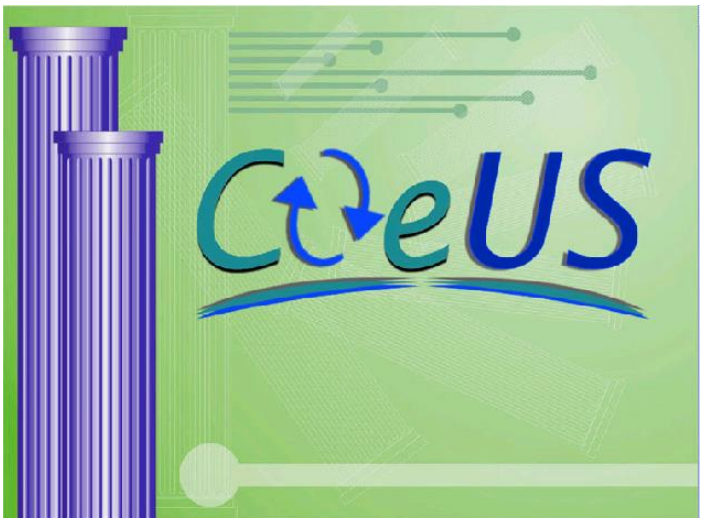
Coeus Premium

Proposal Development

User Guide



Coeus 4.5.1®

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

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About the Proposal Development User Guide

The Proposal Development User Guide provides step-by-step instructions for creating a proposal in Coeus Premium Version 4.5.1. This guide is divided into eight chapters and five appendixes, as described in the following table.

Chapter	Description
Before You Begin	How to obtain the proposal creator role and log in and an overview of the proposal development process.
Creating the Proposal	The first steps of creating a proposal.
Creating the Budget	How to create a budget.
Uploading Narratives	How to handle the documents created outside of Coeus that are required for proposal submission.
Linking Proposals in a Hierarchy	Instructions for creating an optional hierarchy of proposals.
Completing the Proposal	The final steps required before routing the proposal for approval.
Submitting the Proposal for Approval	The process of routing the proposal for approval.
Other Coeus Functions	How to use such functions as Medusa and Notepad.
Appendix: Searching in Coeus Premium	Instructions for conducting a search.
Appendix: Cost Elements at UC	List of cost elements available for proposal development.
Appendix: Abbreviations	Abbreviations used in this guide.
Appendix: Tips	Tips for using Coeus Premium.
Appendix: Budget Summary Report Samples	A sample of each type of budget report Coeus creates.

Conventions Used in This Guide

These typographical conventions are used throughout this guide.

Item	Convention	Example
User input	Bold	Enter: ***lastname***
Menu and item name	Bold, separated by ">"	Select **Edit > Persons**
Toolbar icon name	Italic, with a picture of the icon	*Budget Persons* icon
Screen, window, or tab name	Small caps	DEVELOPMENT PROPOSAL LIST screen
Field, checkbox, option icon, or key name	bold	**Proposal No.** field

Coeus Access and the Proposal Creator Role

To create proposals in Coeus, you need access to Coeus with the proposal creator role.

If You Do Not Have Coeus Access or You Have View-Only Access

Contact Sponsored Research Services (SRS) at coeus@uc.edu to gain access to Coeus or to upgrade from view-only access to the proposal creator role. See http://www.uc.edu/coeus.html for current training opportunities and access requirements.

You will use your UC central ID to log into Coeus (see *Logging In to Coeus Premium*).

