000281 - RES SRS Grants	100.00
Unit Total	100.00
Carole H Donnellon (PI)	50.00
000001 - University of Cincinnati	100.00
Unit Total	100.00
Investigator Total	100.00

NOTES: Each investigator's department needs to receive 100% credit and the Investigator Total must equal 100.

Check with your department BA or your Authorized Official for business rules regarding credit split.

5. Navigate to Special Reviews

Special Review

Special Reviews [Proposal No. - 00003592]

*Indicates Required Fields

Special Review

*Special Review : *Approval:

Protocol No: Application Date: Approval Date:

Comments:

Save

The SPECIAL REVIEW screen is used to identify research that requires special review or approval, such as work with human subjects, animals, or recombinant DNA.

1. **Click** Add Special Review to generate the input fields.
2. **Click** the drop-down box in the field labeled Special Review
3. **Select** the type of Review that applies to the proposed project
4. **Click** the drop-down box in the field labeled Approval
5. **Select** a status appropriate to the review. If:
 - The status is **ARRA**, then the proposal is for federal stimulus funding.
 - The status is **Approved**, then a protocol number must be entered in the Protocol Number field and an approval date entered into the Approval Date field.
 - The status is **Exempt**, then the exempt code (letter and number, i.e. E4) must be entered in the Comments field. Multiple exempt codes should be separated by a comma (i.e. E1,E4).
 - The status is **Not Yet Applied**, then appropriate submission must be complete before the proposal is awarded.
 - The status is **Pending**, then all required information has been entered.
6. **Save** the entry. **Save**

Select Special Review from drop-down list; select Approval Status from drop-down list; select Save.

Special Review

*Special Review : *Approval:

Protocol No: Application Date: Approval Date:

Comments:

Results:

List of Special Review

Special Review	Approval	Protocol No	Application Date	Approval Date	Comments
Animal Usage	Pending				View Remove

- Select **View** to see the Comments entered for that Special Review.
- Select **Remove** to delete the review.

6. Navigate to Others

Others

Enter Inspires User Name if applicable to your proposal – NASA submissions only.

Others
* Indicates Mandatory Fields

NSPIRES USER NAME

Save

7. Abstract -UC is not using the Abstract Section at this time

8. YNQ -YNQs were replaced by the Smart Questionnaire

9. Assign Proposal Roles

Proposal Roles

Proposal Roles			
[-] Aggregator Add User			
User ID	User Name	Home Unit	
DONNELCH	Carole H Donnellon	000001 : University of Cincinnati	Remove
MANNINSS	Steven S. Manning	000001 : University of Cincinnati	Remove
[-] Approver			
User ID	User Name	Home Unit	
[-] Narrative Writer Add User			
User ID	User Name	Home Unit	
[-] Budget Creator Add User			
User ID	User Name	Home Unit	
[-] Viewer Add User			
User ID	User Name	Home Unit	

Select to perform search of available Coeus users.

Select to remove user
(the remove option is disabled when there is only one aggregator – you must have one aggregator)

Check the roles that have been assigned for your proposal on the **Proposal Roles** screen, and make changes as necessary. Any roles you assign to a user apply only to the current proposal. If you copy a proposal, access rights do not carry over. Access rights apply only to the specific proposal number in which they are granted.

1. Click [Add User](#) at Role category line
2. **Search** (users must have Coeus ID)
3. **Select** the user: they will be added to the role category

To Remove a user:

1. Click [Remove](#) on the right-most edge for the user to remove from the proposal role.
Note: the Aggregator Remove function is disabled if there is only one aggregator present. If you wish to remove that user, you must add another Aggregator first.

Role	Definition
Aggregator	Make changes to any part of the proposal, answer yes/no questions, and submit for approval.
Approver	Approve the proposal. You cannot add or delete users from this role, but you can see which users have been designated as approvers after the proposal is routed for approval. The list of approvers is maintained by SRS ERA.
Budget creator	Create and edit the budget.
Narrative writer	Create and edit the narratives.
Viewer	View any part of the proposal. Cannot edit.

10. Questionnaire

Questionnaire may appear in the navigation panel if a questionnaire has been designated as mandatory or optional for this particular proposal record. If the questionnaire is mandatory, you will be alerted when the Coeus proposal validations are performed, or when attempting to validate or print/preview certain Grants.gov forms. The UC specific Questionnaire is required for all proposals.

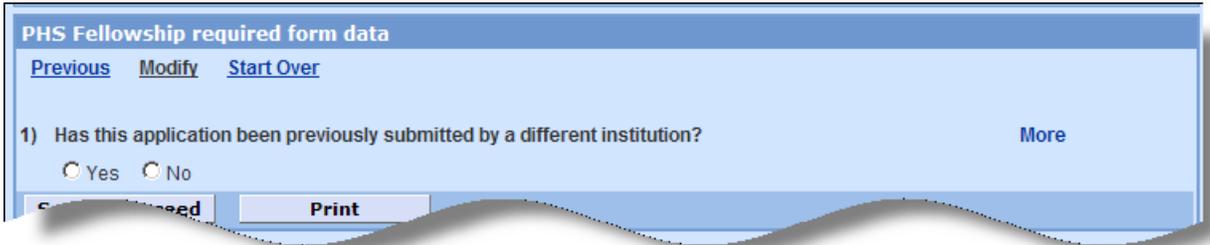
Open the Questionnaire by clicking the questionnaire name.

	Save if there is only one panel of questions, the Save button will appear.
	Save & Proceed button will appear if there are additional questions to answer after this panel.
	Save & Complete button will appear when modifying a previously completed Questionnaire. The button will <i>not</i> appear if there are additional questions to answer due to a changed response.
<u>Previous</u>	Previous allows a user to scroll back to the last question answered.
<u>Modify</u>	Modify (edit) to open a previously completed questionnaire.
<u>Start Over</u>	Start Over deletes all prior answers and returns the user to the beginning of the Questionnaire. Start over is active while a questionnaire is being answered. To start over a <i>completed</i> questionnaire, with the questionnaire name selected, click Modify, and then click the Start Over.
	Print will open a new browser window with a PDF report of the questions and answers. Click the Print button prior to answering to review all the possible questions off-line. The print report for a completed questionnaire will contain only the pairs of questions with answers (dependent Questions that did not apply will not print on the final report).
Exit	Select another Navigation button

1. Questions may need to be answered by:
 - clicking a radial button to respond to Yes/No, or Yes/No/NA,
 - Selecting a Date from the calendar tool
 - Entering text
 - Selecting from a defined list

Answer each question in the panel, and then click **Save & Proceed** to present the next question(s).

2. The **“More”** button may contain additional information to help you understand and answer the question.



PHS Fellowship required form data

[Previous](#) [Modify](#) [Start Over](#)

1) Has this application been previously submitted by a different institution? [More](#)

Yes No

[Save & Proceed](#) [Print](#)

3. Once the questions in view are answered, click **Save** or **Save & Proceed** to present the next question(s).
4. If you did not answer a question, or did not conform to the answer requirements, a notification window will open identifying the question to complete.
5. With all applicable questions answered, a notification window will open confirming that the questionnaire is complete. Click **OK** to close the alert. A green check mark will appear beside the questionnaire name to visually confirm that it has been answered.
6. Close the Questionnaire for Proposal (record number) window.

Smart S2S Questionnaire for Grants.gov forms



In Coeus 4.5, several Grants.gov forms are now mapped to a Smart s2s Questionnaire. Previously, these forms utilized YNQ questions that *always* had to be answered. Now, the system presents a Questionnaire with *only* the relevant questions for the Grants.gov forms that are required or selected to be included in the linked opportunity.

FORMS	Versions
SF 424 R&R	1-0, 1-1, 1-2
SF 424	1-0, 2-0, 2-1
RR Other Project Info	1-0, 1-1, 1-2, 1-3
RR Other Project Info	1-0, 1-1
PHS398 Cover Page Supplement	1-3, 1-4
PHS398 Checklist	1-1, 1-3
ED SF 424 Supplement	1-1
NASA PI and AOR Supplemental Data Sheet	1-0
NASA Other Project Information	1-0

The new Smart Questionnaire requires an opening question. Please select **Questions for Grants.gov S2S Forms**:

The screenshot shows a web interface for a questionnaire. On the left is a navigation menu with items like 'Proposal Summary', 'General Info', 'Organization', 'Investigators/Key Persons', 'Credit Split', 'Special Review', 'Abstract', 'Science Code', 'Others', 'YNQ', 'Proposal Roles', 'Questionnaire', 'PHS Fellowship Form-required data', 'NSFCover Page -required for g.gov submissions', 'PHS398 Training Budget V1-0', 'PHS Fellowship Form V1-2', 'Questions for Grants.gov S2S Forms' (highlighted with a red arrow), and 'UC Policy Questions'. The main content area shows the following information:

Investigator: Carole H Donnellon Proposal #: 00011592 (In Progress)
 Agency/Sponsor: H00003 : National Institutes of Health Proposal Period: 07/20/2013 - 07/19/2017
 Title: Coeus is the University's Proposal and Award System of Record...

Questions for Grants.gov S2S Forms

[Previous](#) [Modify](#) [Start Over](#)

1) Is this a Grants.gov system-to-system (s2s) submission? If Yes, you will be presented with questions related to the forms in your sponsor opportunity. [More](#)

Yes No

[Save & Proceed](#) [Print](#)



The forms in the S2S Smart Questionnaire are usually Mandatory. But if any are optional, be sure to click to Include them in your application to generate those questions in the Questionnaire.

11. Navigate to Budget

Budget

Once you have saved a proposal, you can click the **Budget** link on the proposal navigation panel. The navigation options change when you access the Budgeting screens. To return to the other proposal screens from the Budget, select the **Return to Proposal** link at the top of the Budget navigation panel.

Proposal Navigation Menu	Budget Navigation Menu
<ul style="list-style-type: none"> Proposal Summary ✓ General Info ✓ Organization ✓ Investigators/Key Persons ✓ Credit Split Special Review Abstract Science Code Others YNQ ✓ Proposal Roles Questionnaire PHS Fellowship Form-required data NSFCover Page -required for g.gov submissions PHS398 Training Budget V1-0 PHS Fellowship Form V1-2 ✓ Questions for Grants.gov S2S Forms >> ✓ UC Policy Questions Grants.Gov Budget Upload Attachments Submit for Approval Print Delete Proposal Copy Proposal Email Add New Rolodex Entry 	<ul style="list-style-type: none"> Return To Proposal ✓ Budget Versions ✓ Budget Summary Print Budget Set Up ✓ Personnel >> Adjust Periods ✓ Proposal Rates Validate Sync Calculated Line Item costs Budget Periods Personnel Budget Equipment Travel Participant/Trainee Other Direct Costs Modular Budget Cost Sharing Distribution Under Recovery Distribution Project Income Generate All Periods Sub Award Budget

Viewing the Budget using the Print Feature

The **Print** feature will generate a PDF report of the budget that allows you to view all budgeted expenses. The *Budget Summary by Period* report is particularly useful; this is the budget format displayed during the Coeus Web Proposal Approval process. Most internal approvers evaluate this comprehensive view of the budget during their review process.

The diagram illustrates the process of generating a budget report. On the left, a snippet of the 'Budget Navigation Menu' shows the 'Print' button highlighted with a red arrow pointing to the right. On the right, a 'Proposal Print' report window is shown, containing a table of report options with checkboxes for printing budget comments.

Report Name	Print Budget Comments
Budget Summary by Period	<input type="checkbox"/>
Cost Sharing Summary by Period	<input type="checkbox"/>
Cumulative Budget	<input type="checkbox"/>
Budget Total	<input type="checkbox"/>
Industrial Budget by Period	<input type="checkbox"/>
Industrial Cumulative Budget	<input type="checkbox"/>

Navigating the CoeusLite Budget Screens

	Return To Proposal	Select to return the general proposal navigation panel.
	Budget Versions	Displays a summary line for all budget versions created. Default budget launch screen when more than one budget version exists.
	Budget Summary	Displays summary budget information; i.e. budget totals, direct and indirect costs, underrecovery (not used at UC), cost sharing, period budget totals, etc.
	Print	Navigates to the Budget print options screen
	Budget Set Up	Group header for budget set up screens
	Personnel	Add personnel for budgeting; enter salary details required for expense calculations.
	Adjust Periods	Allows users to modify budget start and end dates, or to add or modify budget periods, or period lengths.
	Proposal Rates	Displays institute overhead rates; allows for insertion of applicable rates.
	Validate	Use the Validate tool to process any maintained Budget Business Rule Validations.
	Sync Calculated Line Item costs	Updates formulated costs with current rates
	Budget Periods	Group header for Budget Costs Input screens
	Personnel Budget	Add or remove personnel expense, customize their effort and time spent on this project.
	Equipment	Add or remove equipment expenses
	Travel	Add or remove travel expenses
	Participant/Trainee	Add or remove participant/trainee expenses
	Other Direct Costs	Add or remove all other expenses
	Modular Budget	Navigate to Modular Budget entry screen
	Cost Sharing Distribution	Navigate to Cost Sharing Distribution entry screen
	Under Recovery Distribution	Not in use by UC at this time.
	Project Income	Navigate to Project Income entry screen
	Generate All Periods	Calculate budget periods based on period 1 entries and create required additional budget period screens.
	Sub Award Budget	Navigate to the Subaward Upload screen.

Before you start your budget...

A note about Coeus Budget Calculations

If you have been using other programs or using spreadsheets to calculate your budget, you may notice that those calculations and Coeus calculations are slightly different.

Coeus calculates budget amounts based on a complex equation that uses a number of different variables such as, number of days of effort, percentage of inflation, overhead and fringe benefits, as well as the data you have entered on the **Budget Set Up > Personnel** screen regarding appointment types, base salaries, and effective dates.

Coeus does not average, and rounds from a much greater number of significant figures than a spreadsheet.

All of these factors result in a budget with a high degree of precision.



Turn Off Pop-up Blocker! Check the pop-up blocker settings for your web browser so you can be sure to Always Allow Pop-Ups from CoeusLite.

If while trying to view the details in the **Budget Periods** screens of your budget (**Personnel, Equipment, Travel, Participant/Trainee, or Other Direct Costs**) the **Line Item Details** screen does not appear when you click either the **Edit** or **Details** link next to specific line items, blocked pop-ups is most likely the problem.

Initial Budget screen Access – Budget Set up requirements.

Budget Set Up
✓ Personnel
Adjust Periods
✓ Proposal Rates

The first time you navigate to the Budget, you will be prompted to start a new budget, and then you will be presented with the **Budget Setup: Personnel** screen. You may be prompted to **Sync Budget Persons**: select and save an Appointment Type and accept or enter the Job Code required for budget calculations. This is usually the case with Rolodex persons, but can also occur for other personnel.

Prompt for Rolodex persons or personnel with incomplete data in Coeus.

Investigator: Hanlon, Rosemary
 Agency/Sponsor: 000500 : NSF
 Title: Sample for screen shots

Proposal #: 00003592 (In Progress)
 Proposal Period: 01/01/2009 - 12/31/2011

Sync Budget Persons

Please select Appointment Type and Jobcode for following persons

Name	Appointment Type	Job Code
Seuss, Doctor,	REG EMPLOYEE	SL017

Coeus-recommends an Appointment Type and Job Code; either Save or select and enter alternate data.

The personnel already added on the **Investigators/Key Persons** screen (PI, Co-I(s), and Key Study Person(s)) will automatically populate some of the data fields required on this screen from Person Data information fed to Coeus.

Budget Periods
Personnel Budget
Equipment
Travel
Participant/Trainee
Other Direct Costs

Personnel listed on this Budget Set Up Personnel screen will be available to add to the **Personnel Budget**. You must add your personnel to the set up screen in order to create the “pick-list” of all personnel to be added to your budgeted costs, though not all the persons on the table need be in *any* of the budget periods.

Once the Set Up is complete, enter Period 1 expenses, and then **generate all periods**. Once all the proposal periods have been generated, individual tabs will appear for each proposal period. You can then click on each tab and then navigate through the budget category screens to make adjustments relevant to that period.

12. Budget Setup

Budget Set Up Personnel

A. Add and complete Budget Personnel entries

1. **Navigate** to **Personnel** entry screen
2. **Search** for and **Add** the proposal personnel needed for your project budget. (Research staff, Support staff, Postdoctoral Associates, Graduate Students, or To-Be Announced staff, etc.):

-**Add Employee** Employee Search will locate persons maintained in Coeus from the UC HR system.

-**Add Non Employee** Non Employee Search will locate persons maintained in the Coeus Rolodex.

-**Add TBA** Add TBA Search will locate a predefined list of to-be-announced persons by job title. (i.e. Project Manager, Graduate Student, etc.)



Only the names of the PI, Co-I and Key Persons will be printed on the Grants.gov RR Budget (detail) forms. Refer to your sponsor guidelines for specific definitions of Key Personnel.

Budget Persons populated from Investigator/Key Persons:

Budget Personnel						
Name	Job Code	Appointment Type	Eff Date	Base Salary	Anniv Date	Base Salary by Period
Carole H Donnellon	011367	12M EMPLOYEE	07/20/2013	\$0.00		Remove Base Salary by Period
Ketaki Ashutosh Mhaisekar	007337	12M EMPLOYEE	07/20/2013	\$0.00		Remove Base Salary by Period
Add Employee Add Non Employee Add TBA Calculate All Base Sal						
<input type="button" value="Save"/>						

- **Select [Add Employee](#)** to search the HR database or select **[Add Non Employee](#)** to search the Rolodex.

• Please enter search criteria of the form `^value*` or `^value or value*` in any of search fields.

Last Name: <input type="text"/>	First Name: <input type="text"/>
Full Name: <input type="text"/>	User Name: <input type="text"/>
Email: <input type="text"/>	Department Number: <input type="text"/>
Unit Name: <input type="text"/>	School: <input type="text"/>
Directory Title: <input type="text"/>	Office Location: <input type="text"/>
Office Phone: <input type="text"/>	
<input type="button" value="Search"/> <input type="button" value="Cancel"/>	

- **Search** for the employee by entering data into the fields on the search screen.
 - Entering *Last Name* and *First Name* is usually sufficient, use other fields to help narrow down searches.
 - Use the asterisk (*) before and after data in fields to widen searches and minimize typed entries.
- **Select** search to display the search results.

Person Search Result								
							Search Again	Close Window
FULL_NAME	PRIOR_NAME	USER_NAME	HOME_UNIT	SCHOOL	EMAIL_ADDRESS	DIRECTORY_TITLE	OFFICE_LOC	
Alicia F Jones		JONA0	60000421		JONA0@EMAIL.UC.EDU		38	
Alicia L. Jones		JONESA4	60000677		ALICIA.JONES@UC.EDU	Financial Analyst Sr	0637	
Amanda A. Jones	Robertson	ROBERAB	60000880		AMANDA.ROBERTSON@UC.EDU		0559	
Angela J Jones		JONA8	60001600		JONA8@EMAIL.UC.EDU		0193	
Ashley Jones		JONES2AA	60001412		JONES2AA@MAIL.UC.EDU		0033	
Benjamin A Jones		JONEBJ	60000945		BENJAMIN.JONES@UC.EDU	Air Quality Tech 2	0580	
Bianca Jones		JONEB9	60000567		JONEB9@EMAIL.UC.EDU		0091	
Blaise Jones		JONEBJ	60000390		BLAISE.JONES@UC.EDU	Professor	0054	

- **Select** the appropriate person displayed in the **Person Search Results** screen. Take time to scroll across the entire window to be sure you've selected the correct person – some individuals may appear more than once and some names are similar.

Add TBA:

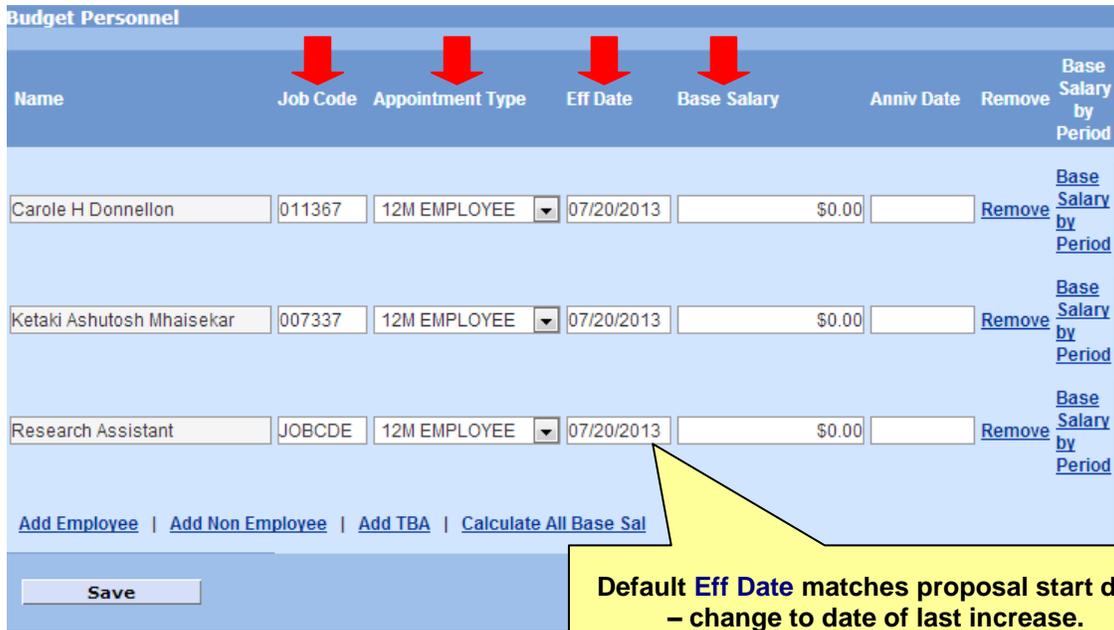
- To add unnamed personnel (personnel that will be staffed but for whom you have not yet hired or assigned):
 - **Select** [Add TBA](#)
 - **Select** on the appropriate category displayed in the **TBA Persons** window.
 - **Save**

TBA Persons		
TBA Id	Name	Job Code
1	Faculty	
2	Part-time Faculty	
3	Post Doc	
4	Research Associate	
5	Research Assistant	
6	Graduate Assistant	
7	Undergraduate Student	
8	Co-op Student	
9	Administrative Assistant	

Result of Add TBA selection:

Budget Personnel						
Name	Job Code	Appointment Type	Eff Date	Base Salary	Remove	
<input type="text" value="Steven S. Manning"/>	<input type="text" value="004599"/>	REG EMPLOYEE	<input type="text" value="07/01/2011"/>	<input type="text" value="\$0.00"/>	Remove	
<input type="text" value="Ketaki Ashutosh Mhaisekar"/>	<input type="text" value="007337"/>	10M DURATION	<input type="text" value="07/01/2011"/>	<input type="text" value="\$0.00"/>	Remove	
<input type="text" value="Research Assistant"/>	<input type="text" value="JOBODE"/>	12M DURATION	<input type="text" value="07/01/2011"/>	<input type="text" value="\$0.00"/>	Remove	

[Add Employee](#) | [Add Non Employee](#) | [Add TBA](#)



Budget Personnel

Name	Job Code	Appointment Type	Eff Date	Base Salary	Anniv Date	Remove	Base Salary by Period
Carole H Donnellon	011367	12M EMPLOYEE	07/20/2013	\$0.00		Remove	Base Salary by Period
Ketaki Ashutosh Mhaisekar	007337	12M EMPLOYEE	07/20/2013	\$0.00		Remove	Base Salary by Period
Research Assistant	JOBDCDE	12M EMPLOYEE	07/20/2013	\$0.00		Remove	Base Salary by Period

[Add Employee](#) | [Add Non Employee](#) | [Add TBA](#) | [Calculate All Base Sal](#)

Save

Default Eff Date matches proposal start date – change to date of last increase.

- **Job Code:** This field is a required field populated by the HR data feed or Coeus. This data field is used to help distinguish one line item from another.
- **Appointment Type:** Will be populated by the HR data feed. Review that this information is correct, as it is part of the calculation that charges salary to the budget. If you need to make a change, select the appropriate appointment type from the dropdown list.
 - **12M EMPLOYEE** refers to a Regular Employee with a 12-month salary base.
 - **TWO SEMESTER FACULTY** refers to faculty with 9-month salary base.
 - **TMP EMPLOYEE** refers to a Temporary Appointment, use with a Monthly base salary level.



Coeus calculates Faculty salaries (including summer months) based on their 9-month academic appointment. Changing the Appointment type can impact your budget if you mismatch Appointment Type and Base Salary. Also, the Effective Date of the salary directly impacts when Coeus will inflate that salary in your budget.

3. **Enter Eff Date:** The Effective Date displayed automatically defaults to the start date of the proposal period. For Coeus to generate the most precise salary inflation, change the Effective Date to match the date of that employee’s last increase.
4. **Enter Base Salary:** Enter the person’s full current annual salary – *as it relates to the length of appointment entered*. The value should be as of the date of the last known salary increase. Do not use commas.
5. **Anniv Date:** Please contact coeus@uc.edu before using this field.
6. Use the **Calculate All Base Sal** (salary) tool. This feature controls the Base Salary values that appear on the RR Budget form used in Grants.gov submissions.



- Click on **Calculate All Base Sal**
- Click on **Base Salary by Period** next to the Budget Person to view the calculated salaries. (The number of salary fields generated relates to the number of the proposal budget periods; but no more than 10 will ever be generated as that is the current Grants.gov form limit.)

Base Salary by Period	
Period	Base Salary
1	\$120,000.00
2	\$123,600.00
3	\$127,308.00
4	\$131,127.24
5	\$135,061.06

Save Calculate Close

- Adjust the salaries, as needed. (The percentage inflated is centrally maintained for all salaries.)
- These base salary values may be manually entered, if desired.

If NO Base Salaries are entered, the RR Budget form Base Salary field will be \$0.00 - the field is not required.

7. **Save** the proposal personnel once you have entered all personnel who will be part of your budget.

Save



Not all personnel listed in the Set Up Personnel panel need to be applied as an expense line in your budget. PI's Co-I's, and Key Personnel will automatically be maintained to the Budget Person table, but you can leave any salary detail line blank if you will not use the individual in the budget.

B. Adjust Periods (boundaries)

Adjust Periods

The default budget periods are displayed on this screen. Coeus will automatically try to create 12-month budget periods based on the dates entered as Start and End dates on the **General Info** screen of the proposal. Refer to your sponsor announcement for specific guidance on required budget period lengths.

To **change** the periods, enter the revised dates or select dates using the calendar tool .

To **add** another period, click [Add Period](#) (located below the period line items), and enter the start and end dates.

To **remove** a period, click [Remove](#) (to the right of each period line item displayed).

Once you have made the necessary changes, select **Save**.

Save

Adjust Period Boundaries

Period	* Start Date	* End Date	
1	<input type="text" value="01/01/2009"/> 	<input type="text" value="12/31/2009"/> 	Remove
2	<input type="text" value="01/01/2010"/> 	<input type="text" value="12/31/2010"/> 	Remove
3	<input type="text" value="01/01/2011"/> 	<input type="text" value="12/31/2011"/> 	Remove

[Add Period](#)

Save



When copying a proposal with Start and End dates that do not match your new submission, be sure to adjust the Start and End dates on the **General Info** screen *first*. Then make the necessary changes for your new proposal on the **Adjust Periods** screen.

Remember to Sync your Rates! (Navigate to the Rates screen). And remember to review & update salaries and their effective dates! (Navigate to Budget Set Up: Personnel)

Period 1		No. of Months : 12.0						
Direct Cost : \$0.00	Indirect Cost : \$0.00	Total Cost : \$0.00						
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 06/01/2010 - 05/31/2011						
Personnel Budget								
Budget Totals								
Direct Cost : \$431,141.54	Indirect Cost : \$0.00	Total Cost : \$431,141.54						
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 06/01/2010 - 05/31/2013						
Budget Periods								
Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	06/01/2010	05/31/2011	12.0	\$140,168.67	\$0.00	\$0.00	\$0.00	\$140,168.67
2	06/01/2011	05/31/2012	12.0	\$143,513.73	\$0.00	\$0.00	\$0.00	\$143,513.73
3	06/01/2012	05/31/2013	12.0	\$147,459.14	\$0.00	\$0.00	\$0.00	\$147,459.14

No. of Months (in budget period): This column displays the number of months in the project period. This indicator appears on the Budget Summary screen and in each Period tab header.

Budget Periods									
Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost	
1	01/01/2011	06/30/2011	6.0	\$50,000.00	\$34,000.00	\$0.00	\$0.00	\$84,000.00	
2	07/01/2011	12/31/2012	18.0	\$51,500.00	\$35,020.00	\$0.00	\$0.00	\$86,520.00	
3	01/01/2013	12/31/2013	12.0	\$53,045.00	\$36,070.60	\$0.00	\$0.00	\$89,115.60	

Investigator: Hanlon, Rosemary
Agency/Sponsor: 000500 : NSF
Title: Toad the wet sprocket
Proposal #: 00000365 (In Progress)
Proposal Period: 01/01/2011 - 12/31/2013
Version: 1

Period **Period 2** Period 3

Direct Cost : \$51,500.00 **Indirect Cost :** \$35,020.00 **Total Cost :** \$86,520.00 **No. of Months :** 18.0
Under Recovery : \$0.00 **Cost Share :** \$0.00 **Period :** 07/01/2011 - 12/31/2012

It is advised to generate these unusual budget periods **before** applying certain budget expense details. While this means additional steps to manually populate the expenses in each budget period, it is necessary for accurate personnel effort and other budgeting decisions that should be made by the user. If you choose to add personnel detail prior to generating budget periods, you must still review each Personnel Budget Detail window for each budget person to verify and/or modify.

For Personnel expenses:

- Use the standard instructions to select cost elements and maintain the budget person details as detailed in this guide.
- Be especially mindful to define the **Start Date** and **End Date** for each person as it relates to *this* budget period.
- You may need to use the **Add Person** option several times for each person to expense them to Academic or Summer periods if the budget period is especially long. The figure below describes an 18 month budget period: two (2) lines were needed to capture the Academic months.

Title: Toad the wet sprocket **Version:** 1

Period 1 **Period 2** Period 3

Direct Cost : \$157,784.46 **Indirect Cost :** \$107,293.43 **Total Cost :** \$265,077.89 **No. of Months :** 18.0
Under Recovery : \$0.00 **Cost Share :** \$0.00 **Period :** 07/01/2011 - 12/31/2012

Personnel Budget

Name: Seuss, Doctor Period: Academic Start Date: 09/01/2011 End Date: 05/31/2012 Months: 9.0 Requested Salary(\$): \$0.00 Fringe Benefit(\$): \$0.00 Funds Requested(\$): \$0.00	Salary Type: Faculty Salaries Tenured - On %Charged: 100.00 %Effort: 100.00	Edit Remove
Name: Seuss, Doctor Period: Academic Start Date: 09/01/2012 End Date: 12/31/2012 Months: 4.0 Requested Salary(\$): \$0.00 Fringe Benefit(\$): \$0.00 Funds Requested(\$): \$0.00	Salary Type: Faculty Salaries Tenured - On %Charged: 100.00 %Effort: 100.00	Edit Remove
Name: Seuss, Doctor Period: Academic Start Date: 07/01/2011 End Date: 12/31/2012 Months: 0.0 Requested Salary(\$): \$0.00 Fringe Benefit(\$): \$0.00 Funds Requested(\$): \$0.00	Salary Type: %Charged: 0.00 %Effort: 0.00	Edit Remove

Note the default Start Date & End Date span the full 18 months of this project period 2.

For Non-Personnel Expenses:

You can enter non-personnel line item expenses prior to generating budget periods. Costs will be inflated once per generated budget period (if the “apply inflation” box is checked). The inflation may be appropriate to budgets with greater than 12 month periods, but not for periods less than 12-month– like quarterly (3 month) budgets. Therefore, it is advised to review the costs generated in each budget period for appropriateness and make any necessary changes. It may be best to manually add these line items and expenses to each budget period.

Line Item Details				
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close
Description: <input type="text"/>				
Start Date:	<input type="text" value="07/01/2010"/>	End Date:	<input type="text" value="06/30/2011"/>	Quantity: <input type="text" value="0.00"/>
Cost:	<input type="text" value="\$2,000.00"/>	Cost Sharing:	<input type="text" value="\$0.00"/>	Underrecovery: <input type="text" value="\$0.00"/>
Apply Inflation:	<input checked="" type="checkbox"/>	On Campus:	<input checked="" type="checkbox"/>	Submit Cost Sharing: <input checked="" type="checkbox"/>
Rates Applicable to the Line Item				
Rate Types	Apply	Cost	Cost Sharing	
MTDC	<input checked="" type="checkbox"/>	\$1,380.00	\$0.00	
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close

C. Proposal Rates

Proposal Rates

The **Proposal Rates** screen lists the F&A, Fringe Benefit, and Inflation rates that will be applied to your budgeted costs.

Activity Type: Research
F and A

Rate Type	On Off Campus	Project Year	Start Date	Institute Rate	Applicable Rate
MTDC	Off	2014	07/01/2013	26.0	26.0
MTDC	On	2014	07/01/2013	58.5	58.5
		2015		26.0	

Fringe Benefits

Rate Type	On Off Campus	Project Year	Start Date	Institute Rate	Applicable Rate
Faculty Full Time (Federal)	Off	2014	07/01/2013	33.2	33.2
Faculty Full Time (Federal)	On	2014	07/01/2013	33.2	33.2
		2015		33.7	

Inflation

Rate Type	On Off Campus	Project Year	Start Date	Institute Rate	Applicable Rate
Faculty Salaries	Off	2013	09/01/2012	2.0	2.0
Faculty Salaries	On	2013	09/01/2012	2.0	2.0
		2014		2.0	
Students	Off	2017	07/01/2016	2.0	2.0
Students	On	2017	07/01/2016	2.0	2.0

Reset **Sync** **Save**

Rates are maintained centrally by SRS, but rates to be applied to *this* proposal can be entered on this rates screen.



If you have opened or copied an older proposal or revised the start and end date of the proposal, select **Sync** at the bottom of the screen to update your proposal with the appropriate UC rates effective for your budget periods, and then **Save**.

If you make a mistake or change your mind, you can click **Reset** at the bottom of the screen to revert back to the Institute rates, and then **Save**.

To modify the applicable rates for this proposal:

1. Open the **Proposal Rates** screen.
2. Scroll down to the appropriate category of the screen and enter the percent rate to be used for this proposal in the **Applicable Rate** fields to the right of the **Rate Type** listed. Enter the rate in each **Fiscal Year** and for both **On and Off Campus** line item of this category, as needed.

Example: Review/Modify Faculty Inflation

Inflation					
Rate Type	On Off Campus	Project Year	Start Date	Institute Rate	Applicable Rate
Faculty Salaries	Off	2013	09/01/2012	2.0	<input type="text" value="2.0"/>
Faculty Salaries	On	2013	09/01/2012	2.0	<input type="text" value="2.0"/>
Faculty Salaries	Off	2014	09/01/2013	2.0	<input type="text" value="2.0"/>
Faculty Salaries	On	2014	09/01/2013	2.0	<input type="text" value="2.0"/>
Faculty Salaries	Off	2015	09/01/2014	2.0	<input type="text" value="2.0"/>
Faculty Salaries	On	2015	09/01/2014	2.0	<input type="text" value="2.0"/>

Enter inflation value to be applied to Faculty Salaries for this proposal.

3. When you have adjusted the necessary rates, scroll down to the bottom of the screen and select **Save**.

Save

D. Navigate to Personnel Budget

Personnel Budget

When first opened, the **Personnel Budget** screen displays a tab for Period 1.

Period 1

Direct Cost : \$0.00 Indirect Cost : \$0.00 Total Cost : \$0.00
 Under Recovery : \$0.00 Cost Share : \$0.00 Period : 01/01/2009 - 12/31/2009

Personnel Budget
[Add Person](#) | [Calculate](#)

Save

Personnel Costs - Line Items entered in Coeus Premium (View-only)

Salary Type	Start Date	End Date	Fringe Benefit(\$)	Funds Requested(\$)
Total Funds Requested(\$)				\$0.00

1. Select **Add Person** to add the **personnel** to be included in the budget from the pick-list of personnel previously added in the **Budget Set Up > Personnel** screen.
 - Select the checkboxes to the left of the names of all the personnel required for the Period 1 budget. You can also select the single checkbox at the top of the list to Select All.

Click here to select all, or check individually.

<input type="checkbox"/>	Name	Job Code	Appointment Type
<input type="checkbox"/>	Ketaki Ashutosh Mhaisekar	007337	12M EMPLOYEE
<input type="checkbox"/>	Carole H Donnellon	011367	12M EMPLOYEE
<input type="checkbox"/>	Research Assistant	JOBCE	12M EMPLOYEE

Save

- Select **Save**.



You do not need to use all the **Budget Personnel** displayed. If they are not selected in the Add Person process, they will have no impact on your budget. You may need to maintain persons on this list that will not be included in your budget because of the Sync Budget Person prompt during set up.

Result: all the personnel selected will now be displayed on the **Personnel Budget** screen.

Period 1 displays at initial budget entry. Other periods will be generated later.

Customize each person.

Start date defaults to Project Start date. End date defaults to Project End date. Revise these dates as appropriate to impact the calculated effort and requested funds.

Direct Cost:\$0.00	Indirect Cost:\$0.00	Total Cost:\$0.00	No. of Months:12.0
Under Recovery:\$0.00	Cost Share:\$0.00	Period:07/20/2013 - 07/19/2014	

Personnel Budget

Name: Ketaki Ashutosh Mhaisekar	Salary Type: [Dropdown]	Edit Remove
Period: Academic	%Charged: 0.00	%Effort: 0.00
Start Date: 07/20/2013	End Date: 07/19/2014	Months: 0.0
Requested Salary(\$): \$0.00	Fringe Benefit(\$): \$0.00	Funds Requested(\$): \$0.00

Name: Carole H Donnellon	Salary Type: [Dropdown]	Edit Remove
Period: Academic	%Charged: 0.00	%Effort: 0.00
Start Date: 07/20/2013	End Date: 07/19/2014	Months: 0.0
Requested Salary(\$): \$0.00	Fringe Benefit(\$): \$0.00	Funds Requested(\$): \$0.00

Name: Research Assistant	Salary Type: [Dropdown]	Edit Remove
Period: Academic	%Charged: 0.00	%Effort: 0.00
Start Date: 07/20/2013	End Date: 07/19/2014	Months: 0.0
Requested Salary(\$): \$0.00	Fringe Benefit(\$): \$0.00	Funds Requested(\$): \$0.00

Select **Add Person** to insert more Persons.

Select **Calculate** to see how entries impact budget.

Select **Save** to calculate and save customized entries.

Any Premium-only personnel items will display below this line.*

Personnel Costs - Line Items entered in Coeus Premium (View-only)				
Salary Type	Start Date	End Date	Fringe Benefit(\$)	Funds Requested(\$)
Total Funds Requested(\$)				\$0.00

Subtotal of all personnel expenses.

* Premium allows users to enter personnel expense on a line item without selecting a Budget Person (Add Person). Please contact coeus@uc.edu if you see personnel line items displayed in this manner.

2. Customize each Personnel Line Item:

Name	Seuss, Doctor,	Salary Type		Edit Remove	
Period	Academic	%Charged	0.00	%Effort	0.00
Start Date:	01/01/2009	End Date:	12/31/2009	Months	0.0
Requested Salary(\$)	\$0.00	Fringe Benefit(\$)	\$0.00	Funds Requested(\$)	\$0.00

- **Select** the appropriate **Salary Type** from the drop-down menu. See your department Business Administrator (BA) if you need help matching a salary type to personnel.
- **Select** the appropriate **Period** from the drop-down menu:
 - **Academic:** The 9-month academic year.
 - **Calendar:** The 12-month calendar year.
 - **Summer:** The 3 months not covered by the Academic period.



The **Period** selected should correlate with the number of months in the **Appointment Type** selected on the **Set Up > Personnel Screen**. Mismatched Periods to Types can impact budget calculations.

- **Enter % Charged** and **% Effort**.
 - Equal amounts mean the entire expense will be paid by the sponsor.
 - **% Charged** is less than **% Effort**, will generate cost sharing (expense that will not be paid by the sponsor).
- **Edit** the **Start Date** and or **End Date** to either correctly reflect Faculty Summer Month effort, or remove eligible vacation time, or accurately reflect time spent on the project, as needed.
- **Select Save** when all added customized entries have been made. **Save**
- **Select Calculate** (located below all of the personnel entries) if you want to see how a changed entry impacts the budget.