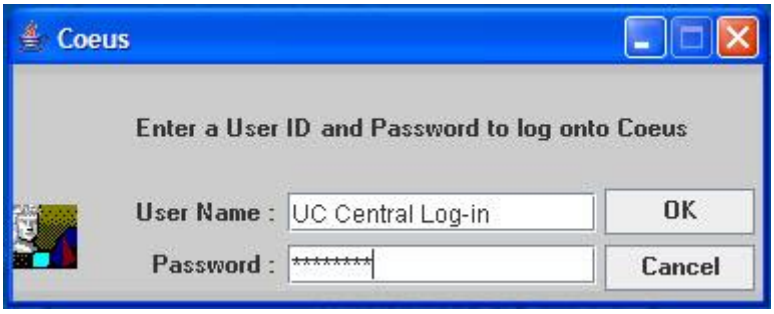
If You Have Used Only CoeusLite

- Go to: https://coeus.uc.edu/coeus/CoeusWebStart.jsp
- Click on “Launch Coeus Premium”
- This should install files and then prompt for login screen. If installing Coeus for first time the application might require following setup as well: - On the Security Warning screen select START - On the Desktop Integration Process screen, select “YES” to install a shortcut to Coeus on your desktop.
- If the above does not work try installing Java from below link and try the above again. http://www.oracle.com/technetwork/java/javase/downloads/index.html
- Contact coeus@uc.edu if there are any questions.

Logging In to Coeus Premium

Click the Coeus Premium icon on your desktop. The Coeus Premium page opens.

Click the Launch Coeus link for your operating system. A login window opens.

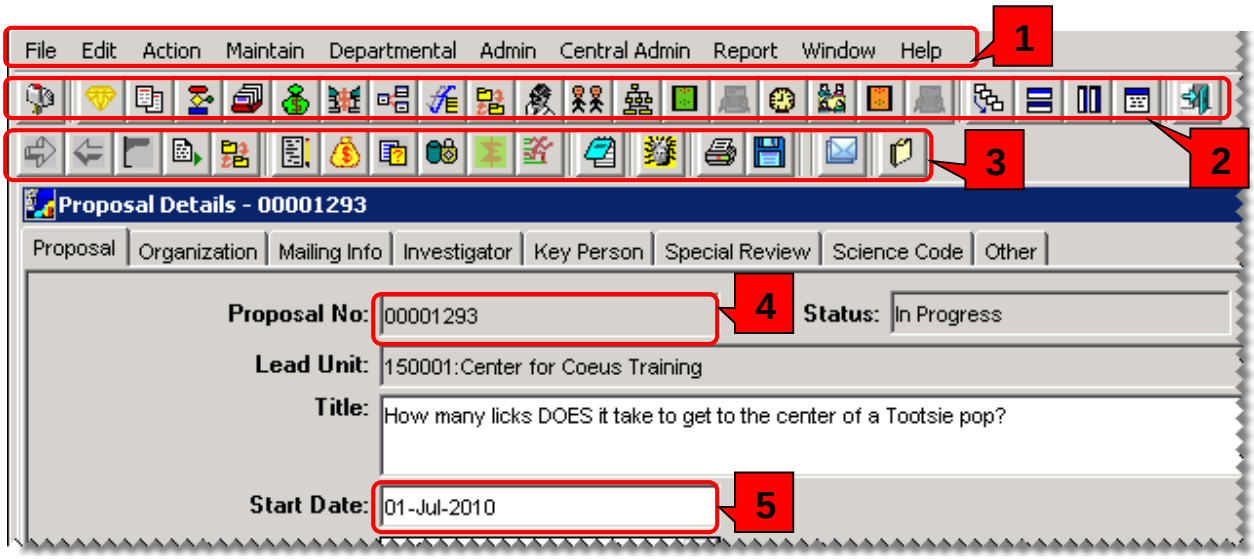


Enter your username (UC Central ID – sometimes referred to as “6+2”) and password. Click **OK**.

You may be prompted to install the fast-launch option (a desktop icon). Click **Yes** to install the icon, or **No** to close the window without installing.

Coeus Interface

Elements of the Coeus interface are called out in the illustration and described in the table that follows.