Name	Seuss, Doctor	Salary Type	Research Staff - On	Edit Remove	
Period	Calendar	%Charged	25.00	%Effort	25.00
Start Date:	07/15/2010	End Date:	06/30/2011	Months	2.875
Requested Salary(\$)	\$24,434.14	Fringe Benefit(\$)	\$10,482.24	Funds Requested(\$)	\$34,916.38

- **Select Remove** to delete the person entered.
- **Select Edit** to open the Line Item Details window for that personnel entry.

3. Enter Personnel Line Item Details

Name	Ketaki Ashutosh Mhaisekar	Salary Type	Ex Staff FT - Federal Fringe Rates	Edit Remove	
Period	Calendar	%Charged	5.00	%Effort	5.00
Start Date	07/20/2013	End Date	07/19/2014	Months	0.625
Requested Salary(\$)	\$5,005.11	Fringe Benefit(\$)	\$2,049.02	Funds Requested(\$)	\$7,054.13

- Select **Edit** to the right of each line item to display the **Line Item Details** window.
(This link is labeled **Details** if the budget is marked **complete** or if you are authorized to **view only**.)

Personnel Line Item Details window:



Reminder! Your browser software must be set to Allow Pop-ups to view this window

Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close	
Name	Ketaki Ashutosh Mhaisekar				
Project Role	Undefined	Undefined			
Description:					
Start Date	07/20/2013	End Date	07/19/2014		
Cost:	\$5,005.11	Cost Sharing:	\$0.00	Underrecor...: \$0.00	
Apply Inflation:	<input checked="" type="checkbox"/>	On Campus:	<input checked="" type="checkbox"/>	Submit Cost Sharing:	<input checked="" type="checkbox"/>
Rates Applicable to the Line Item					
Rate Types	Apply	Cost	Cost Sharing		
MTDC	<input checked="" type="checkbox"/>	\$4,126.66	\$0.00		
Exempt Staff (Federal)	<input checked="" type="checkbox"/>	\$2,049.02	\$0.00		
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close	

Impacts S2S forms population

The following items on the **Line Item Details** window can be modified:

- **On Campus** checkbox Defaults to checked; uncheck to apply off-campus overhead and fringe rates.
- **Submit Cost Sharing** checkbox Defaults to checked; uncheck to exclude this line item's calculated cost share expense from the Grants.gov system-to-system forms (SF 424 RR, Fed/Non-Fed Budgets).
- **Rate Types / Apply:** Select and deselect the **Apply** checkboxes as needed.

The gray text fields on the Line Item Details window are read only in Lite. Edits and changes to Personnel entries must be made directly in the Personnel Budget screen, not in Line Item Details :



Save & Apply to Current and Later periods should only be used when adding a new personnel expense line in a budget with all periods generated. This feature does not update previously generated personnel line items. If this feature is used with an existing person, an additional line item appearance will be generated in the later periods.

- **Save and Apply to Current Period**
 - Use this feature to save the checkbox selections made in this period
- **Save and Apply to Current and Later Period**
 - Use this feature to save and apply this line item to the current and all later periods in a generated budget. Use only for ADDING a new person to a generated budget.
- **Close**

E. Navigate to the Equipment Screen

Equipment

Please refer to your sponsor guidelines, specific opportunity instructions, and UC Policy and Procedures for budgeting equipment items.

Period 1

Period Totals			
Direct Cost : \$95,281.84	Indirect Cost : \$65,744.47	Total Cost : \$161,026.31	No. of Months : 12.0
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2010 - 06/30/2011	

Budget Equipment - List items and dollar amount for each item exceeding \$5000

Type	Description	Funds Requested (\$)		
-----Please Select-----		\$0.00	Edit	Remove
Total Equipment		\$0.00		

[Add Equipment](#) | [Calculate](#)

Save

1. Select [Add Equipment](#) to add individual items of equipment to the budget.

- Select a **Type** from the drop-down menu. NOTE: UC has only one option:
 - Equipment, Capital – value over \$5,000
- Enter a **Description**. Descriptions entered in the budget line items WILL print on Grants.gov Detailed budget forms. Current Grants.gov equipment budgeting requires a single line item for each equipment item and a description for each Equipment item.
- Enter a cost in the **Funds Requested (\$)** field (must be greater than \$5,000) – **do not use commas**.
- Select [Calculate](#) to see how this item impacts budget totals. (Coeus will calculate automatically upon Save.)
- Select [Remove](#) to delete the entry.

If there are no edits select: [Close](#)

- Select **Save** to save your entered budget item.

Save

Budget Equipment - List items and dollar amount for each item exceeding \$5000

Type	Description	Funds Requested (\$)		
Equipment, Capital – value over \$5000	Big Widget	\$7,500.00	Edit	Remove
Total Equipment		\$7,500.00		

[Add Equipment](#) | [Calculate](#)

Save

2. Enter Equipment **Line Item Details**

- **Select Edit** to the right of each line item to display the **Line Item Details** window where you can enter more detailed information about each line item.

Line Item Details					
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close	
Description:	Big Widget				
Start Date:	07/01/2010	End Date:	06/30/2011	Quantity:	0.00
Cost:	\$7,500.00	Cost Sharing:	\$0.00	Underrecovery:	\$0.00
Apply Inflation:	<input checked="" type="checkbox"/>	On Campus:	<input checked="" type="checkbox"/>	Submit Cost Sharing:	<input checked="" type="checkbox"/>
Rates Applicable to the Line Item					
Rate Types	Apply	Cost	Cost Sharing		
Calculated Amounts are not available					
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close	

The following fields can be modified on the **Line Item Details** window:

- **Description:** Change the line item description as needed.
- **Start Date** and **End Date:** Change if relevant or required based on the sponsor instructions.
- **Quantity:** This field can be left blank, since it is for your records only. This value does not affect the line item. That is, the cost is not multiplied by the quantity to calculate the total cost of the line item.
- **Cost:** Change as needed. You will see the updated amount back on the main **Equipment** screen.
- **Cost Sharing:** Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your Department BA or your [SRS GA](#) and comply with UC guidelines for off-campus project eligibility.
- **Submit Cost Sharing** checkbox: Deselect this option to keep the cost share expense for this line item from being included on the Grants.gov S2S forms.
- **Rate Types / Apply:** Select and deselect the **Apply** checkboxes as needed (Note: Equipment is exempt from F&A, thus no calculated amounts are available to view.)

The following calculated costs can be viewed on the **Line Item Details** window:

- **Rates applicable to the Line item.** (Note: Equipment is exempt from F&A.)

If you've made any edits, select:

- [Save and Apply to Current Period](#)
- [Save and Apply to Current and Later Periods](#), as relevant to your proposal

If there are no edits select: [Close](#)

You can add more items and make further changes to the entries on the **Equipment** screen as needed.

F. Navigate to the Travel screen

Travel

Please refer to your sponsor guidelines, specific opportunity instructions, and UC Policy and Procedures for budgeting Travel items.

1. Select **Add Travel** to add all of the travel costs to be included in the budget.

- Select a **Type** from the drop-down menu.
 - Travel budget options include:
 - Travel – Foreign
 - Travel – domestic
- Enter a **Description**. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.
- Enter a cost in the **Funds Requested (\$)** field – **do not use commas**.
- Select **Calculate** to see how this item impacts budget totals. (Coeus will calculate automatically upon Save.)
- Select **Remove** to delete the entry.
- Select **Save** to save your entered budget item. Save

Period 1

Period Totals

Direct Cost : \$102,781.84	Indirect Cost : \$65,744.47	Total Cost : \$168,526.31	No. of Months : 12.0
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2010 - 06/30/2011	

Budget Travel - Domestic Travel Costs (Incl. Canada, Mexico and U.S. Possessions) & Foreign Travel Costs

Type	Description	Funds Requested (\$)	
-----Please Select-----		\$0.00	Edit Remove
Total Travel Cost		\$0.00	

[Add Travel](#) | [Calculate](#)

Save

Results after entry:

Budget Travel - Domestic Travel Costs (Incl. Canada, Mexico and U.S. Possessions) & Foreign Travel Costs

Type	Description	Funds Requested (\$)	
Travel - domestic	Meeting - PI attendance required	\$1,000.00	Edit Remove
Travel - Foreign	Conference - Ireland	\$8,500.00	Edit Remove
Total Travel Cost		\$9,500.00	

[Add Travel](#) | [Calculate](#)

2. Enter Travel **Line Item Details**

- **Select Edit** to the right of each line item to display the **Line Item Details** window where you can enter more detailed information about each line item.

Line Item Details				
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close
Description: Domestic meeting: PI attendance required				
Start Date:	07/01/2010	End Date:	06/30/2011	Quantity: 0.00
Cost:	\$1,850.00	Cost Sharing:	\$0.00	Underrecovery: \$0.00
Apply Inflation:	<input checked="" type="checkbox"/>	On Campus:	<input checked="" type="checkbox"/>	Submit Cost Sharing: <input checked="" type="checkbox"/>
Rates Applicable to the Line Item				
Rate Types	Apply	Cost	Cost Sharing	
Calculated Amounts are not available				
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close

The following fields can be modified on the **Line Item Details** window:

- **Description:** Change the line item description as needed.
- **Start Date** and **End Date:** Change if relevant or required based on the sponsor instructions.
- **Quantity:** This field can be left blank, since it is for your records only. This value does not affect the line item. That is, the cost is not multiplied by the quantity to calculate the total cost of the line item.
- **Cost:** Change as needed. You will see the updated amount back on the main **Travel** screen.
- **Cost Sharing:** Enter a value, if appropriate. Refer to Sponsor Guidelines and UC/department Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your Department BA or your [SRS GA](#) and comply with UC guidelines for off-campus project eligibility.
- **Submit Cost Sharing** checkbox: Deselect this option to keep the cost share expense for this line item from being included on the Grants.gov S2S forms.
- **Rate Types / Apply:** Select and deselect the **Apply** checkboxes as needed.

The following calculated costs can be viewed on the **Line Item Details** window:

- **Rates applicable to the Line item.** Cost and Cost Sharing amounts.

If you've made any edits, select:

- [Save and Apply to Current Period](#)
- [Save and Apply to Current and Later Periods](#), if you wish to add this line item to later periods in a generated budget.

If there are no edits select: [Close](#)

You can add more items and make further changes to the entries on the **Travel** screen as needed.



G. Navigate to the Participant/Trainee screen

Participant/Trainee

Please refer to your sponsor guidelines, specific opportunity instructions, and UC Policy and Procedures for budgeting Participant/Trainee expenses – not allowable expense on some funding mechanisms!

1. Select **Add Participant/Trainee** to add all of these costs to be included in the budget.
 - Select a **Type** from the drop-down menu.
 - Participant/Trainee budget options include:
 - Resident Trainee Stipends
 - Travel - Trainee
 - Enter a **Description**. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.
 - Enter a cost in the **Funds Requested (\$)** field – **do not use commas**.
 - Select **Calculate** to see how this item impacts budget totals. (Coeus will calculate automatically upon Save.)
 - Select **Remove** to delete the entry.
 - Select **Save** to save your entered budget item.

Period 1

Period Totals

Direct Cost : \$104,631.84	Indirect Cost : \$65,744.47	Total Cost : \$170,376.31	No. of Months : 12.0
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2010 - 06/30/2011	

Budget Participant / Trainee

Type	Description	Qty	Funds Requested (\$)	
-----Please Select-----	<input style="width: 90%;" type="text"/>	<input style="width: 50%;" type="text" value="0.00"/>	<input style="width: 50%;" type="text" value="\$0.00"/>	Edit Remove
Total Participant/Trainee Support Costs			\$0.00	

[Add Participant/Trainee](#) | [Calculate](#)

Results after entry:

Budget Participant / Trainee

Type	Description	Qty	Funds Requested (\$)	
Resident Trainee Stipends	10 trainees, 2 months each	10.00	\$40,000.00	Edit Remove
Travel - Trainee	Travel for 3 trainees	3.00	\$100.00	Edit Remove
Total Participant/Trainee Support Costs			\$10,100.00	

[Add Participant/Trainee](#) | [Calculate](#)

2. Enter Participant/Trainee **Line Item Details**

- **Select Edit** to the right of each line item to display the **Line Item Details** window where you can enter more detailed information about each line item.

Line Item Details			
Save and Apply to Current Period		Save and Apply to Current and Later Periods	
Close			
Description:	10 trainees, 2 months each		
Start Date:	03/01/2011	End Date:	02/29/2012
Quantity:	10.00		
Cost:	\$40,000.00	Cost Sharing:	\$0.00
Underrecovery:	\$0.00		
Apply Inflation:	<input checked="" type="checkbox"/>	On Campus:	<input checked="" type="checkbox"/>
Submit Cost Sharing:	<input checked="" type="checkbox"/>		
Rates Applicable to the Line Item			
Rate Types	Apply	Cost	Cost Sharing
MTDC	<input type="checkbox"/>	\$22,800.00	\$0.00
Save and Apply to Current Period		Save and Apply to Current and Later Periods	
Close			

The following fields can be modified on the **Line Item Details** window:

- **Description:** Change the line item description as needed.
- **Start Date** and **End Date:** Change if relevant or required based on the sponsor instructions.
- **Quantity:** This field can be left blank, since it is for your records only. This value does not affect the line item. That is, the cost is not multiplied by the quantity to calculate the total cost of the line item.
- **Cost:** Change as needed. You will see the changes on the main **Participant/Trainee** screen.
- **Cost Sharing:** Enter a value, if appropriate. Refer to Sponsor Guidelines and Department/UC Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your Department BA or your [SRS Authorized ApproverGA](#) and comply with UC guidelines for off-campus project eligibility.
- **Submit Cost Sharing** checkbox: Deselect this option to keep the cost share expense for this line item from being included on the Grants.gov S2S forms.
- **Rate Types / Apply:** Select and deselect the **Apply** checkboxes as needed. (Note: Participant/Trainee expenses typically are exempt from F&A – check sponsor guidelines.)

The following calculated costs can be viewed on the **Line Item Details** window:

- **Rates applicable to the Line item.** Cost and Cost Sharing amounts. (Participant/Trainee expenses are exempt from F&A)

If you've made any edits, select:

- [Save and Apply to Current Period](#)
- [Save and Apply to Current and Later Periods](#), if you wish to add this line item to later periods in a generated budget.

If there are no edits select: [Close](#)

You can add more items and make further changes to the entries on the **Participant/Trainee** screen as needed.



H. Navigate to the Other Direct Costs screen

Other Direct Costs

1. Entering Costs Line Items in the Budget

Please refer to your sponsor guidelines, specific opportunity instructions, and UC Policy and Procedures for budgeting project expenses.

a. Select **Add Direct Costs** to add all of these costs to be included in the budget.

- Select a **Type** from the drop-down menu.



Please Note: a sample of cost types will be displayed for budgeting purposes – not the complete list from UC Flex – as sponsors do not require exquisite detail in proposal budgets. Many of these individual cost types will “roll up” to a Budget Category composite line displayed in the sponsor budget form.

- Enter a **Description**. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.
- Enter a cost in the **Funds Requested (\$)** field – **do not use commas**.
- Select **Calculate** to see how this item impacts budget totals. (Coeus will calculate automatically upon Save.)
- Select **Remove** to delete the entry.
- Select **Save** to save your entered budget item. Save

Period 1

Period Totals			
Direct Cost : \$144,631.84	Indirect Cost : \$65,744.47	Total Cost : \$210,376.31	No. of Months : 12.0
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2010 - 06/30/2011	

Budget Other Direct Costs			
Type	Description	Funds Requested (\$)	
-----Please Select-----		\$0.00	Edit Remove
Total Other Direct Costs		\$0.00	

[Add Direct Costs](#) | [Calculate](#)

Save

Results after entries:

Budget Other Direct Costs			
Type	Description	Funds Requested (\$)	
Printing	in-house publication supplies	\$2,500.00	Edit Remove
Materials and Services	server memory upgrade board	\$3,000.00	Edit Remove
Total Other Direct Costs		\$5,500.00	

[Add Direct Costs](#) | [Calculate](#)

Save

b. Enter Direct Cost **Line Item Details**

- **Select Edit** to the right of each line item to display the **Line Item Details** window where you can enter more detailed information about each line item.

Line Item Details				
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close
Description: server memory upgrade board				
Start Date:	07/01/2010	End Date:	06/30/2011	Quantity: 0.00
Cost:	\$3,000.00	Cost Sharing:	\$0.00	Underrecovery: \$0.00
Apply Inflation:	<input checked="" type="checkbox"/>	On Campus:	<input checked="" type="checkbox"/>	Submit Cost Sharing: <input checked="" type="checkbox"/>
Rates Applicable to the Line Item				
Rate Types	Apply	Cost	Cost Sharing	
MTDC	<input checked="" type="checkbox"/>	\$2,070.00	\$0.00	
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close

The following fields can be modified on the **Line Item Details** window:

- **Description:** Change the line item description as needed.
- **Start Date** and **End Date:** Change if relevant or required based on the sponsor instructions.
- **Quantity:** This field can be left blank, since it is for your records only. This value does not affect the line item. That is, the cost is not multiplied by the quantity to calculate the total cost of the line item.
- **Cost:** Change as needed. You will see the changes on the main **Other Direct Costs** screen.
- **Cost Sharing:** Enter a value, if appropriate. Refer to Sponsor Guidelines and UC Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your Department BA or your [SRS GA](#) and comply with UC guidelines for off-campus project eligibility.
- **Submit Cost Sharing** checkbox: Deselect this option to subtract the cost share expense for this line item from being included on the Grants.gov S2S forms.
- **Rate Types / Apply:** Select and deselect the **Apply** checkboxes as needed.

The following calculated costs can be viewed on the **Line Item Details** window:

- **Rates applicable to the Line item.** Cost and Cost Sharing amounts.

If you've made any edits, select:

- [Save and Apply to Current Period](#)
- [Save and Apply to Current and Later Periods](#), if you wish to add this line item to later periods in a generated budget.

If there are no edits select: [Close](#)

You can add more items and make further changes to the entries on the **Other Direct Costs** screen as needed.



2. a. New Subaward Budget Tool – automatic form translation and line item entry

NEW New in 4.5, a user-friendly process that reads the uploaded Adobe subaward form and inserts system-generated line items for subaward funding values for each project period into the proposal budget. Users may utilize the new Subaward Details window to manually type in the direct, indirect costs, and cost sharing for the Sub Award for each period OR upload a completed SubAward Budget Adobe form. Uploaded form data will automatically sync budget expenses to the detail window. For either manual or sync'd sub award details, the system will parse the data into the appropriate line items in each budget period, including determining first \$25K, F&A exempt of F&A, etc.



New Requirement: Generate All Periods BEFORE uploading the Sub Award file!

The proposal budget must be generated in order for the Sub Award Detail window to know how many budget periods to supply.

For every line item detailed subaward budget for your proposal:

1. Complete your other budget entries and generate all budget periods.
2. Navigate to **Sub Award Budget**

Investigator: Hanlon, Rosemary Proposal #: 00002462 (In Progress)
 Agency/Sponsor: 000340 : NIH Proposal Period: 10/01/2012 - 09/30/2017
 Title: 4.5.1 Proposal Development User Guide updates Version: 3

Sub Award budget

[Add Subaward](#)

3. Click **Add Subaward** to generate the entry fields
4. Enter the required information:
 - a. **Organization:** this can be a descriptive name of your subawardee. Use only letters, numbers, underscores or hyphens to avoid Grants.gov errors later.
 - b. **Description:** this will populate Coeus budget Description field for internal reference.

5. To Manually Enter Subaward Expenses:

- a. Click **Save**. The Organization will be added to the list of sub awards.

Sub Award budget

Organization Name:

Description:

File Name:

Sub Award budget		PDF	XML		
Organization Name	Form Name			Details	View Form
Western_University	None	✗	✗	View XML	Remove

- b. Click **Details** to open the Sub Award Budget Details window

Organization Name: Western_University

Period	Direct Cost	Indirect Cost	Cost Sharing	Total Cost
1	\$0.00	\$0.00	\$0.00	\$0.00
2	\$0.00	\$0.00	\$0.00	\$0.00
3	\$0.00	\$0.00	\$0.00	\$0.00
4	\$0.00	\$0.00	\$0.00	\$0.00
5	\$0.00	\$0.00	\$0.00	\$0.00

Save **Close**

- c. **Enter the Direct and Indirect Costs** for each budget period. The **Total Cost** will automatically sum from those entries.
- d. **Enter Cost Sharing**, if any, in the Cost Sharing column. Cost sharing entered here is for internal reference and will not populate on forms.

Organization Name: Western_University

Period	Direct Cost	Indirect Cost	Cost Sharing	Total Cost
1	\$50,000.00	\$25,000.00	\$0.00	\$75,000.00
2	\$50,000.00	\$25,000.00	\$0.00	\$75,000.00
3	\$50,000.00	\$25,000.00	\$0.00	\$75,000.00
4	\$50,000.00	\$25,000.00	\$0.00	\$75,000.00
5	\$50,000.00	\$25,000.00	\$0.00	\$75,000.00

Save **Close**

- e. Click **Save** to save the entries.
- f. Repeat these steps for additional sub awards.
- g. Navigate to **Other Direct Costs** to review the system-entered line items in each budget period.

Budget Other Direct Costs

Type	Description	Funds Requested (\$)		
Materials and Services		\$5,150.00	Edit	Remove
Subcontracts (Contracts) - Not MTDC	Western_University	\$50,000.00	Details	Remove
Subcontractors F&A - No F&A	Western_University	\$25,000.00	Details	Remove
Total Other Direct Costs		\$80,150.00		

[Add Direct Costs](#) | [Calculate](#)

- h. The sub award line item details may be viewed, but any edits must be completed in the new Sub Award entry window.

6. To Upload a Subaward Budget File for details to be extracted:

- a. Enter the Organization name and Description.
- b. Click **Browse** to locate the completed Adobe Subaward Budget XLS file to upload.



BEFORE YOU UPLOAD! Be certain that each subaward budget justification has a **unique name** with no spaces or special characters– these are the files uploaded in the PDF subaward form. Note: If everyone uses the same “budget_justification.pdf” name, your submission will **error** at Grants.gov!

K. * Budget Justification

(Only attach one file.)

- c. Click **Save**. The Organization will be added to the list of sub awards.
- d. Repeat the steps to maintain additional sub awards.
- e. Click **Details** to review the sub award.

Sub Award budget							
Add Subaward							
Organization Name	Form Name	PDF	XML				
+ Purdue-smallsub	RR Budget V1-1	✓	✓	Details	View Form	View XML	Remove
+ Jackson-tinysub	RR Budget V1-1	✓	✓	Details	View Form	View XML	Remove
+ Hopkins	RR Budget V1-1	✓	✓	Details	View Form	View XML	Remove
+ Princeton	RR Budget V1-1	✓	✓	Details	View Form	View XML	Remove

- If the Adobe subaward budget form was successfully translated, the values will be in the window.
- Use the **Sync XML** button to have the system extract the details from the budget file.

NOTE: the Start/End dates of the subaward file must be compatible with the prime budget to Sync

- **Cost Sharing** column is **user entered** – there are no values in the uploaded subaward budget to sync. Cost sharing referenced here is for internal reference and will not populate on forms

Sub Award Details - Windows Internet Explorer

https://coeus-cons.mit.edu/coeus/syncXMLSubAwardDetails.do

Organization Name: Princeton

Period	Direct Cost	Indirect Cost	Cost Sharing	Total Cost
1	\$250,000.00	\$162,500.00	\$0.00	\$412,500.00
2	\$268,000.00	\$162,500.00	\$0.00	\$430,500.00
3	\$213,120.00	\$162,500.00	\$0.00	\$375,620.00
4	\$250,000.00	\$162,500.00	\$0.00	\$412,500.00
5	\$250,000.00	\$162,500.00	\$0.00	\$412,500.00

- f. Click **Save** to close the window.
- g. Navigate to **Other Direct Costs** to review the system-entered line items in each budget period.

Budget Other Direct Costs				
Type	Description	Funds Requested (\$)		
Materials and Services		\$1,591.35	Edit	Remove
Subcontracts (Contracts) - Not MTDC	Jackson-tinysub	\$14,000.00	Details	Remove
Subcontractors F&A - No F&A	Jackson-tinysub	\$7,000.00	Details	Remove
Subcontracts (Contracts) - Not MTDC	Hopkins	\$125,000.00	Details	Remove
Subcontractors F&A - No F&A	Hopkins	\$81,250.00	Details	Remove
Subcontracts (Contracts) - Not MTDC	Purdue-smallsub	\$31,400.00	Details	Remove
Subcontractors F&A - No F&A	Purdue-smallsub	\$18,840.00	Details	Remove
Subcontracts - Subject to F&A	Purdue-smallsub	\$25,000.00	Details	Remove
Subcontracts (Contracts) - Not MTDC	Princeton	\$213,120.00	Details	Remove
Subcontractors F&A - No F&A	Princeton	\$162,500.00	Details	Remove

Sub Award budget							
Add Subaward							
Organization Name	Form Name	PDF	XML				
⊕ Purdue-smallsub	RR Budget V1-1	✓	✓	Details	View Form	View XML	Remove
⊕ Jackson-tinysub	RR Budget V1-1	✓	✓	Details	View Form	View XML	Remove
⊕ Hopkins	RR Budget V1-1	✓	✓	Details	View Form	View XML	Remove
⊕ Princeton	RR Budget V1-1	✓	✓	Details	View Form	View XML	Remove

7. Options available in the SUB AWARD BUDGET window:

- a. **Details:** opens the details window for review or manual entry
- b. **View Form** to view the Adobe Subaward Budget form.
- c. **View XML** to view the translated file
- d. **Remove** to delete the Organization, details, and any uploaded form.
- e. **[+] or [-]** to collapse/view the information about the uploaded and translated file

⊖ Princeton RR Budget V1-1 ✓ ✓ Details View Form View XML Remove

Details

Attachments : 1-1-12_Sub_PRINCETON_big.pdf
 PDF File : 1-1-12_Sub_PRINCETON_big.pdf
 PDF Last Updated : 2012-06-28 12:47:28.0 by rhanlon
 XML Last Updated : 2012-06-28 12:47:28.0 by rhanlon
 Sub Award Last Updated : 2012-06-28 12:47:28.0 by rhanlon
 Namespace : http://apply.grants.gov/forms/RR_Budget-V1.1
 Status : XML Generated successfully

Replacing an Uploaded Subaward File

- Click Remove to delete the entry and then follow the Add Subaward instructions.

Viewing the uploaded Subaward Form from Coeus

- Click **View Form**. The file displays in new browser window.
- Click **View XML**. The file displays in a browser window.



You *cannot* modify the Subaward files already uploaded to Coeus from the **View Form** preview window. **To make updates to the Subaward budget file or its Justification, return to the original Adobe Subaward file to make and save changes, and then re-upload that file to Coeus.**

2. b. Manual Entry of Other Direct Costs: Subaward/Subcontracts

Per A-21 Cost Principles, subawards are subject to F&A for only the first \$25,000 spent. For any subaward that exceeds the cost of \$25,000, you must have two budget line items: one for \$25,000 that bears F&A, and one for the remaining amount of the subaward which will be exempt.

In order to enter costs in other periods, you must use the **Generate All Periods** function (described in the [Generate All Periods](#) section of this document). Then, enter the individual tabs for each period and make adjustments relevant to that period.

Special NIH Subcontract Instructions for Modular submissions:

You need to select the correct Other Direct Costs budget types for Subaward F&A expenses to allow the Coeus Modular Budget Sync feature to work effectively for NIH Modular budget submissions. If you isolate the Subaward Indirect Expense entries by selecting the Subawardee’s F&A Types in your budget, Coeus will have the data to Sync to the NIH Modular budget screen and submission forms. The 4 direct cost types to use are below. 2 examples for use follow.

- Subawards Direct – Subject to F&A (for the first 25K) (Direct Costs)
- Subawards Direct – Not Subject to F&A (Direct Costs)
- Subawards F&A – No F&A (Indirect Costs)
- Subawards F&A – Subject to F&A (Indirect Costs)

Example 1 is a common scenario where the first period costs of the subaward exceeds \$25,000; three (3) lines are needed: one for the first \$25,000 bearing F&A, one for the expenses over \$25,000. The third line isolates the F&A expense of the Subaward, so Coeus can Sync that data to the Modular budget screen.

Ex. 1: Subaward: \$75,000 annual direct costs + 65% F&A of \$48,750 = \$123,750 total.

Period 1:

Subawards Direct -- subject to F&A	First 25K of subawardee direct cost	\$25,000
Subawards Direct-- not subject to F&A	Remaining subawardee direct costs	\$50,000
Subawards F&A - No F&A	Subawardee F&A costs	\$48,750

Period 2:

Subawards Direct-- not subject to F&A	Period 2 subawardee direct costs	\$75,000.00
Subawards F&A - No F&A	subawardee F&A costs	\$48,750.00

Period 3:

Subawards Direct-- not subject to F&A	Period 3 subawardee direct costs	\$75,000.00
Subawards F&A - No F&A	subawardee F&A costs	\$48,750.00

Example 2 shows how a *small* Subaward where the initial period total cost is less than the \$25,000 threshold, therefore all costs would incur Institute F&A. This uncommon scenario needs only 2 lines in period 1, but 3 lines in period 2. (Period 3 would be similar entry as shown in example 1.)

Ex. 2: Subaward \$12,000 annual direct costs + 65% F&A of \$7,800 = \$19,800 total.

Period 1:

Subawards Direct -- subject to F&A	Ex 2: small sub: less than \$25K total Y1	\$12,000.00
Subawards F&A - Subject to F&A	sub F&A to sync to Modular screen	\$7,800.00

Period 2:

Subawards Direct -- subject to F&A	P2: Funds still less than first 25K	\$5,200.00
Subawards Direct-- not subject to F&A	Sub direct costs >25K	\$6,800.00
Subawards F&A - No F&A	Sub F&A to sync to Modular screen	\$7,800.00

3. Cost Sharing

Please review the appropriateness and administrative policy of cost sharing with your Department BA or your [Authorized Official](#).

If you need to express cost sharing on a *specific* line item in the **Budget Periods** screens of your budget (**Equipment, Travel, Participant/Trainee, or Other Direct Costs**):

- Select **Edit** to open that item's **Line Item Details** window
- Enter the dollar value of the funding commitment in the **Cost Sharing** field.
- Select
 - **Save and Apply to Current Period** or
 - **Save and Apply to Current and Later Periods**, as relevant to your proposal or,
 - **Close** if you decide not to make an entry.

The amount of the cost sharing will also be updated in the Period Totals header and *Budget Totals* section of the **Budget Summary** screen.

Line Item Details					
Save and Apply to Current Period		Save and Apply to Current and Later Periods		Close	
Description: Big Widget					
Start Date:	07/01/2010	End Date:	06/30/2011	Quantity:	0.00
Cost:	\$7,500.00	Cost Sharing:	\$5,000.00	Underrecovery:	\$0.00
Apply Inflation:	<input checked="" type="checkbox"/>	On Campus:	<input checked="" type="checkbox"/>	Submit Cost Sharing:	<input checked="" type="checkbox"/>

Result after entry:

Period Totals				
Direct Cost :	\$150,131.84	Indirect Cost :	\$69,539.47	
Under Recovery :	\$0.00	Cost Share :	\$5,000.00	
Total Cost :		\$219,671.31	No. of Months :	12.0
Period : 07/01/2010 - 06/30/2011				

Budget Equipment - List items and dollar amount for each item exceeding \$5000			
Type	Description	Funds Requested (\$)	
Equipment - Not MTDC	Big Widget	\$7,500.00	Edit Remove
Total Equipment		\$7,500.00	

[Add Equipment](#) | [Calculate](#)



Note: Cost Sharing may be required to be distributed prior to marking a budget Complete. Instructions for distribution are in later section of this guide.

I. Generate All Periods from your Detailed Period 1 Budget

Generate All Periods



Prior to using **Generate All Periods**, review the **Proposal Rates** screen and review and revise the Inflation Rates, if necessary. Changes in the Inflation rates will not update to generated budgets. Consider deselecting the *Apply Inflation* checkbox on specific line items instead of entire categories in the Rates, if this is more appropriate for your proposal budget.

Investigator: Hanlon, Rosemary **Proposal #:** 00001293 (In Progress)
Agency/Sponsor: 000340 : NIH **Proposal Period:** 07/01/2010 - 06/30/2020
Title: How many licks DOES it take to get to the center of a Tootsie... **Version:** 4

Period 1

Before generation of all periods, only Period 1 tab is displayed.

Period Totals			
Direct Cost :	\$144,965.73	Indirect Cost :	\$63,318.70
Under Recovery :	\$1,700.00	Cost Share :	\$5,000.00
		Total Cost :	\$208,284.43
		Period :	07/01/2010 - 06/30/2011
			No. of Months : 12.0

Return To Proposal

- Budget Versions**
- Budget Summary** >>
- [Print](#)

Budget Set Up

- Personnel**
- [Adjust Periods](#)
- Proposal Rates**

Validate

Budget Periods

- Personnel Budget**
- Equipment**
- Travel**
- Participant/Trainee**
- Other Direct Costs**

Modular Budget

- [Cost Sharing Distribution](#)
- [Under Recovery Distribution](#)
- [Project Income](#)

Generate All Periods

Complete any Period 1 recurring expenses required for your budget and then use the **Generate All Periods** feature to calculate all budget periods for your proposal.

If you do *not* want a line item to appear in every period, do not include it in Period 1. **Generate All Periods** *first*, and then enter that line item in the appropriate period(s).

The **Generate All Periods** option on the Budget navigation menu will disappear after application. Once the budget periods are generated, you cannot “undo” the process.

You *can* manipulate the data in each budget period to alter the results (see the section Adjust by Period), or you can create a new budget version (see the section Budget Versions: Create Alternate Versions of your Budget).

Coeus uses the Budget Period start and end dates, inflation percentages and other rates from the **Proposal Rates** screen, and the line item costs entered in the **Budget Period** screens to calculate expenses and generate each requested budget period.

Prior to using **Generate All Periods**, follow the next steps to review your budget entries.

1. Preview All Budget Expenses

Before using the **Generate All Periods** function, preview your budget entries in all categories by printing a report.

- Click **Print** on the Budget menu.
- From the **Proposal Print** screen, click **Budget Summary by Period**.
- A new browser window will open to display the Internal Budget Summary view of your budget, by period, in a PDF format. This complete budget will display by Category and Sponsor Budget Group.
 - Personnel, by name, will print out with Start and End dates, Fringe Rates applied (if appropriate), Fringe Benefit costs (if appropriate), and Salaries & Wages.
 - Descriptions entered for all budget line items will print on this Summary form.
 - The Calculation Methodology page of the summary lists any items excluded from the F&A base costs requested, the F&A rates and bases applied the Employee Benefit rates and bases, and Vacation Accrual Rates and bases.

Coeus Proposal Development - Budget Summary								
Proposal Number:		00003592		Budget Version : 1				
Proposal Title:		Sample for screen shots						
Investigator Name:		Hanlon, Rosemary						
Period : 1		01 Jan 2009 - 31 Dec 2009						
	Personnel Category	Start Date	End Date	EB Rate	Vac Rate	Percentage Charged/Effort	Fringe Benefits	Salaries & Wages
Other Professionals								
Hanlon, Rosemary	Administrative Staff - On	02/01/09	12/31/09	24.00%	9.50%	25.0 / 25.0	\$7,803	\$23,292
Computer Programmer	Research Staff - On	02/01/09	12/31/09	24.00%	9.50%	50.0 / 50.0	\$12,283	\$36,667
Seuss, Doctor,	Research Staff - On	01/15/09	12/31/09	24.00%	9.50%	25.0 / 25.0	\$7,471	\$22,303
TBA - Project Coordinator	Program Manager	02/01/09	12/31/09	24.00%	9.50%	100.0 / 100.0	\$9,212	\$27,500
Total Other Professionals							\$36,770	\$109,761
Graduate Students								
TBA Research	Research Asst - On	02/01/09	12/31/09			10.0 / 10.0	\$0	\$1,633
Total Graduate Students							\$0	\$1,633
TOTAL SALARIES & WAGES								\$111,394
Fringe Benefits: Total Fringe Benefits and Vacation Accrual:								\$36,770
TOTAL SALARIES & WAGES & FRINGE BENEFITS								\$148,164
Equipment								
Equipment - Not MTDC - Big Widget								\$7,500
Total Equipment							\$7,500	
Materials								
Materials and Services - minor equipment-server memory upgrade								\$3,000
Total Materials							\$3,000	
Publication Costs/Documentation/Dissemination								
Printing - In-house publication costs- supplies								\$2,500
Total Publication Costs/Documentation/Dissemination							\$2,500	
Trainee/Participant Costs - Stipends								
Stipends - Not MTDC - 10 Trainees, 2 months each								\$40,000
Stipends							\$40,000	

Calculation Methodology	
The full F&A (Indirect) Cost Rate is applied to the total direct costs, less the following exclusions	
Equipment - Not MTDC - Big Widget	\$7,500
Stipends - Not MTDC - 10 Trainees, 2 months each	\$40,000
Travel Expenses - Domestic Meeting-PI attendance required	\$1,850
Total exclusions from F&A base	\$49,350
The Allocated Administrative Support and Allocated Lab Expense Rates are applied to the total direct costs, less the following exclusions.	
Total exclusions from Allocated Expense base	\$0
F&A (Indirect) Cost Rates and Base	
Start Date	Rate Type

This is the budget format displayed during the Coeus Web Proposal Approval process. Many campus approvers evaluate this comprehensive view of the budget in their review process.

You can print and/or save this PDF file for distribution by email or hardcopy to proposal participants for their review.

2: Navigate to Generate all Periods

Generate All Periods

Select **Generate All Periods** on the menu. This will start a process which will use all of the Period 1 line items to create details for subsequent periods.

- a. A warning screen will appear to alert you of the one-time-use per budget of the Generate option. Click **Generate Periods** on this screen to continue.

Generate Periods

Prepare entire budget for period 1 and use the **Generate Periods** utility to forward the data for subsequent years. This process will copy Period 1 line item content of each section to create budget for subsequent years.

This utility will expire after initial use. So please make sure you have completed all required information for Period 1 under each section. Click on **Generate Periods** to continue

- b. A confirmation screen will display upon completion.

Generate Periods

Budget Periods are generated successfully

- c. When you return to view the **Budget Periods** screens of your budget (**Personnel, Equipment, Travel, Participant/Trainee, or Other Direct Costs**), the additional periods will be displayed as tabs.

Investigator: Hanlon, Rosemary **Proposal #:** 00001293 (In Progress)
Agency/Sponsor: 000340 : NIH **Proposal Period:** 07/01/2010 - 06/30/2020
Title: How many links DOES it take to get to the center of a Tootsie **Version:** 4

Period 1 Period 2 Period 3 Period 4 Period 5 Period 6 Period 7 Period 8 Period 9 Period 10

Period Totals

Direct Cost : \$144,965.73	Indirect Cost : \$63,318.70	Total Cost : \$208,284.43	No. of Months : 12.0
Under Recovery : \$1,700.00	Cost Share : \$5,000.00	Period : 07/01/2010 - 06/30/2011	



Notice the default period in focus (blue) is always Period 1. Other tab headers appear silver/gray.

3: Adjust budget by period

Enter each budget category screen (**Personnel Budget, Equipment, Travel, etc.**) to review the line items and make adjustments per period as needed. You can edit, remove or add line items as appropriate for your project requirements.

For example:

- Add and remove Personnel
- Adjust Personnel effort, or period of performance
- Add or remove expense line items
- Adjust costs generated on line items



Most Edit, Modify, and Save actions in the budget will return the default Period 1 tab. Be certain to Click on the budget period tab you wish to edit, and make sure it is Blue.