Element	Description
❶ Menu bar	The menus and their content change depending on the screen that has focus.
❷ Top toolbar	The top row of icons is always the same.
❸ Second toolbar	The second row of icons changes depending on the screen that has focus.
❹ Read-only field	Read-only fields have a grey background
❺ Read/write field	A field that you can enter data in has a white background. Some of these fields are required, while others are optional. Required fields are indicated in this guide

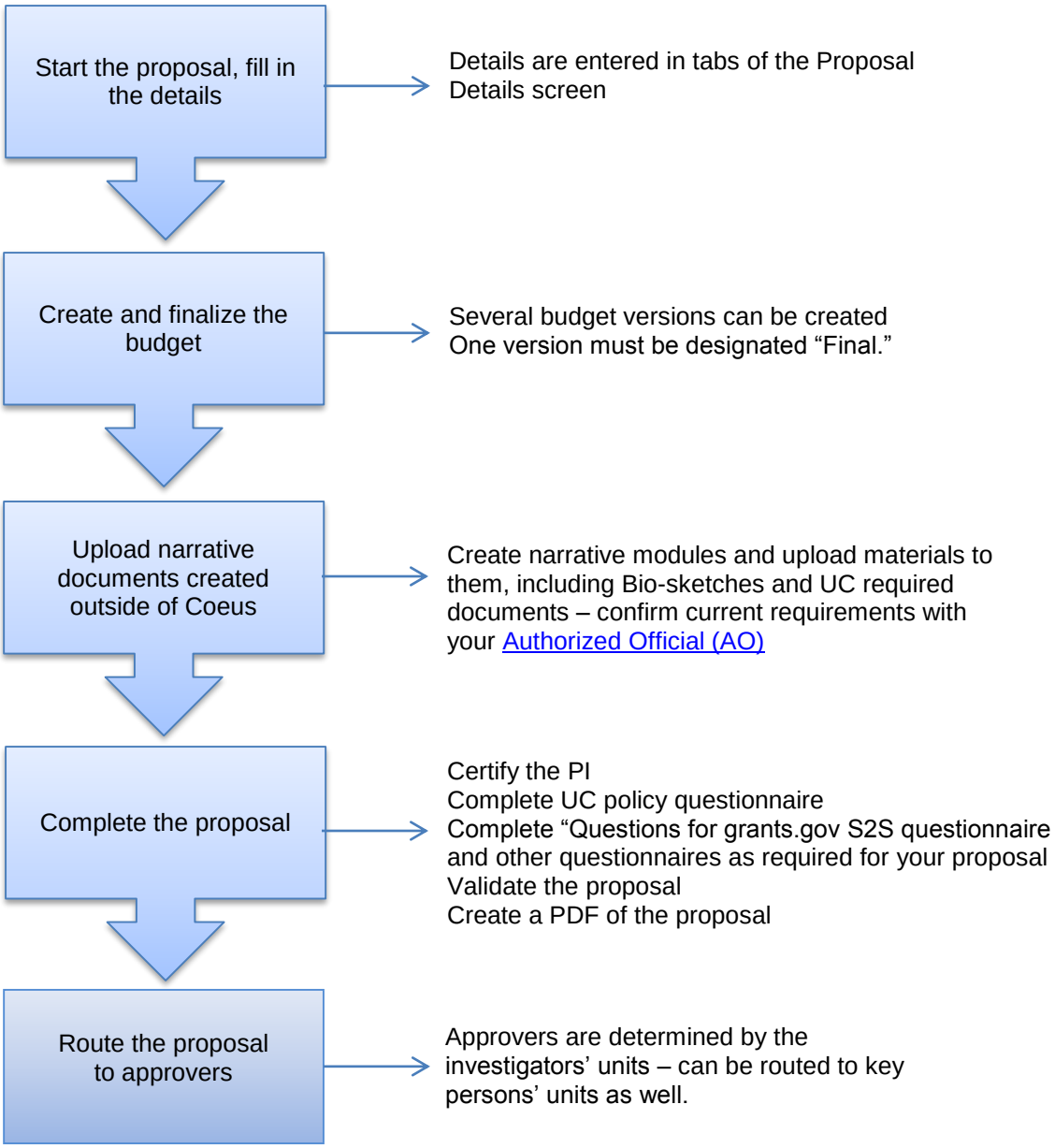
Managing Screens

The top toolbar has four icons that control how open screens are displayed. In addition, the second toolbar has an icon that closes the current screen, and the top toolbar has one that exits the application.

Icon	Function
Cascade	Cascade all open screens; title bars are visible.
Tile Horizontal	Arrange all open screens horizontally.
Tile Vertical	Arrange all open screens vertically.
Layer	Maximize all open screens and arranges them one on top of another.
Close	Close the screen that has focus.
Exit	Exit Coeus.