J. Navigate to the Budget Summary Screen

Budget Summary

<p>Return To Proposal</p> <p><input checked="" type="checkbox"/> Budget Versions</p> <p><input checked="" type="checkbox"/> Budget Summary >></p> <p>Print</p> <p>Budget Set Up</p> <p><input checked="" type="checkbox"/> Personnel</p> <p>Adjust Periods</p> <p><input checked="" type="checkbox"/> Proposal Rates</p> <p>Validate</p> <p>Budget Periods</p> <p><input checked="" type="checkbox"/> Personnel Budget</p> <p><input checked="" type="checkbox"/> Equipment</p> <p><input checked="" type="checkbox"/> Travel</p> <p><input checked="" type="checkbox"/> Participant/Trainee</p> <p><input checked="" type="checkbox"/> Other Direct Costs</p> <p>Modular Budget</p>	<p>Investigator: Hanlon, Rosemary Agency/Sponsor: 000340 : NIH Title: How many licks DOES it take to get to the center of a Tootsie...</p> <p>Proposal #: 00001293 (In Progress) Proposal Period: 07/01/2010 - 06/30/2020 Version: 4</p> <p>Budget Summary</p> <p>Budget Summary : Version 4</p> <p>Budget Status: <input type="text" value="Incomplete"/> Final: <input type="checkbox"/> Modular Budget: <input type="checkbox"/> Submit Cost Sharing: <input checked="" type="checkbox"/></p> <p>On/Off Campus: <input type="text" value="Default"/> Total Cost Limit: <input type="text" value="\$0.00"/></p> <p>Residual Funds: <input type="text" value="\$0.00"/> Total Direct Cost Limit: <input type="text" value="\$0.00"/></p> <p>OverHead Rate Type: <input type="text" value="MTDC"/> Underrecovery Rate Type: <input type="text" value="MTDC"/></p> <p>Comments: <input type="text" value="10 period budget"/></p> <p><input type="button" value="Save"/></p> <p>Budget Totals</p> <table border="1"> <tr> <td>Direct Cost : \$144,965.73</td> <td>Indirect Cost : \$63,318.70</td> <td>Total Cost : \$208,284.43</td> </tr> <tr> <td>Under Recovery : \$1,700.00</td> <td>Cost Share : \$5,000.00</td> <td>Period : 07/01/2010 - 06/30/2020</td> </tr> </table> <p>Budget Periods</p> <table border="1"> <thead> <tr> <th>Period</th> <th>Start Date</th> <th>End Date</th> <th>No. of Months</th> <th>Direct Cost</th> <th>Indirect Cost</th> <th>Under Recovery</th> <th>Cost Sharing</th> <th>Total Cost</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>07/01/2010</td> <td>06/30/2011</td> <td>12.0</td> <td>\$144,965.73</td> <td>\$63,318.70</td> <td>\$1,700.00</td> <td>\$5,000.00</td> <td>\$208,284.43</td> </tr> <tr> <td>2</td> <td>07/01/2011</td> <td>06/30/2012</td> <td>12.0</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td>3</td> <td>07/01/2012</td> <td>06/30/2013</td> <td>12.0</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> </tbody> </table>	Direct Cost : \$144,965.73	Indirect Cost : \$63,318.70	Total Cost : \$208,284.43	Under Recovery : \$1,700.00	Cost Share : \$5,000.00	Period : 07/01/2010 - 06/30/2020	Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost	1	07/01/2010	06/30/2011	12.0	\$144,965.73	\$63,318.70	\$1,700.00	\$5,000.00	\$208,284.43	2	07/01/2011	06/30/2012	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	3	07/01/2012	06/30/2013	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Cost : \$144,965.73	Indirect Cost : \$63,318.70	Total Cost : \$208,284.43																																									
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Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost																																			
1	07/01/2010	06/30/2011	12.0	\$144,965.73	\$63,318.70	\$1,700.00	\$5,000.00	\$208,284.43																																			
2	07/01/2011	06/30/2012	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00																																			
3	07/01/2012	06/30/2013	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00																																			

On this screen, you can review your project costs: direct and indirect costs (totals and by project period), cost sharing (totals and by project period), and total costs (total and by project period).

Be sure to review the **OverHead Rate Type** applied for this proposal.

Things you can modify on the Budget Summary Screen:

- Change the *Budget Status* drop-down to *Complete* once you have completed the budget (this can also be done on the **Budget Versions** screen). Note: The budget version must be marked Final before it can be marked Complete.
- Select the **Final** checkbox to transmit this budget (this can also be done on the **Budget Versions** screen).
- Select the **Modular Budget** checkbox if this budget will be an NIH Modular budget.
- De-select the **Submit Cost Sharing** checkbox. The default is checked to submit – to publish budgeted cost share expense on the appropriate Grants.gov S2S forms.
 - Uncheck the box to prohibit ALL the cost share expenses from appearing on the forms OR
 - Keep the box checked and control the inclusion of cost sharing expense at each line item level.
- Select the **On/Off campus** option to override the cost element overhead mapping.
 - Select “Off” to have Coeus apply the maintained Off Campus Overhead rates to all the budgeted cost elements, despite the cost element description of On Campus.
 - Select “On” to have Coeus apply the maintained On Campus Overhead rates to all budgeted cost elements, despite the cost element description of Off Campus.
 - Select “Default” to have Coeus apply the maintained OH rate for that cost element. Default allow for the inclusion of both On- and Off-campus rates in the budget.
- Enter *Residual Funds* (refer to sponsor guidelines for requirement definitions).
- Enter a *Total Cost Limit* (reference only – this will NOT restrict your CoeusLite budget).
- Enter a *Direct Cost Limit* (reference only – this will NOT restrict your CoeusLite budget).
- Change the *Over Head Rate Type*.
- Enter text in the *Comments* field to make notes about this budget.

Once you have completed your changes to this screen, Select **Save**.



- Enter the Direct, Indirect, Cost Sharing in the Summary
 - If you create a detailed budget, the Summary budget fields will contain totals entered by Coeus, which are then read-only: you cannot modify the contents of these fields.
 - Alternatively, users can directly enter period budget total data into the fields instead of creating detailed period budgets. This practice can be useful when sponsors do not require any budget details at the time of submission, but still require the anticipated budget total to appear on the SF 424 R&R. Additionally, these entered values will populate the Institute Proposal module Initial and Total Project columns. You must enter the values here if you did not complete the budget in Coeus.

Budget Totals						
Direct Cost : \$0.00	Indirect Cost : \$0.00					Total Cost : \$0.00
Under Recovery : \$0.00	Cost Share : \$0.00					Period : 10/01/2012 09/30/2017

Budget Periods								
Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	10/01/2012	09/30/2013	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	10/01/2013	09/30/2014	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	10/01/2014	09/30/2015	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4	10/01/2015	09/30/2016	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5	10/01/2016	09/30/2017	12.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Save

K. Navigate to the Budget Versions Screen

Budget Versions

a. Create Alternate Versions of your Budget

This screen displays a summary of all budget versions created in the proposal. If you have created more than one version of the budget, you must click **Open** to the right of the budget version you want to access.

Budget Versions

Budget Status: Final Version:

Version	Start Date	End Date	Direct Cost	Indirect Cost	Total Cost	Final		
1	07/01/2010	06/30/2013	\$107,537.82	\$74,201.10	\$181,738.92	<input type="checkbox"/>	Open	Copy
Comments: <input type="text" value="First draft"/>								
2	07/01/2010	06/30/2013	\$78,186.80	\$53,948.89	\$132,135.69	<input type="checkbox"/>	Open	Copy
Comments: <input type="text" value="In progress - periods not generated yet."/>								

[Add New Version](#)

Budget Summary Comments displays in the Version panel.



Use the Budget Summary comments to help identify the significant differences between versions.

Things you can do on the Budget Versions Screen:

- Change the **Budget Status** of a selected version to **Complete** or **Incomplete** (you cannot edit a budget marked **Complete**).
- Select or deselect the **Final** status checkbox. You must do this either on this screen or on the **Budget Summary** screen prior to routing for approval.
- Navigate to the Budget details of a particular version; select **Open** to the right of the budget version.
- Create an alternate budget scenario by copying an existing version of the budget, click **Copy** – you can choose to copy only period one, or all periods, depending on how many changes you'd like to make
- Create alternate budget scenario, select the [Add New Version](#) link to start a new, blank budget.

Once you have completed your changes to this screen, select save.



Once you have more than one version of the budget, you will always be brought to this screen when you navigate to **Budget**. You must click **Open** to the right of the budget version you want to access.

Coeus Lite and Modular Budgets (NIH ONLY)

Currently Modular budgets are a submission option for certain NIH opportunities ONLY. Review the specific funding opportunity to determine if Modular budgeting is an option or a requirement, as well as the module limits per budget period.

Note on Modular Budgets (NIH): Even if you are required to submit only a Modular budget (and not a detailed budget) to NIH, creating a detailed budget will assist you by populating the Modular Budget form. A Coeus detailed budget calculates indirect costs, which are required for these forms and can populate your calculated indirect costs to the **Modular Budget** screen, making finalizing your budget much quicker.

You have 2 options for providing this detailed budget in addition to the Modular budget:

1. You can create the detailed budget in CoeusLite and convert it to a Modular format.

If you prepared a Detailed budget in Coeus, use the **Sync with Detailed Budget** function to have Coeus convert the required details into a Modular budget (*closest \$25,000 module into the Direct Cost Less Consortium F&A field, Consortium F&A, and Indirect Cost details*). You can then manually adjust the module amounts suggested by Coeus as needed.

OR

2. Create a detailed budget outside of CoeusLite and manually create a Modular budget.

You can also create an external supporting budget in the program of your choice, and upload it on the **Upload Attachments** screen in the **Upload Institutional Attachments** tab to assist reviewers during internal review.

To then create the Modular budget; manually enter the required details in the **Modular Budget** screen in order to populate the mandatory forms.



You *must* click the *Modular Budget* checkbox on the **Budget Summary** screen for Coeus to populate your Modular budget information on the Grants.gov PHS Modular Budget Form.

Budget Summary

Budget Summary : Version 1

Budget Status: <input type="text" value="Incomplete"/>	Final: <input checked="" type="checkbox"/>	Modular Budget: <input checked="" type="checkbox"/>	Submit Cost Sharing: <input checked="" type="checkbox"/>
On/Off Campus: <input type="text" value="Default"/>	Total Cost Limit: <input type="text" value="\$0.00"/>		
Residual Funds: <input type="text" value="\$0.00"/>	Total Direct Cost Limit: <input type="text" value="\$0.00"/>		
OverHead Rate Type: <input type="text" value="MTDC"/>	Underrecovery Rate Type: <input type="text" value="MTDC"/>		
Comments: <input type="text" value="First draft"/>			

Budget Totals

Direct Cost : \$108,564.48	Indirect Cost : \$74,909.49	Total Cost : \$183,473.97
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2010 - 06/30/2013

Budget Periods

Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	07/01/2010	06/30/2011	12.0	\$35,079.53	\$24,204.88	\$0.00	\$0.00	\$59,284.41
2	07/01/2011	06/30/2012	12.0	\$36,199.48	\$24,977.64	\$0.00	\$0.00	\$61,177.12
3	07/01/2012	06/30/2013	12.0	\$37,285.47	\$25,726.07	\$0.00	\$0.00	\$63,012.44

L. Navigate to Modular Budget Screen:

Modular Budget

1. With a Final Coeus detailed budget marked Modular on the Budget Summary screen, open the Modular Budget screen to sync the data for Direct Costs, Consortium F&A (subawards), and Indirect Costs data for the PHS form.

a. Select **Modular Budget** on the Budget menu

b. Select **Sync with Detailed Budget**

Investigator: Hanlon, Rosemary
 Agency/Sponsor: 000340 : NIH
 Title: 4.3.1 Lite User Guide sample for screen shots

Proposal #: 00003979 (In Progress)
 Proposal Period: 01/01/2009 - 12/31/2011
 Version: 1

Period 1 | Period 2 | Period 3 | Cumulative
 Period: 01/01/2009 - 12/31/2009

Direct Costs

Direct Cost less Consortium F&A: \$0.00
 Consortium F&A: \$0.00
 Total Direct Costs: \$0.00

Indirect Costs

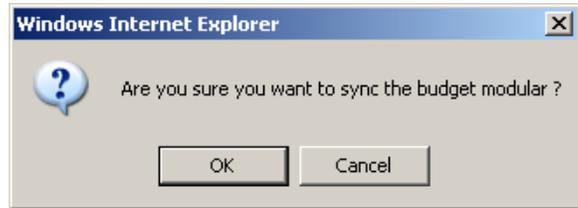
Rate Number	Indirect Cost Type	IDC Rate(%)	IDC Base	Funds Requested(\$)
Total Indirect Costs:				\$0.00
Total Funds Requested:				\$0.00

[Add Indirect Cost](#) | **Sync with Detailed Budget**

Save

c. Select **OK** when the confirmation window opens.

- Review the data defaulted in each of the Period tabs.
 - All the white-background fields are editable: review each period and adjust the amounts, if needed.
 - It is especially important to review in the *Direct Cost less Consortium F&A* field to reflect the appropriate number of \$25,000 modules
 - Review each Rate Number row, especially if Off campus rates are utilized in the budget, or if multiple Fiscal Year Rates are present for a budget period crossing Fiscal Years with varying maintained F&A rates.



Period 1 | Period 2 | Period 3 | Cumulative
 Period: 01/01/2009 - 12/31/2009

Direct Costs

Direct Cost less Consortium F&A: \$250,000.00
 Consortium F&A: \$0.00
 Total Direct Costs: \$250,000.00

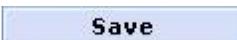
Indirect Costs

Rate Number	Indirect Cost Type	IDC Rate(%)	IDC Base	Funds Requested(\$)
1	MTDC	68.0	\$200,211.93	\$136,144.11
Total Indirect Costs:				\$136,144.11
Total Funds Requested:				\$386,144.11

[Add Indirect Cost](#) | [Sync with Detailed Budget](#)

Save

d. Select **Save**



2. If you have NOT prepared a detailed budget in Coeus, you must manually enter the required costs in the **Modular Budget** screen. (You must still check the Modular option on the Budget Summary screen.)

For Period 1:

- a. **Select Modular Budget.**
- b. **Enter** the *Direct Cost less Consortium F&A* amount.
- c. **Enter** *Consortium F&A* costs (if any).
- d. **Select Add Indirect Cost** to create an entry line for the Indirect Cost data.

Period 1	Period 2	Period 3	Cumulative	
Period: 01/01/2009 - 12/31/2009				
Direct Costs				
Direct Cost less Consortium F&A:			\$0.00	
Consortium F&A:			\$0.00	
Total Direct Costs:			\$0.00	
Indirect Costs				
Rate Number	Indirect Cost Type	IDC Rate(%)	IDC Base	Funds Requested(\$)
			Total Indirect Costs:	\$0.00
			Total Funds Requested:	\$0.00
Add Indirect Cost Sync with Detailed Budget				
<input type="button" value="Save"/>				

- Enter Indirect Cost Type: as appropriate for your proposal.
- Enter IDC Rate (%) – *field expressed as a percentage – enter whole numbers.*
- Enter IDC Base (from your non-Coeus Detailed budget).
- Enter *Funds Requested (\$).*

e. **Select Save**

f. Repeat entries as needed for all remaining periods by clicking the *Period 2* tab, *Period 3* tab, etc.

g. Review the Cumulative screen to confirm totals.

Period 1	Period 2	Period 3	Cumulative
Total Costs, Entire Project Period			
Total Direct Cost less Consortium F&A for Entire Project Period			\$750,000.00
Total Consortium F&A for Entire Project Period			\$146,250.00
Total Direct Costs for Entire Project Period			\$896,250.00
Total Indirect Costs for Entire Project Period			\$312,400.75
Total Direct Costs and Indirect Costs for Entire Project Period			\$1,208,650.75

M. Navigate to Cost Sharing Distribution

Cost Sharing Distribution

- Select **Cost Sharing Distribution** from the left Navigation bar.
- If you have not incurred cost sharing in your budget, you will receive a notice instead of the distribution screen.

Investigator: Hanlon, Rosemary
 Agency/Sponsor: 000340 : NIH
 Title: How many licks DOES it take to get to the center of a Tootsie...
 Proposal #: 00000421 (In Progress)
 Proposal Period: 06/01/2010 - 05/31/2013
 Version: 1

There is no Cost Sharing for this version of the Budget

- If Cost Sharing commitments have been generated in the budget periods, the amounts will be displayed in the **Total Cost Sharing Amount** panel.

Use the **Cost Sharing Distribution List** panel to identify the source(s) of funding support for the commitment. The initial list will be generated with a line for each fiscal year a cost sharing commitment exists, but additional lines can be added to identify multiple sources for each fiscal year.

- **Enter** the Source Account Code for each Fiscal Year Commitment. For waived F&A use VP-R.
- If needed, use **Add Cost Sharing Distribution** to generate a new entry line.
 - Edit the **Project Year** to align with the budget period, if needed
 - Enter **Percent** (optional), **Amount**, and **Source Account Code**.
- Use **Remove** to delete an unnecessary entry line.
- Select **Save**

Budget Totals				
Direct Cost :	\$1,712,620.80	Indirect Cost :	\$666,644.06	Total Cost : \$2,379,264.86
Under Recovery :	\$0.00	Cost Share :	\$46,750.00	Period : 10/01/2012 - 09/30/2017

Budget Period	Total Cost Sharing Amount
1	\$16,750.00
2	\$10,000.00
3	\$5,000.00
4	\$10,000.00
5	\$5,000.00

Cost Sharing Distribution List				
Add Cost Sharing Distribution	View Sub Award Cost Sharing			
Project Year	Percent	Amount	Source Account	
2013	0.00	\$16,750.00		Remove
2014	0.00	\$10,000.00		Remove
2015	0.00	\$5,000.00		Remove
2016	0.00	\$10,000.00		Remove
2017	0.00	\$5,000.00		Remove

Click [View Sub Award Cost Sharing](#) to display any maintained values from added Sub Awards.





- Click on each Organization to view the amounts maintained in the Sub Award Details. (This is a view-only window. Edits must be made in the Sub Award Details window.)
- Use this feature to view totals and determine if you wish to attribute lines in the prime budget's distribution list to one of these sources.
- Click Close to exit this window.

As maintained with a Source Account entered for each Project Year, with Project Year 1 using two lines.

Budget Totals					
Direct Cost :	\$1,712,620.80	Indirect Cost :	\$666,644.06	Total Cost :	\$2,379,264.86
Under Recovery :	\$0.00	Cost Share :	\$46,750.00	Period :	10/01/2012 - 09/30/2017
Budget Period					
Budget Period	Total Cost Sharing Amount				
1	\$16,750.00				
2	\$10,000.00				
3	\$5,000.00				
4	\$10,000.00				
5	\$5,000.00				
Cost Sharing Distribution List :					
Add Cost Sharing Distribution View Sub Award Cost Sharing					
Project Year	Percent	Amount	Source Account		
2013	0.00	\$11,750.00	MITPI	Remove	
2013	0.00	\$5,000.00	externalSub1	Remove	
2014	0.00	\$10,000.00	externalSub1	Remove	
2015	0.00	\$5,000.00	externalSub1	Remove	
2016	0.00	\$10,000.00	externalSub1	Remove	
2017	0.00	\$5,000.00	externalSub1	Remove	
Save					

N. Navigate to Project Income

Project Income

Review the sponsor program announcement and sponsor guidelines for specific instructions regarding the handling of Project Income in your submission.

To enter Project Income in your budget:

1. Select Project Income

Project Income Summary			
Period	Income		
Project Income Details			
Period	Income	Description	
Add Project Income			

2. Select [Add Project Income](#).

Project Income Summary			
Period	Income		
Project Income Details			
Period	Income	Description	
1	\$0.00		View Remove
Add Project Income			
<input type="button" value="Save"/>			

3. Select the *Period* from the drop-down menu.

4. Enter the *Income* funds.

5. Enter a *Description*.

6. If you need to enter a more detailed description of the Income funds, select **View** to the right of the line item and enter your comments.

7. Select **Remove** to delete the entry.

8. Select **Save**

Repeat for each period with Project Income to report.

O. Perform Budget Validations

Validate

Business Rule Validations for Proposal Budgets.

Coeus provides budget-specific validation rules. Users can manually perform the validations prior to finalizing their budgets but budget validation rules will automatically be run when a budget is marked Complete. If the budget fails the validation rule, it cannot be marked Complete. The user will be presented with an error notice and be advised to return to the budget and fix the error condition. See the Coeus Premium Application Administrator Guide for details on creating Budget Business Rules.

Return To Proposal

- ✓ Budget Versions
- ✓ Budget Summary >>
- Print
- Budget Set Up**
- ✓ Personnel
- Adjust Periods
- ✓ Proposal Rates
- Validate** ←
- Budget Periods
- ✓ Personnel Budget

Investigator: Hanlon, Rosemary
Agency/Sponsor: 000500 : NSF
Title: Sea Monkeys: monkey sea, monkey dew--FROM NON-LA rate to LA u...
Proposal #: 00005462 (In Progress)
Proposal Period: 09/01/2009 - 08/31/2012
Version: 1

Please review the following items before continuing the routing process for Proposal 00005462

The budget for proposal 00005462 failed for following Errors. Please fix them.

Department:Massachusetts Institute of Technology
 You did not include Tuition funds for your budgetted Graduate Student. Please add Tuition funds or remove the Graduate Student

The budget for proposal 00005462 validated with the following warnings.

Department:Massachusetts Institute of Technology
 Please review the budgetted a Stipend expense. This category is generally not allowed on NIH research grants.

OK



The proposal must have a budget, and the budget must be marked **Final** in order to perform the Budget Business Rule Validations!

Budget Validation Errors:

- If a proposal budget fails a validation rule, a red error notice is presented to the user.
- The Department (unit) where the rule is applied appears in the alert text, as validation rules can be applied at any level in the hierarchy.
- The budget cannot be marked Complete until the budget can pass the validation.
- If more than one budget validation rule failed, all user messages will be presented with a red Error heading.

Budget Validation Warnings:

- Validation Warnings are presented under a blue validation notice.
- The Department (unit) where the rule is applied appears, as validation rules can be applied at any level in the hierarchy.
- Warning messages do *not* keep a budget from being marked Complete.
- If more than one budget validation warning was triggered, all user messages will be presented with a blue Warning heading.

P. Finalize Your Budget



Before submitting a proposal for approval routing, you must mark your budget as *Final* and *Complete*.

Budget Summary

Navigate to the Budget Summary screen.

Investigator: Barack Obama
 Agency/Sponsor: H00003 : National Institutes of Health
 Title: Donnellon_Coeus 03

Proposal #: 00000174 (In Progress)
 Proposal Period: 07/01/2012 - 06/30/2017
 Version: 1

Budget Summary

Budget Summary : Version 1

Budget Status: Complete
 On/Off Campus: Default
 Residual Funds: \$0.00
 OverHead Rate Type: MTDC
 Comments:

Final: Modular Budget: Submit Cost Sharing:
 Total Cost Limit: \$0.00
 Total Direct Cost Limit: \$0.00
 Underrecovery Rate Type: M

Save

Budget Totals

Direct Cost : \$1,250,000.00	Indirect Cost : \$712,500.01	Total Cost : \$1,962,500.01
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2012 - 06/30/2017

Budget Periods

Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	07/01/2012	06/30/2013	12.0	\$250,000.00	\$142,500.01	\$0.00	\$0.00	\$392,500.01
2	07/01/2013	06/30/2014	12.0	\$250,000.00	\$142,500.00	\$0.00	\$0.00	\$392,500.00
3	07/01/2014	06/30/2015	12.0	\$250,000.00	\$142,500.00	\$0.00	\$0.00	\$392,500.00
4	07/01/2015	06/30/2016	12.0	\$250,000.00	\$142,500.00	\$0.00	\$0.00	\$392,500.00
5	07/01/2016	06/30/2017	12.0	\$250,000.00	\$142,500.00	\$0.00	\$0.00	\$392,500.00

UC is not using Underrecovery at this time

Select the **Final** checkbox to mark this version of the budget as Final. (Note: this indicates that only this version of the budget will be transmitted to the sponsor.) You can also indicate this Final status on the **Budget Versions** screen.

Select the **Modular Budget** check box if you are submitting this budget as Modular to **NIH ONLY**.



For Modular budget, you must also select the **INCLUDE** checkbox on the PHS398 Modular Budget form on the Grants.gov screen to validate and transmit the modular budget with your proposal.

Select **Complete** from the Budget Status drop-down menu.

Select **Save**

Navigate to **Return to Proposal**.

13. Navigate to Upload Attachments

Upload Attachments

- Select **Upload Attachments** screen.

There are three (3) areas where files can be uploaded:

<p>Upload Proposal Attachments</p>	<p>These documents or files are required as defined by the sponsor opportunity instructions and their general submission guidelines.</p> <p>A base list of types will always be presented. To display the types required for Grants.gov submissions, an opportunity <i>must already have been</i> selected in General Info for this proposal.</p>
<p>Upload Personnel Attachments</p>	<p>These are person-specific files (biosketch, current & pending, etc.)</p>
<p>Upload Institutional Attachments</p>	<p>These attachments are for internal UC use only. They do not go to the funding agency. Please consult your Department BA or your Authorized Official for specific requirements.</p>



TIP: Link your proposal to the sponsor opportunity using the Grants.gov screen **before** you navigate to upload attachments. You won't be able to see and select most of the form-specific attachment types until you link to an opportunity.



For **Proposal Attachments**: Coeus will filter the narrative types and present only those relevant to your submission. For Grants.gov submissions, the types presented will only be those relevant to the forms used in the sponsor selected.

Upload Proposal Attachments | Upload Personnel Attachments | Upload Institutional Attachments

Add Documents

Attachment Type:

Description:

File Name:

Complete:

List of Proposal Attachments

Attachment Type	File Name	Uploaded Date by Update User	Complete	Description



ALERT: Follow the sponsor-specific instructions for what to name your uploaded documents. Put that name in the **Description** field in Coeus. The name of your uploaded file is NOT used by Coeus – your file can have the same name, but the **Coeus Description field must conform to the sponsor instructions.**

Upload Proposal Attachment instructions:

- **Select** the Proposal Attachment tab
- **Select** an *Attachment Type* from the drop-down list (*list varies by opportunity selected*)
- **Enter** a *Description* (may be required for some narrative types or per the sponsor instructions)
- **Check/Uncheck** Complete box
- **Select** Browse to find and upload your file.
- **Save:** Result: the file is added to List of *Proposal Attachments*.
- Repeat for all required Proposal Narrative Attachment Types.

Attachment Type:

Description:

File Name:

Complete:

List of Proposal Attachments

Attachment Type	File Name	Uploaded Date by Update User	Description

Add Documents

Attachment Type:

Description:

File Name:

Complete:

Complete Narrative checkbox:

The default is checked. If a narrative was not checked as Complete prior to routing for approval, the **Complete** column will display a red X. All narratives attachments must be marked Complete BEFORE final approval action. Use the Refresh Narratives function to upload the final document and/or check the box to confirm the complete status of the narrative attachments.

List of Proposal Attachments:

As narrative attachments are saved, they appear in a table below Add Documents.

- **Select Remove** to delete the uploaded file and attachment type
- **Select View** to open the file in a new browser window
- **Click** on the **Attachment Type/File Name** to refresh the narrative attachment.

List of Proposal Attachments				
Attachment Type/File Name/Uploaded Date by Update User	Complete	Description		
Budget.Justification NSF-BgtJustif.pdf (Uploaded: 09/10/2010 15:10 by Tester07)	✓		Remove	View
Narrative NSF_projSummary.pdf (Uploaded: 09/10/2010 15:10 by Tester07)	✗	draft document...work in progr...	Remove	View

Refresh Proposal Attachment instructions:

The following proposal narrative aspects can be refreshed (changed) in an approval-in-Progress (routing) proposal:

- **Upload** a new narrative file
- Edit the **Description** field only
- Check Complete **Status** (see end notes for related case)



Refreshed Narratives **send an email to all Approvers that have already approved the proposal.** The message will alert the approvers that a file has been updated (the refreshed narrative will be identified in the email).

To refresh, an existing Aggregator must locate and open the proposal, navigate to the **Upload Narrative** screen.

- Click on the Tab where the narrative was initially maintained.
- **Locate** the narrative to be **updated**.
- **Click on the narrative FILE NAME** – first cell in table – not the View button.

Title: How much wood would a woodchuck chuck if a woodchuck could ch...

Upload Proposal Attachments | Upload Personnel Attachments | Upload Institutional Attachments

Add Documents

Attachment Type: Please Select

Description:

File Name:

Complete:

Save

List of Proposal Attachments

Attachment Type/File Name/Uploaded Date	Complete	Description		
PHS_Cover_Letter Cover_Letter_Component.pdf (Uploaded: 07/19/2010 11:52 by Tester07)	✓	letter-scannedpdf	Remove	View
BudgetJustification Detailed Budget Justification.pdf (Uploaded: 07/19/2010 11:53 by Tester07)	✓	detailed-budget-justification	Remove	View
Narrative Mentoring Plan.pdf (Uploaded: 09/09/2010 12:19 by Tester07)	✗	science section for Foundatio...	Remove	View

The Add Document panel will update: an **Upload New File** button appears (where the Browse button appears in Modify mode). Only the **circled** fields can be refreshed.

Title: How much wood would a woodchuck chuck if a woodchuck could ch...

Upload Proposal Attachments | Upload Personnel Attachments | Upload Institutional Attachments

Add Documents

Attachment Type: Narrative

Description: science section for Foundation proposal - not s2s grants.tov

File Name: Mentoring Plan.pdf

Complete:

Save **Upload New File**

Refresh an Uploaded Narrative File (replacing the existing file):

- Click **Upload New File**, the button will convert to **Browse**.
- Click **Browse**; locate the file; select and save it to return to the Add Document screen.
- **Save**

To edit the Description only without replacing the file:

- Click in the **Description** field and make the changes.
- **Save**

To mark the Narrative as Complete:

If a narrative was not checked as Complete prior to routing for approval, the **Complete** column will display a red X. All narratives must be marked Complete in order to support final approval actions. Incomplete narratives will prohibit the proposal from completing the approval cycle. Submit to sponsor to achieve “submitted” status.

- Click **Complete** checkbox.
- **Save**

Refreshing Complete status: The Attachment type “Other” is incomplete.

Upload Proposal Attachments | Upload Personnel Attachments | Upload Institutional Attachments

Add Documents

Attachment Type: Other

Description: letter

File Name: Hopkins_test_file.docx **Upload New File**

Complete:

Save

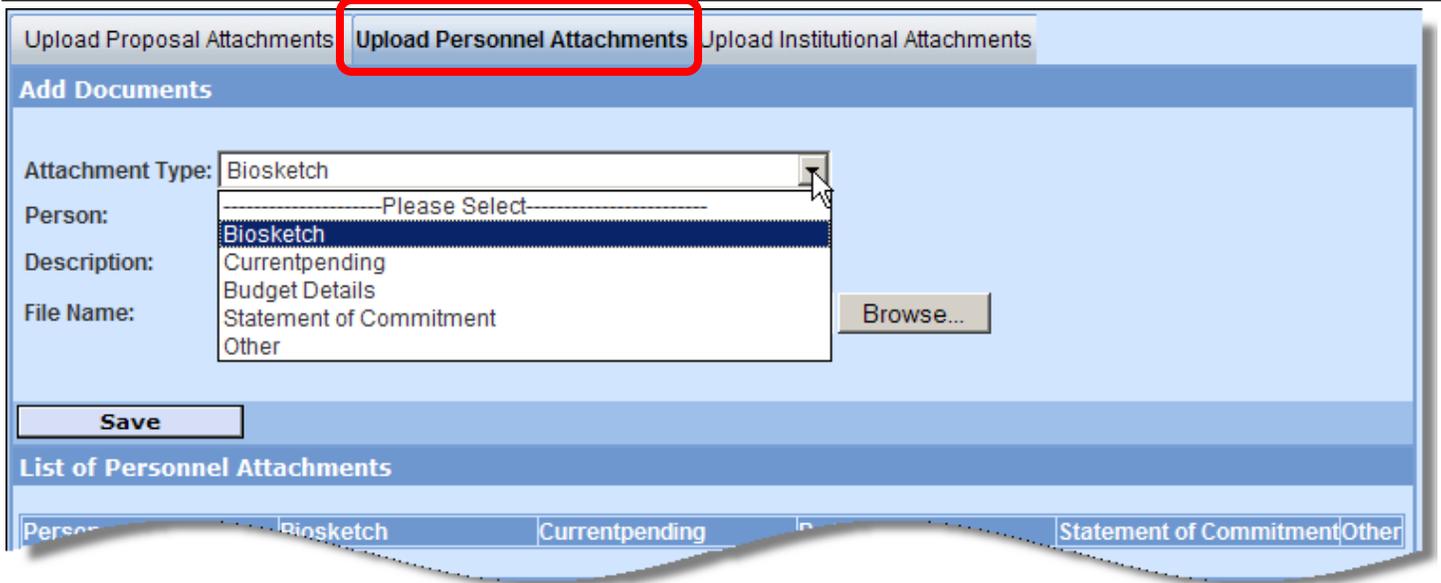
List of Proposal Attachments

Attachment Type/File Name/Uploaded Date by Update User	Complete	Description	
Narrative 2_Specific Aims.pdf (Uploaded: 09/09/2010 13:49 by Tester07)	✓	document with science section	Remove
Other Hopkins_test_file.docx (Uploaded: 09/09/2010 13:39 by Tester07)	✗	letter	Remove

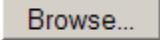
After refreshing the Complete status, the column contains green checks.

Attachment Type/File Name/Uploaded Date by Update User	Complete	Description		
Narrative 2_Specific Aims.pdf (Uploaded: 09/09/2010 13:49 by Tester07)	✓	document with science section	Remove	View
Other Hopkins_test_file.docx (Uploaded: 09/09/2010 13:50 by Tester07)	✓	letter	Remove	View

A narrative status can be changed from Complete to Incomplete, but this will negatively impact the final status of the proposal in the approval process.

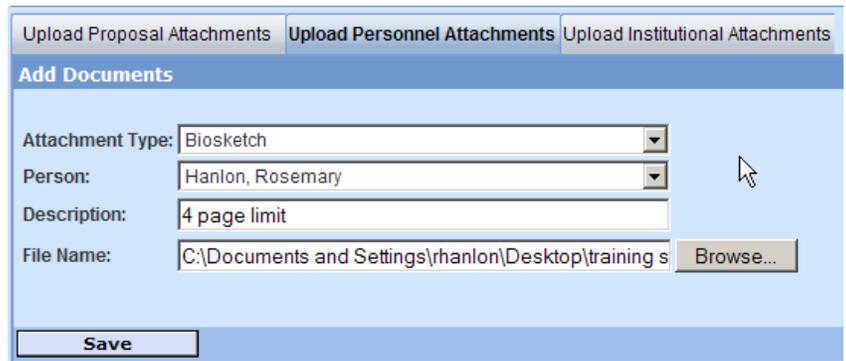
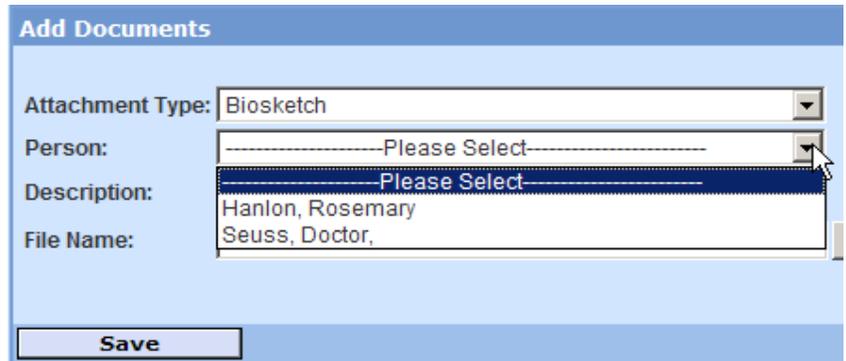


Upload Personnel Attachment instructions:

- **Select** the Personnel Attachment tab
- **Select** an *Attachment Type* from the drop-down list
- **Select** the Person relevant to the file being uploaded. (List generated from Investigators & Key Persons entries.)
- **Enter** a *Description* (required)
- **Select** Browse to find and upload your file

- **Select** Save 

Result: Person and file added to List of *Personnel Attachments*.

- **Select** **Remove** to delete the uploaded file and attachment type
- **Select** **View** to open the file in a new browser window

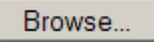


Repeat for all required Personnel and Personnel Narrative Attachment Types.

Refer to your sponsor opportunity or general submission guidelines for required uploads.

Files uploaded to Institutional Attachments are for internal UC use only. They are not submitted to the sponsor with the proposal. Please consult your Department BA or your [Authorized Official](#) for specific requirements.

Upload Institutional Attachment instructions:

- **Select** the Institutional Attachment tab
- **Select** an *Attachment Type* from the drop-down list
- **Enter** a *Description* (Required)
- **Select** Browse to find and upload your file 
- **Select** Save 

Result: Narrative added to List of *Institutional Attachments*.

- **Select** **Remove** to delete the uploaded file and attachment type
- **Select** **View** to open the file in a new browser window

Repeat for all required Institutional Attachments Types.

Refer to your department policy or submission preparation instructions for required uploads.

14. Navigate to Institutional Validations

Validate

Select **Validate** to check your proposal against any validation rules which will help you verify that your proposal is complete and ready to be submitted for approval. Review any messages that appear and verify that appropriate files have been uploaded, questions answered, etc.

Several categories of validations may be processed on your proposal:

Coeus Proposal Validations: Several fundamental items must be completed to route your application, such as:

- Answering all the Yes/No Questions
- Completing Mandatory Questionnaires
- Marking a budget Final and Complete
- Any department business rules applicable to UC's rules and regulations.

Coeus Budget Validations: UC's budget validation rules will be processed during this Validation.

Grants.gov Submission Validations: If your application is to be submitted electronically via Grants.gov and you've selected and saved a valid opportunity, the system-to-system (s2s) validation check will also be performed. Examples include:

- Missing a Budget (such as not selecting Modular on the Budget Summary)
- Missing Narrative uploads for mandatory forms (such as Biosketches for RR Key Person form)
- Missing eCommons User ID for NIH submissions

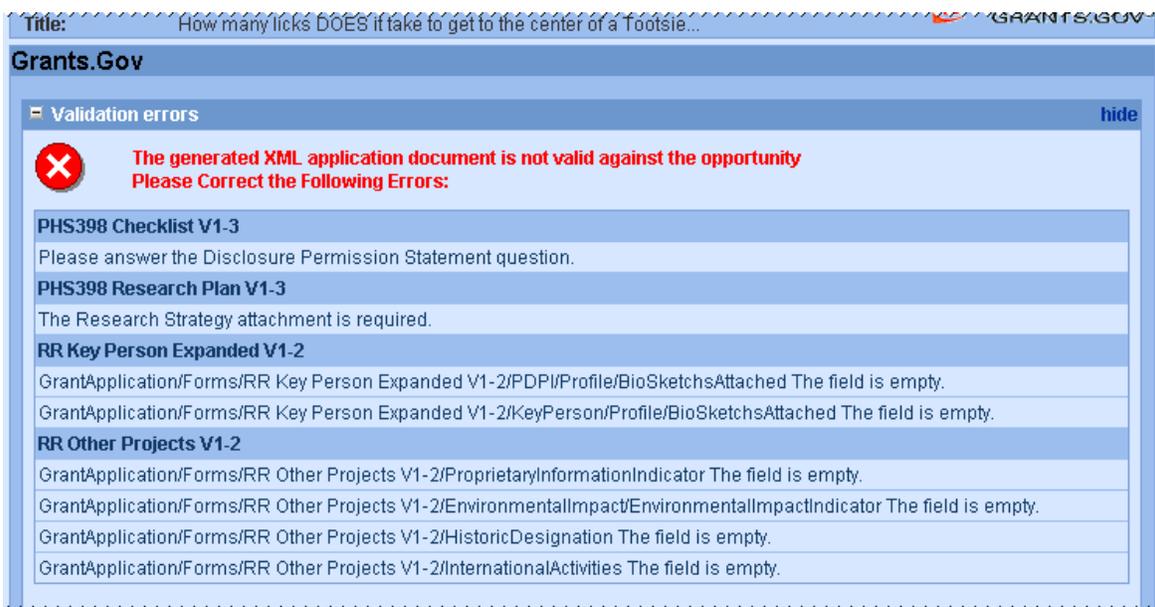
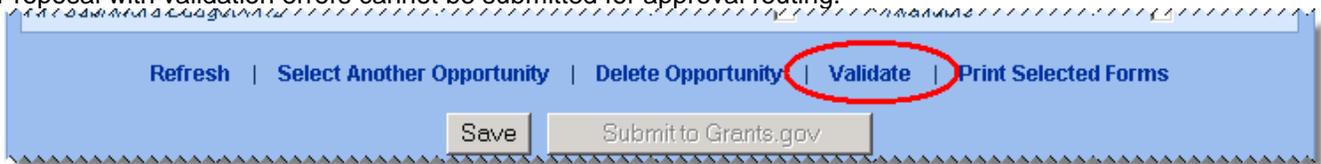
Make any corrections, additions, or changes as required and then perform the validation again. Once you pass the validations, you are ready to submit your application for approval routing.