Overview of Proposal Development Using Coeus Premium

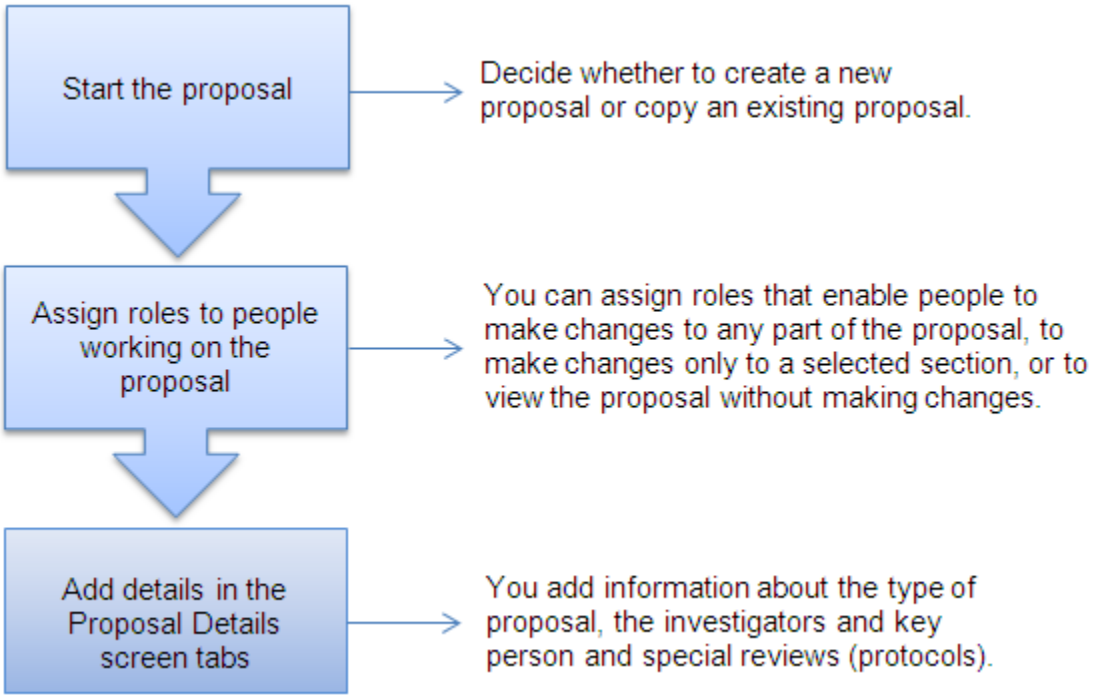
The proposal development process consists of the steps shown here. These steps are explained in detail in this guide.



Creating the Proposal

Overview of the Proposal Creation Process

In this section you create the framework for the proposal and fill in some details.



Proposal Details Screen

The PROPOSAL DETAILS screen consists of eight tabs, which contain information about the proposal. The tabs are described in the section *Adding Proposal Details*, page *17*.

Icons specific to proposal creation are on the second toolbar (see *Coeus Interface*, page 9). That toolbar is shown here. Icons are shown when they are used in the instructions that follow.

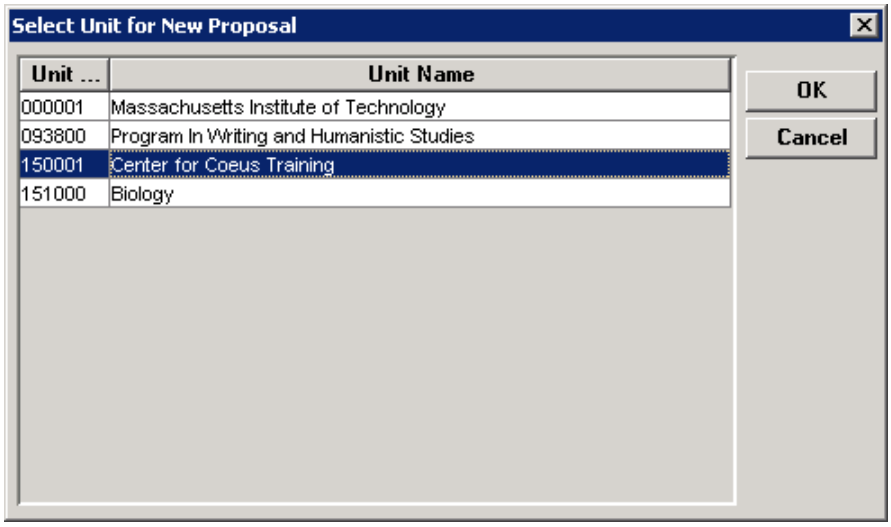
Starting the Proposal

You can start a proposal by creating a new one or copying an existing proposal. The method you choose depends on your needs. The sections that follow provide instructions for these methods.

Note: In this chapter you will use the menu item **Maintain > Proposal Development…**. Please be aware that this is a very different selection than **Maintain > Institute Proposals**. The Proposal Development module is for creating and modifying proposals; Institute Proposal module maintains the list of Institute-approved proposals (that is, proposals that have already been approved and submitted to a funding agency).

Creating a New Proposal

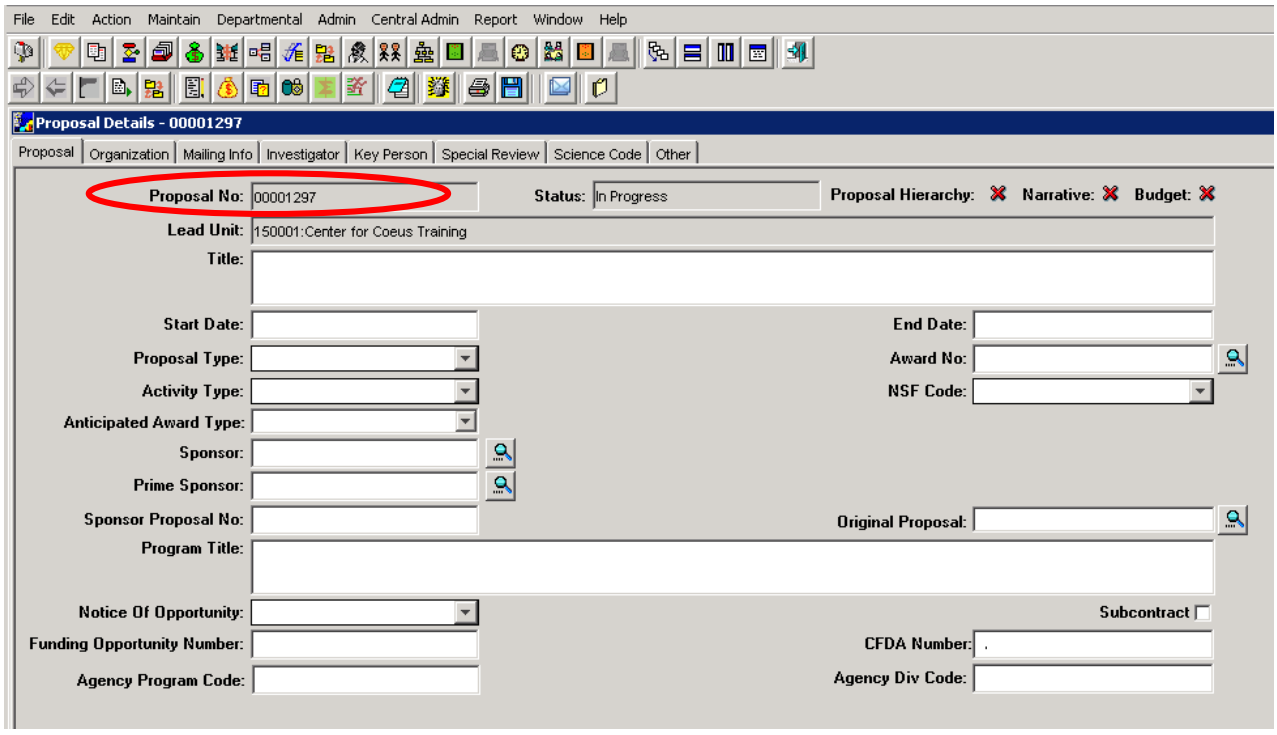
1. Click the **Maintain Proposal Development** icon or select **Maintain > Proposal Development…**. The DEVELOPMENT PROPOSAL LIST screen opens, with the SELECT DEVELOPMENT PROPOSAL search window over it.
2. Click **Cancel** to close the SELECT DEVELOPMENT PROPOSAL search window.
3. Click the **Add a New Proposal** icon or select **Edit > New Proposal.**
4. If you can create proposals for only one unit, skip to the next step. If you are authorized to create proposals for more than one department, the SELECT UNIT FOR NEW PROPOSAL window opens with a list of your units.