Grants.gov Validations

Use the navigation button to open the Grants.gov panel.

- Click Validate to perform the Grants.gov s2s data validations.
- If all the data requirements are met, you will be able to submit the proposal for approval routing.
- If there are errors due to missing data or narratives, an alert message will present with a list of required corrections.
- Proposal with validation errors cannot be submitted for approval routing.



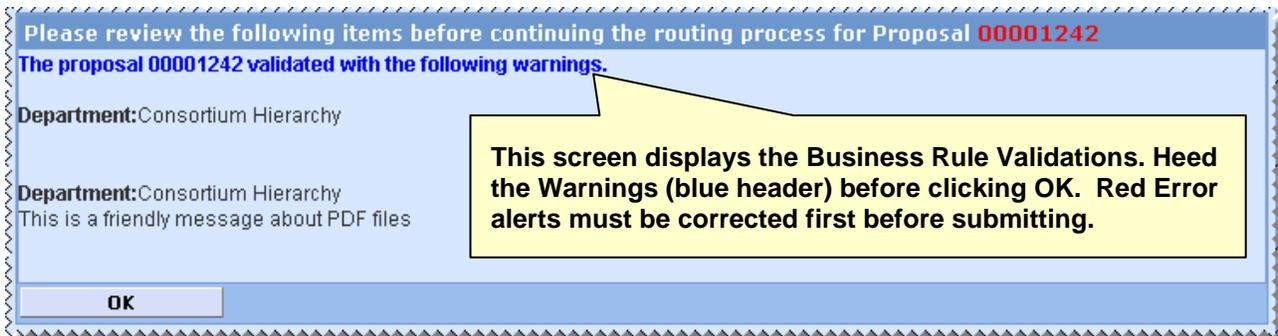
15. Navigate to Submit for Approval

Submit for Approval

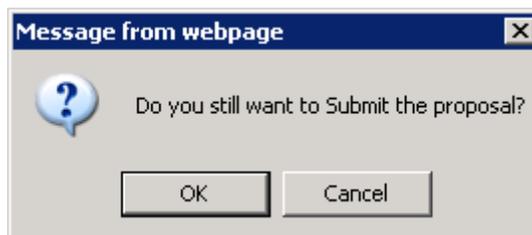
Select **Submit for Approval** when the proposal is **complete** (i.e., checked and validated) to begin routing for internal approval. The proposal must be complete for this process to begin. If it is not, Coeus will alert you to the non-compliant sections (i.e. Yes/No Questions unanswered, budget not marked final, etc.)

Before you try to submit:

- Finalize your proposal:
 - Mark your budget as **Final** and **Complete** on the **Budget Summary** screen
 - Navigate to the **Grants.gov** screen and select **Validate**;
 - Respond to any errors displayed – make the necessary corrections.
 - Return to the **Grants.gov** screen and **Validate** again. Repeat until the *Validations Successful* message is displayed.
 - Confirm that all mandatory questionnaires are answered.
- Click the **Submit for Approval** navigation button:
 - Read the validation report. If there are any errors, you will not be able to submit until they are resolved. If there are only warnings and all have been addressed, click **OK** to close the summary.



- To submit to routing, click **OK** in the message box. To return to the proposal without submitting, click **Cancel**.



- Click **OK** in the submission confirmation panel. You will be returned to the proposals General Info panel in **View Only** mode with the proposal in *Approval in Progress* status.

17. Recall an Approval in Progress Proposal



4.5 now allows the Proposal Aggregator to "Recall" a proposal that is routing for approval. This feature was added as an alternative to requesting the proposal be rejected. The feature was designed to allow the aggregator to remove a proposal from routing/approval because of a mistake, missing elements, etc.



User should alert the approvers at the current stop of their intent to recall as a professional courtesy in case an approver is actively reviewing the proposal.

To **Recall**, locate and open the proposal. Use the **Approval Routing** button on the left Navigation panel.

- **Click Recall**; the Add Comments screen will be presented.

The screenshot shows the 'Proposal Summary' page for proposal 00001435. The left navigation panel has 'Recall' highlighted with a red arrow. The main content area shows proposal details: Investigator: Shavell, Eleanor; Agency/Sponsor: 000340 : NIH; Proposal #: 00001435 (Approval In Progress); Proposal Period: 09/01/2011 - 08/31/2016; Title: Approval review: Fellowship Supplement 1-2 - Senior Fellow. Below this is a section for 'Department Required for Proposal Approval' and a list of approvers, including '(000001) NIH Coordinator'.

- In the Comments section, Type in the reason for recalling the proposal.

The screenshot shows the 'Add Comments' screen. It includes the same proposal details as the previous screenshot. Below the details is a large text area for 'Comments:'. At the bottom of the screen are two buttons: 'Recall' and 'Back'.

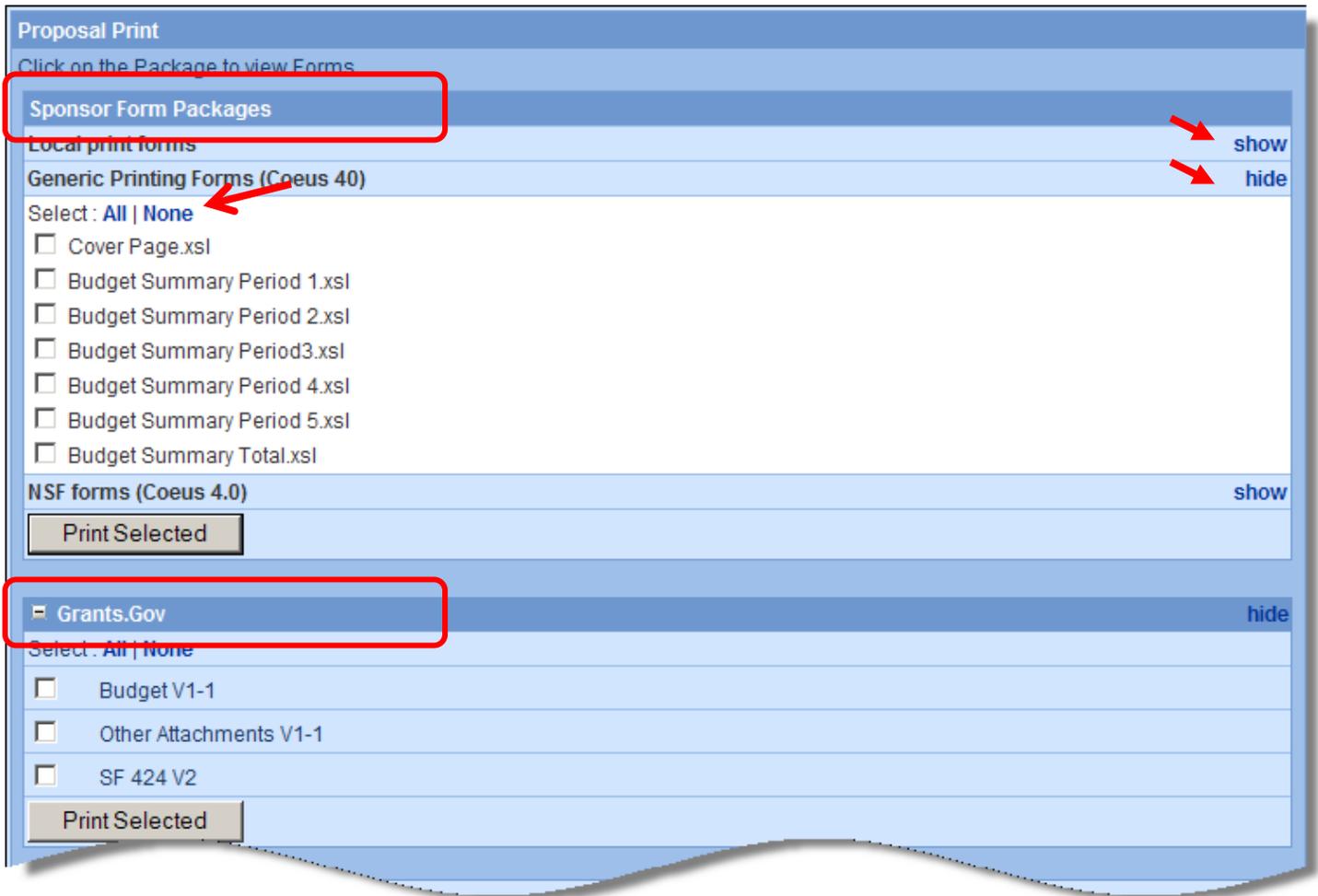
- **Click Recall**, or click **Back** to cancel the recall.
- **Click Yes** in the confirmation window or click cancel to return to the comments screen...
- The proposal status is changed to **Recalled** and is now completed editable.

16. Navigate to Print

Print

Select **Print** to open the print options screen

- **Sponsor Form Packages** are for paper submittals
 - Select **Show** or **Hide** to expand the available forms
 - Select **All** to check all the forms available in the displayed group; **None** to deselect; or select individual forms.
- **Grants.gov** are the Grants.gov forms for s2s submissions (marked to Include on the Grants.gov window).
 - Select **Show** or **Hide** to expand the available forms
 - Select **All** to check all the forms available in the displayed group; **None** to deselect; or select individual forms.
 - Select **Print Selected** to print. A new browser window will open to display your PDF document.



17. Navigate to Copy Proposal

Copy Proposal

Copying an existing proposal is especially useful for preparing a Grants.gov Change/Corrected, or for updating and resubmitting a similar work to the same or another sponsor:

From **My Proposals** or **Search** – Find the proposal you want to copy



You must have the **Aggregator Role** in the original proposal to copy all Narratives and Budget.

Select the proposal **title** to open the proposal

Select **Copy** from the left navigation bar

If you are authorized to create proposals in more than one Unit, you will be prompted to **select a Lead Unit**.

When the next screen appears:

Copy Budget
 Copy All Budget Versions
 Copy Final Version Only
 Copy Attachments
 Copy Questionnaire

Copy Proposal

Active checkboxes have white backgrounds meaning there is something available to copy. If the box is gray, it means there is nothing in the original proposal to copy.

Select to copy Budget – Click the checkbox if you wish to copy budget details. Once selected, choose to copy **all** budget versions or **only** the budget version marked as **Final**.

Note: if you select **Final Only**, and no budget marked as final, no budget will be copied to your new proposal.

Select to copy Attachments –To copy the uploaded proposal narratives and institutional attachments. The Proposal Personnel Attachments will always be copied (Biosketch, C&P, etc.).

Select to copy Questionnaire (if appropriate – you should review to revise your responses as needed.)

New Red Alert if the source proposal includes a linked Grants.gov opportunity

This proposal copy will include a linked Grants.Gov opportunity. Use the 'Delete Opportunity' option in the Grants.gov screen/window of the copied proposal to remove an invalid/expired opportunity.

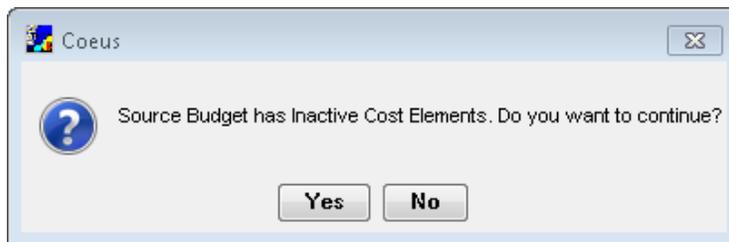
Copy Proposal



Review any warnings regarding Appointment Types, Period Types, or Cost Elements.

A warning will appear if any of these have been made inactive but are present in the selected budget. You will be required to remove inactive elements or select a valid alternative.

This warning will occur if a budget person has an Appointment or Period Type that has been made inactive. You may continue with the selected budget, or click 'No' and opt to create a new budget.



Your Copied Proposal will be created and appear on My Proposals screen – the highest proposal number on your list. **Return to My Proposals** to open the copied proposal.



When the **Copy Proposal** option includes **Copy Narratives**, Coeus will copy all the attachment types and uploaded files. **These copied attachment types will only be valid for re-use as a system-to-system (s2s) submission if the copied proposal links to the same or similar Grants.gov opportunity.** If the user navigates to Upload Attachments, all of the copied types – even Grants.gov opportunity specific - can be viewed and maintained *prior* to linking the newly copied proposal to a valid Grants.gov opportunity.



Update your Copied Proposal elements!

1. Adjust the start and end dates to meet your new submission requirements, if necessary.
2. Link to the Grants.gov opportunity and forms (the CFDA and/or Funding Opportunity Number info will copy, but you still need to complete the link).
3. Verify that any copied narrative types are still appropriate.
4. Adjust the budget period boundaries to reflect the new dates.
5. Review the rate tables, syncing the rates if necessary.
6. Investigator Certifications do not copy with the proposal. If you are making a copy of a proposal because there were changes or corrections to be made, such as an NIH change/corrected submission, AND the PI certified the original proposal, then you will need to use the proxy certification. **UC policy allows proxy certification only when the PI certification was obtained on a previous version of the same proposal.** You will be directed to a new form to complete so you can route the copied proposal. You will need to explain why you are proxy certifying the proposal and indicate the proposal number with the original PI certification. Be sure to answer the questions the same as the PI answered originally.

Investigators/Key Study Personnel Details
Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.
Unit is required for Investigators.
Key Person Role is required for Key Personnel.

[Employee Search](#) | [Non Employee Search](#)

Name: Email: Phone:
 Agency Credentials: Fax: Mobile:
 Unit: [Search](#)
 Proposal Role: Multi PI % Effort:
 % Academic Year Effort: % Summer Year Effort: % Calendar Year Effort:

List of Investigators/Key Study Personnel **COI Disclosure Status**

Name	Department	LU	MPI	Role	% Effort				Certify	
					T	A	S	C		
Carole H Donnellon	<ul style="list-style-type: none"> • COM Internal Medicine • RES SRS Electronic Research 	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	<input checked="" type="checkbox"/> Detail
Ketaki Ashute...				Collaborator	0.0				Remove	Details

When Copied Proposal Narratives require special attention:

For example: NIH modified their research plan narrative requirements for submissions after January 25, 2010. Therefore, a copy of an NIH R01-style proposal submitted prior January 25, will contain all the narrative types used in the previous submission – several of these types have been retired and replaced by a single narrative. When the valid Grants.gov opportunity is linked, the user should review the current sponsor requirements and add the required narrative type for the new submission. While the extra (copied) narrative types & files won't be transmitted to the sponsor, it is advised that the user delete the narratives that are no longer relevant to avoid confusing the internal reviewers.

18. Navigate to Email: Send Email Notifications from your proposal.

Email

Navigate to Email

- Select [Add Employee](#) to search the Coeus Person table HR data.
- Select [Add Non Employee](#) to search the Rolodex.
- Select [Add Role](#) to select a pre-defined approver on your Routing Map.

Selected person(s) will be inserted on to the *To:* line to receive your message

Enter a subject in the Subject line field provided.

Enter a message in the text box provided.



TIP: Include your name & email address in the Message content. The generated notification comes from the Coeus Application, not your personal email account.

Select Send. **Send**

Coeus will send an email notification to the recipient(s) email inbox (not Coeus inbox).

19. Navigate to Add New Rolodex Entry

Add New Rolodex Entry

The Coeus Rolodex is used to maintain contact and organization information for people you want to include in your proposals that are not in UC's HR system. Whenever you search for non-personnel, you search in the Rolodex. Collaborators from other universities or research organizations, consultants, new hires that have been identified but not yet added to the HR system are just a few examples of persons that would need to find in the Rolodex. Once a Coeus rolodex entry has been created, it stays in the database and is available for quick and easy entry in any proposal.

Navigate to Add New Rolodex Entry

Enter the required fields

The following fields must be present for use in Grants.gov submissions. Once Rolodex entries are created, they are available to ALL Coeus users – so even if your submission is NOT Grants.gov, please fill in all these fields.



ONLY use **letters** (uppercase/lowercase A-Z, a-z), **numbers** (0-9), **hyphens** (-) and **underscore** (_). Special characters like an umlaut (ü) will cause an error in transmission to Grants.gov. Even **spaces between characters can cause problems** for sponsors retrieving files from a successful Grants.gov submission!

- **Name**
(Last and First),
- **Address** (street address on the first line; other lines are optional),
- **City**
- **State**
- **Postal Code**
- **Country**
- **Phone,**
- **E-Mail**
- The default status is **Active.**

Select **Save**

After saving, you'll be provided with the new Rolodex ID:



You must have authorization to create Rolodex entries. Contact your Department BA, or the Coeus Help-desk at Coeus@uc.edu to create the Rolodex entry for you.

20. Navigate to Show Approval Routing (available after submitted for approval)

Approval Routing

Locate the submitted Coeus proposal in My Proposals

Select Approval Routing

The routing path for the proposal is displayed, with the approval status displayed.

Department Required for Proposal Approval

Below is the list of the Approvers who are required to approve this proposal before it may be submitted to the agency.

NIH Coordinator			Show
Firestone Map (Team C)			Show
Ronald proposal map			Hide
	Hasseltine, Ronald E	To be submitted	
All Proposals Biology			Hide
	Susan Geswein	Waiting for approval	
	Foster, Mary T	Waiting for approval	
	Amy Wright	Waiting for approval	
	Salie, Alison M	Waiting for approval	

[Hierarchy](#)

[Hide Legend](#)

Primary Approver	Alternate Approver	Approved	Bypassed
Approved by other	In progress	Passed	Rejected
To be submitted	Waiting for approval	Delegated	

Select **Show** to expand the approval box

Select **Hide** to minimize the approval box

Select **Hierarchy** to see the Approval Map Hierarchy view.

Select **Hide Legend** to hide the panel of legend icons.

Approval Status

Approval Route

- [-] NIH Coordinator
 - [-] Stage 1
 - Dowdy, Stephen D
 - Barrett, William J
 - Firestone, Kallie
 - Robert Yetter
- [-] Firestone Map (Team C)
 - [-] Stage 1
 - Firestone, Kallie
 - Ponting, Jennifer A
 - Barrett, William J
 - Caissie, Priscilla A
 - Hanlon, Rosemary
 - Alajajian, Amy E
 - Augustine, Lauren
- [-] Ronald proposal map
 - [-] Stage 1
 - Hasseltine, Ronald E
- [-] All Proposals Biology
 - [-] Stage 1
 - Susan Geswein
 - Foster, Mary T
 - Amy Wright
 - Salie, Alison M

21. Navigate to Proposal Summary screen

Proposal Summary

The Lite Approval Summary screen provides approvers with details and print access on the Summary page, reducing the need to navigate to the proposal record and back again to the summary to approve. From the Summary page, the user will see all the relevant information for the proposal and be able to drill down into more specific proposal data.

Navigation to the Proposal Summary Screen:

Via the Proposal Details window: Click on the Proposal Summary Navigation button.

Via Inbox: Users will click in the [inbox] button in the menu bar and select any of the proposals that are waiting for approval. These actions will immediately open the Proposal Approval Screen.

Via Approval Routing: Users will select a proposal and click in the [approval routing] button on the left hand side menu bar. Once in the approval routing page, select the [Proposal Summary] button

The default view in each section is expanded, however, they can be collapsed but hitting the minimize box or the [hide] button.

Proposal Summary Section:

The proposal Summary provides general data for the proposal. The top part shows the investigator, sponsor, title of the proposal, proposal number and proposal period. The bottom part gives a snapshot of the Budget totals, including direct cost, indirect cost, under-recovery, cost share, total cost and budget period.