Select the unit that will create this proposal and manage the project. Click **OK**.

Note: Since the unit number cannot be changed during the proposal process, it is important that you select the correct one. If you selected the incorrect unit, close the newly generated proposal immediately and return to step 3.

5. A new PROPOSAL DETAILS screen opens.



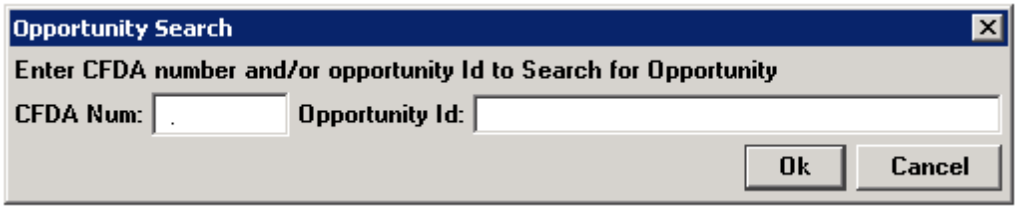
6. Coeus assigns a number to this proposal in the **Proposal No.** field (circled). Make a note of this number so you can easily return to this proposal.
7. Add the proposal details (see *Adding Proposal Details*, page *17*).
8. Click the **Save** icon or select **File > Save**.

Creating a new proposal from a Grants.gov Opportunity Search

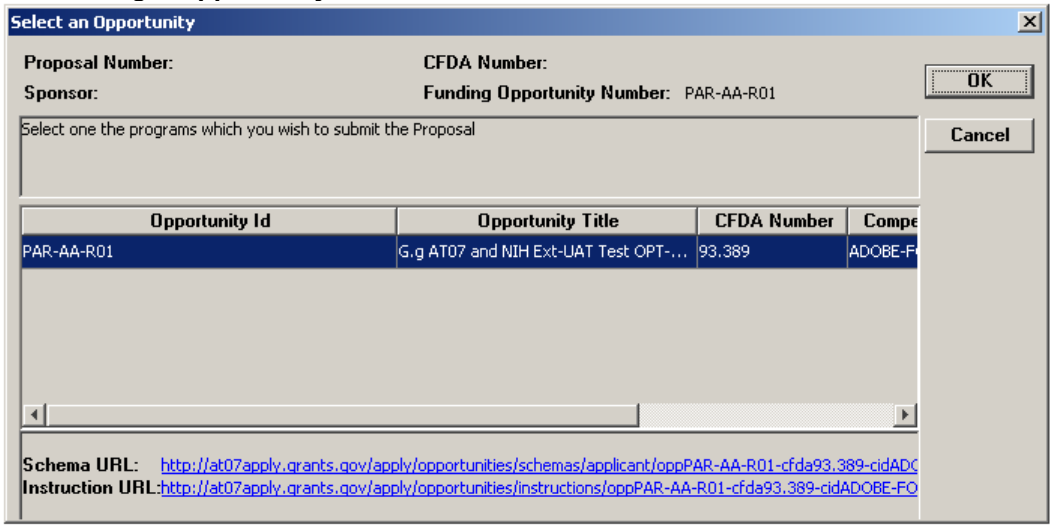
You can locate a posted opportunity with the Coeus Grants.gov search without an existing Coeus proposal record started, and then generate a new proposal record that includes this Opportunity schema details. The Opportunity ID and CFDA number will automatically be populated on the Proposal Details window.