The default view in this section is expanded, however, it can be collapsed by hitting the minimize box or the [hide] button

Proposal Summary						Hide
Investigator:	Hanlon, Rosemary		Proposal # :	00001437 (Approval In Progress)		
Agency/Sponsor:	000500 : NSF		Proposal Period:	01/01/2011 - 12/31/2015		
Title:	Approval Review: NSF PD-98-1391Mentoring, 5Y Big Budget & sub...					
Budget Total						
Direct Cost	\$2,796,182.16	Indirect Cost	\$962,153.88	Total Cost	\$3,758,336.04	
Under Recovery	\$0.00	Cost Share	\$0.00	Period	01/01/2011 - 12/31/2015	

Budget Summary

The Budget Summary displays two sub-sections: the Budget Period and the Budget Report.

Budget Summary								Hide
Budget Period								Hide
Period	Start Date	End Date	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost	
1	01/01/2011-	12/31/2011	\$1,502,426.42	\$194,599.97	\$0.00	\$0.00	\$1,697,026.39	
2	01/01/2012-	12/31/2012	\$310,617.49	\$183,169.90	\$0.00	\$0.00	\$493,787.39	
3	01/01/2013-	12/31/2013	\$319,288.19	\$189,065.97	\$0.00	\$0.00	\$508,354.16	
4	01/01/2014-	12/31/2014	\$327,629.34	\$194,737.95	\$0.00	\$0.00	\$522,367.29	
5	01/01/2015-	12/31/2015	\$336,220.72	\$200,580.09	\$0.00	\$0.00	\$536,800.81	
Budget Report								Hide
Budget Summary by Period Cost Sharing Summary by Period Cumulative Budget Industrial Budget by Period								

The Budget Period shows the number of periods in the proposal and provides a snapshot of the budget for each of the periods. It shows the start and end date of the period, direct cost, indirect cost, under-recovery, cost sharing and total cost for the period.

The Budget Report lists the available budget reports for the proposal. When the user clicks in a report the report opens up to shows the details.

Attachments

The attachments section displays a list with all the files attached to this proposal. When the user clicks “view” the attachment opens as a PDF. The attachments can be printed using the print button of the PDF file. This section is a snapshot of the “upload attachments” tab in the proposal details screen.

The default view in this section is expanded, however, it can be collapsed by hitting the minimize box or the [hide] button.

Attachments		Hide
Type	Description	
Narrative	Complete	View
ProjectSummary	Complete	View
Facilities	Complete	View
Other - Mentoring Plan.pdf	Complete	View
BudgetJustification	Complete	View
Bibliography	Complete	View
Equipment	Complete	View

Special Review

The special Review section shows any special reviews of this proposal. The header of this section identifies the proposal number. The body of this section provides the type of review, the approval status, protocol number (if any), the application date, the approval date and any comments added to the special review. The comments are visible by clicking in the “view” button.

The default view for the special review section is expanded, however, it can be collapsed by hitting the minimize box or the [hide] button.

Special Review [Proposal No. - 00001437]						Hide
Special Review	Approval	Protocol No	Application Date	Approval Date	Comments	
Animal Usage	Pending		08/01/2010			View

List of Investigators/Key Study Personnel

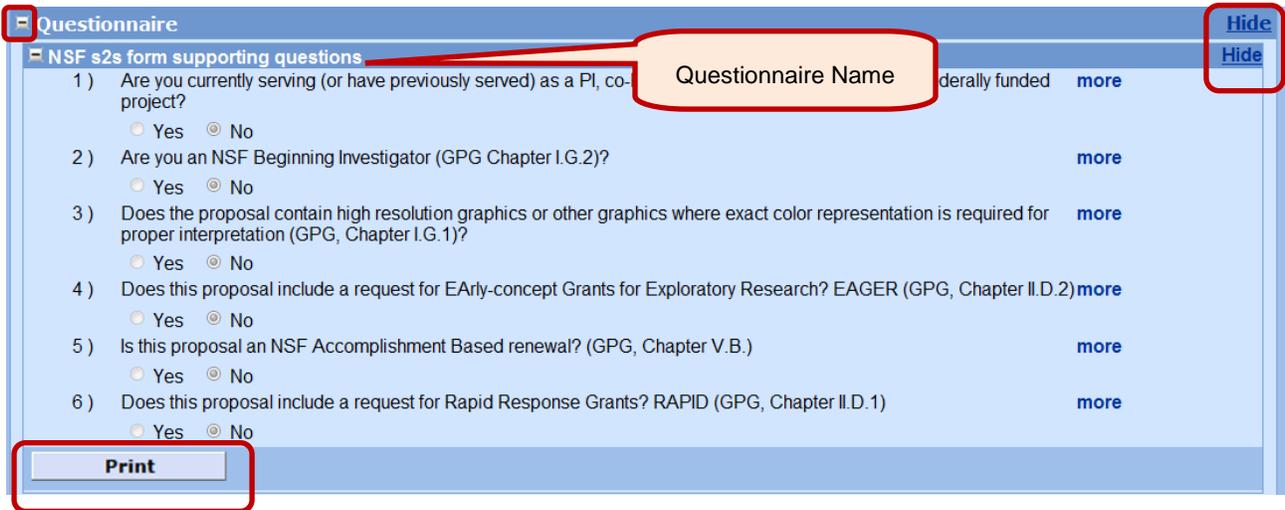
The list of investigators/key study personnel displays the PI, Co-PIs and Key persons listed in the proposal. The body of this section provides the following personnel information: Names, departments, the lead unit, roles and it also notes if the person is a multiple PI (co-investigator). The certify button allows the user to view the certification questionnaire. The “X” or the checkmark shows if the personnel have been certified or not.

List of Investigators/Key Study Personnel						Hide
Name	Department	LU	MPI	Role	Actions	
Hanlon, Rosemary	• Massachusetts Institute of Technology	<input checked="" type="checkbox"/>		Principal Investigator	Not Certified	Certify X
Dowdy, Stephen D				Director Electronic Research Administration		Certify X

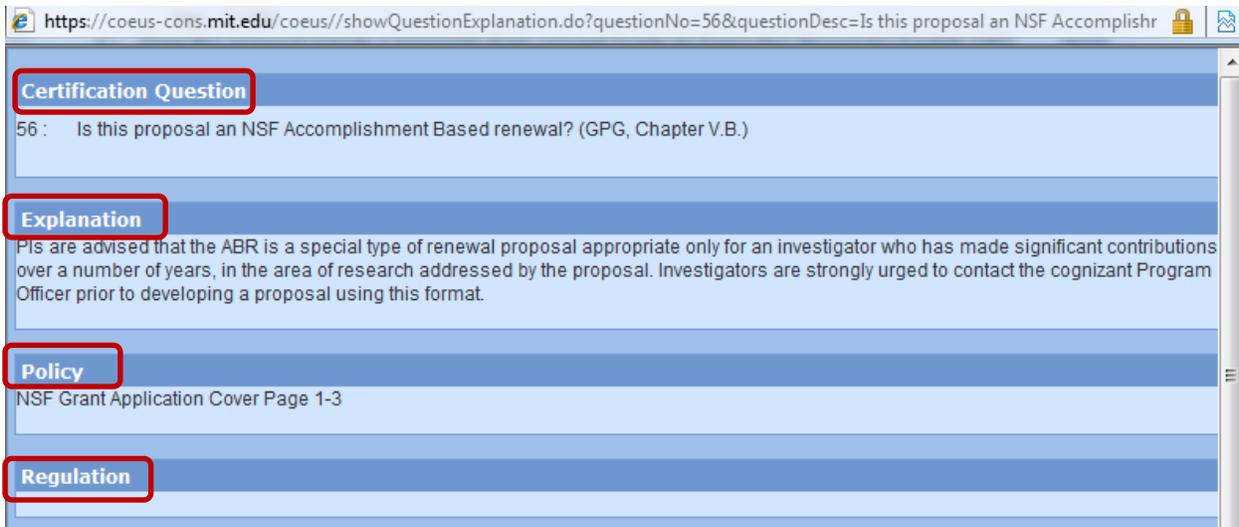
The default view for the list of Investigators/key study personnel section is expanded, however, it can be collapsed by hitting the minimize box or the [hide] button.

Questionnaire

The questionnaire section shows the questionnaires completed when writing the proposal. This section displays the name of each questionnaire and its answers. The “print” button will provide the questionnaire in a printable PDF file format. The default view for the questionnaire section is expanded, however, it can be collapsed by hitting the minimize box or the [hide] button.



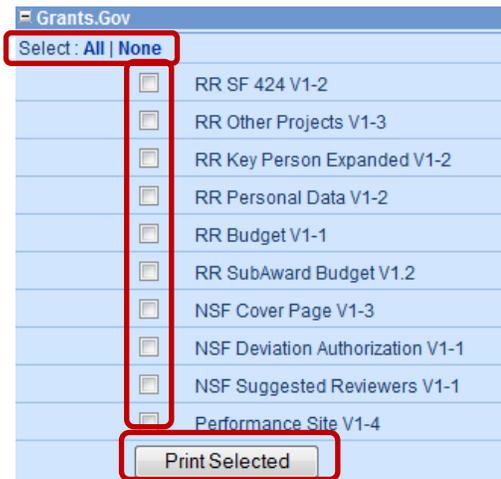
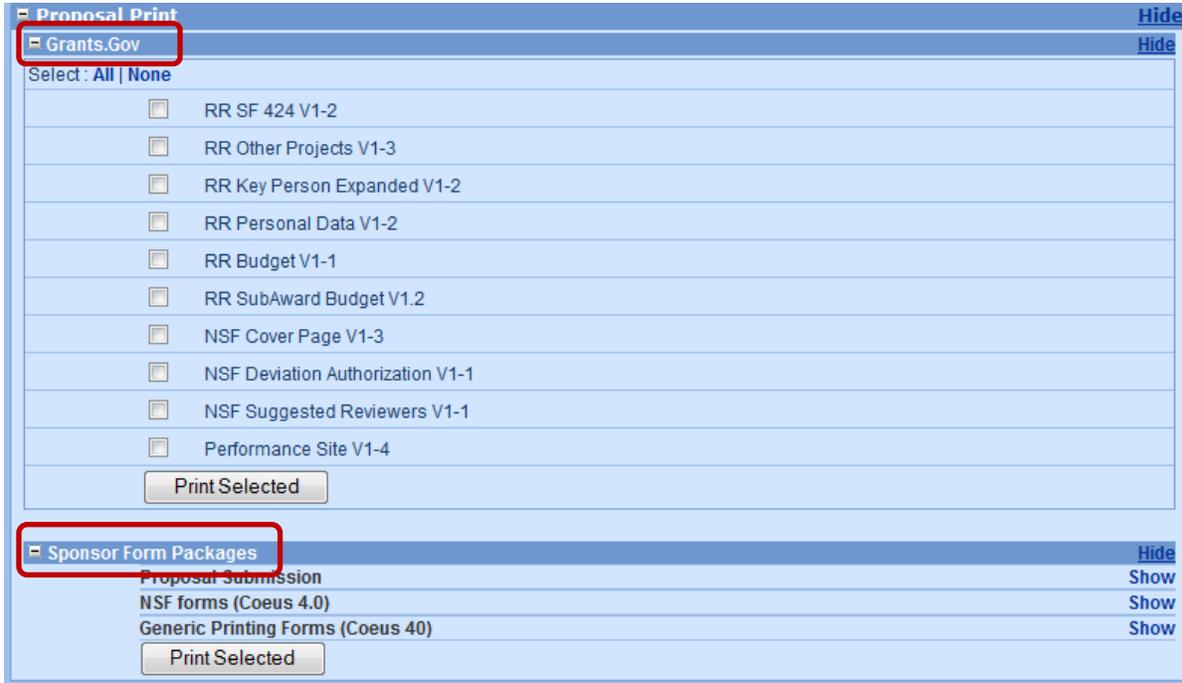
The “more” button opens the question functionality and provides the question, a brief explanation of the meaning of the particular question, the policy and regulation that applies to it.



Proposal Print

The proposal print section provides a quick look at all the attachments provided to grants.gov and other sponsor forms attached to the proposal. The proposal print section is organized in two separated areas:

- Grants.Gov
- Sponsor Form Packages



The Grants.Gov area displays the forms that linked to the proposal from Grants.Gov. This data feeds from the “Grants.gov” tab in the proposal detail screens.

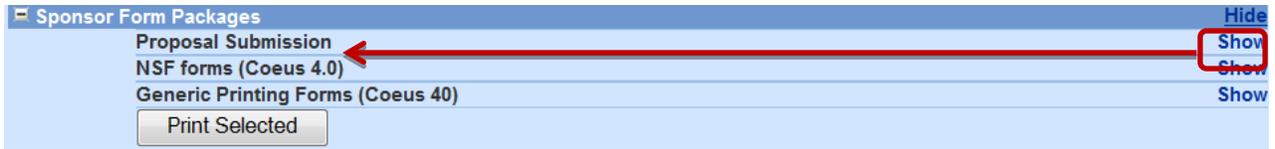
The user can pick the form that they want to review by ticking the box next to it or ticking any and all of the boxes at the same time. When hitting the “Print Selected” button, a PDF version of the form/s selected will open, allowing the user to review or print the form/s. The “select: All/None” buttons allow the user to select or de-select all the boxes at once.

The grants.gov area is expanded by default, but it can be collapsed by clicking the minimize box or the [hide] button.

This section shows up when the proposal is linked to grants.gov

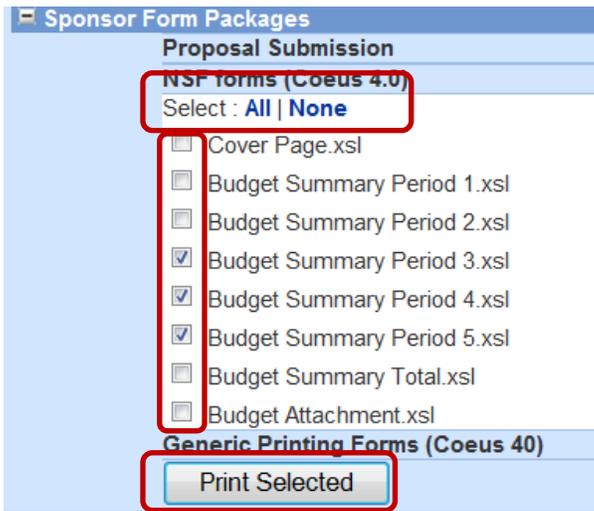
The Sponsor Form Packages area is a summary of the Sponsor forms displayed in the print tab of the proposal detail screen. This area contains three categories:

- Proposal Submission – Shows the school internal forms for routing and submission of the proposal.
- Generic Print Forms – Shows the generic budget forms for the sponsor and its cover page.
- Sponsor Specific Forms – Shows the specific form packages of the sponsor. If the sponsor is NSF, it would show NFS specific form packages. If the sponsor in NIH, it would show NIH specific form packages and so on. This section would not show if the sponsor doesn’t have any specific form packages. The sponsor may have more than one specific form package. In this scenario, each package will be displayed as its own category.



The “show” button will open a menu that displays all the forms for each package category. From this view, the user can pick the form that they want to review by ticking the box next to it or ticking any and all of the boxes at the same time. When hitting the “Print Selected” button, a PDF version of the form/s selected will open, allowing the user to review or print the form/s.

The “select: All/None” buttons allow the user to select or de-select all the boxes at once.



21. Check on the Grants.Gov Submission Details status:

Grants.Gov

Submission Details (Refresh) hide

Received Date: 2008-06-05 15:32:14.0
 Last Modified Date: 2008-06-05 17:57:56.0
 Submission Status: Agency Tracking Number Assigned
 Grants Tracking Id: GRANT00471289
 Agency Tracking Id: 3082819

Notes: Agency received proposal and assigned tracking id

Attachments

- M-9_PHS_ResPlan_ResearchDesignMethods
- M-16_Narrative
- M-7_PHS_ResearchPlan_ResourceSharingPlans
- M-3_Equipment
- M-6_ProjectSummary
- M-5_PHS_ResearchPlan_LettersOfSupport
- M-10_PHS_ResPlan_BackgroundSignificance
- ID-926511110_BN-1_BIOSKETCH
- M-18_PHS_ModBud_PersonJustif
- M-17_PHS_ResearchPlan_SpecificAims
- M-20_Bibliography
- M-2_Facilities
- M-13_PHS_ResearchPlan_ProgressReport
- M-1_PHS_Cover_Letter

- **Locate** the submitted Coeus proposal in **My Proposals**
- **Select Grants.gov**
- **Select Refresh** from options at the bottom of this screen to update the data

Items on this screen:

Received Date:	This is timestamp for your submittal being processed into Grants.gov.
Last Modified Date:	This displays the most recent refresh timestamp. Coeus refreshes submittals on an ongoing basis until the submission process is complete. Users can refresh manually.
Submission Status:	Data provided back by Grants.gov. Not all sponsor supply data back via Grants.gov.
Grants Tracking Id:	The Grants.gov tracking number
Agency Tracking Id:	Agency-assigned tracking number – not all agencies provide data back via Grants.gov.
Notes:	Information provided by Grants.gov.
Attachments:	List of all uploaded documents submitted.

Appendix A: Cost Elements Used in Proposal Development at UC

Code	Description
530900	Advertising and Development
533111	Alterations and Renovations
AWOHOF	Award Budget F&A Costs - Off Campus
AWOHON	Award Budget F&A Costs - On Campus
AWEBOF	Award Budget Fringe Costs - Off Campus
AWEBON	Award Budget Fringe Costs - On Campus
531400	Communications
530311	Computer Consulting Services
533101	Consultants
530200	Dept Operating Expenses
539000	Equipment less than \$5000 (subject to F&A)
549100	Equipment, Capital -- value over \$5000
EXPFTFED	Ex Staff FT - Federal Fringe Rates
EXPFTNON	Ex Staff FT - Non Federal Fringe Rates
EXPPTFED	Ex Staff PT - Federal Fringe Rates
EXPPTNON	Ex Staff PT - Non Federal Fringe Rates
FAEFTFED	Fac (non A,AUP) FT-Fed Fringe
FAEFTNON	Fac (non A,AUP) FT-Non Fed Fringe
FAEPTFED	Fac (non A,AUP) PT-Fed Fringe
FAEPTNON	Fac (non A,AUP) PT-Non Fed Fringe
FACFTFED	Faculty FT - Fed Fringe Rates
FACFTNON	Faculty FT - Non Fed Fringe Rates
FACPTFED	Faculty PT - Fed Fringe Rates
FACPTNON	Faculty PT - Non Fed Fringe Rates
520100	Fringe Benefits
STUGSFED	Grad Student - Fed Fringe Rates
STUGSNON	Grad Student - Non Fed Fringe Rates
530101	Honorarium
523000	In State Tuition
585000	Inst. Allowance NRSA Fellowship
532000	Lab Animal Medicine
531900	Lab Expenses
532502	Office and Classroom Rental
533501	Patient Care
POSTDFED	Post Doc Fellow - Fed Fringe Rates
POSTDNON	Post Doc Fellow- Non Fed Fringe Rates
531000	Postage & Delivery
530318	Programming Services
531201	Publications
531913	Radiation Safety -- Film Badges
531914	Radiation Safety -- Waste Disposal
550500	Resident Trainee Stipends
532201	Subawards Direct -- subject to F&A
532202	Subawards Direct-- not subject to F&A

Code	Description
SUBFAGT	Subawards F&A - No F&A
SUBFALT	Subawards F&A - Subject to F&A
500000	Summary Budget
SUPFTFED	Support Staff (hrly) FT - Fed Fringe Rates
SUPFTNON	Support Staff (hrly) FT - Non Fed Fringe Rates
PHTD01	Total Direct Cost for Proposal Hierarchy
PHTID02	Total Indirect Cost for Proposal Hierarchy
530505	Travel - Foreign
530800	Travel - Trainee
530500	Travel - domestic
550100	Tuition
531600	UCit UCNET Usage
STUUGFED	Undergrad Student - Fed Fringe Rates
STUUGNON	Undergrad Student - Non Fed Fringe
535000	Utilities

Appendix B: Abbreviations Used in This Guide

Abbreviation	Description
BA	Business Administrator
F&A	Facilities & Administration (also known as IDC)
GA	Grant Administrator
IDC	Indirect Cost (also known as F&A)
OH	Overhead
OSP	Office of Sponsored Programs (known as SRS at UC)
PI	Principal Investigator
s2s	System-to-System
SRS	Sponsored Research Services
YNQ	Yes/No Questions