1. Launch Proposal Development
2. Click **Edit > Create Proposal for Grants.gov Opportunity**
3. Input search criteria in Opportunity Search window.
   - Enter *only* the opportunity and the search result will attempt to target just that single opportunity.
   - Enter *only* the CFDA and the search result will return the list of opportunities maintained by the sponsor.
   - Enter *both* CFDA and Opportunity number:
     - If there is no correct match, the CFDA search is provided as a default.
     - If the CFDA and Opportunity *do* match, the single opportunity is provided as the result.
4. In the resulting SELECT AN OPPORTUNITY window, click on an opportunity to select it, and then click **OK** to generate a proposal development record.
5. If you have the Proposal Create role in multiple units, the SELECT UNIT FOR NEW PROPOSAL window will appear; Select a unit, click **OK**.
6. A new proposal screen is presented with the Funding Opportunity and CFDA number (if both maintained in the Grants.gov Schema).
   - User *must* still maintain the required fields – including Federal Sponsor - and save the proposal and to complete the link to Grants.gov.

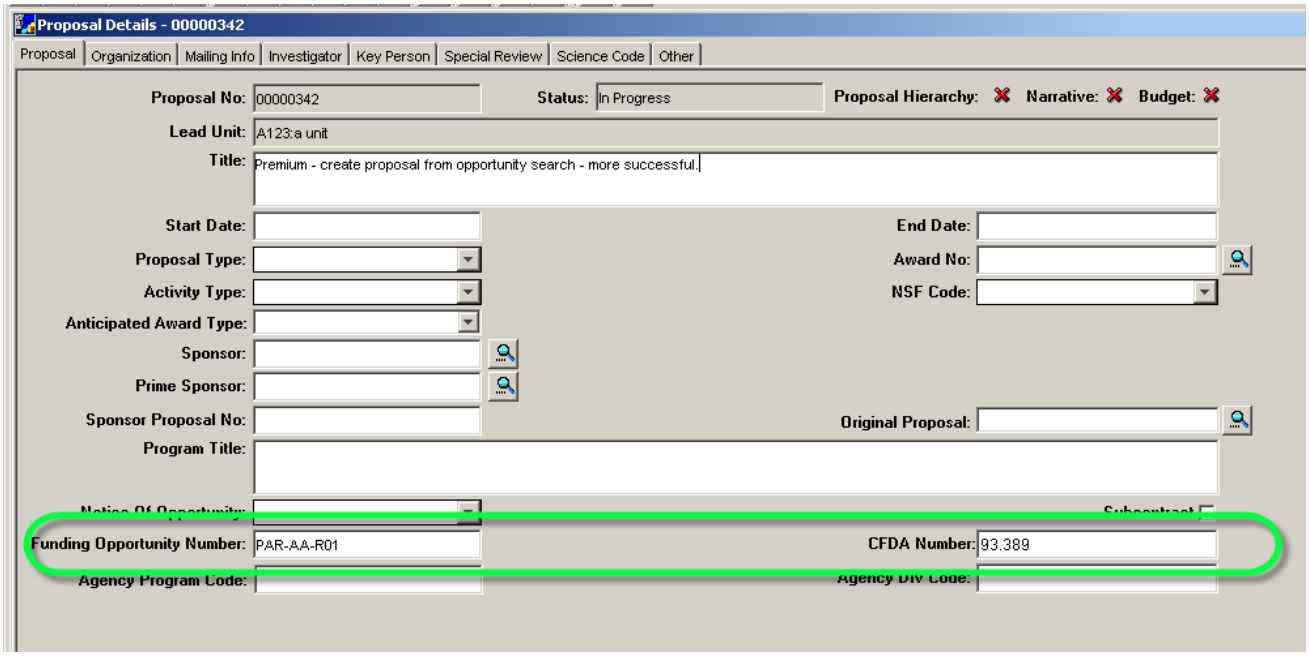
Proposal Development> Edit>Create Proposal for Grants.gov Opportunity



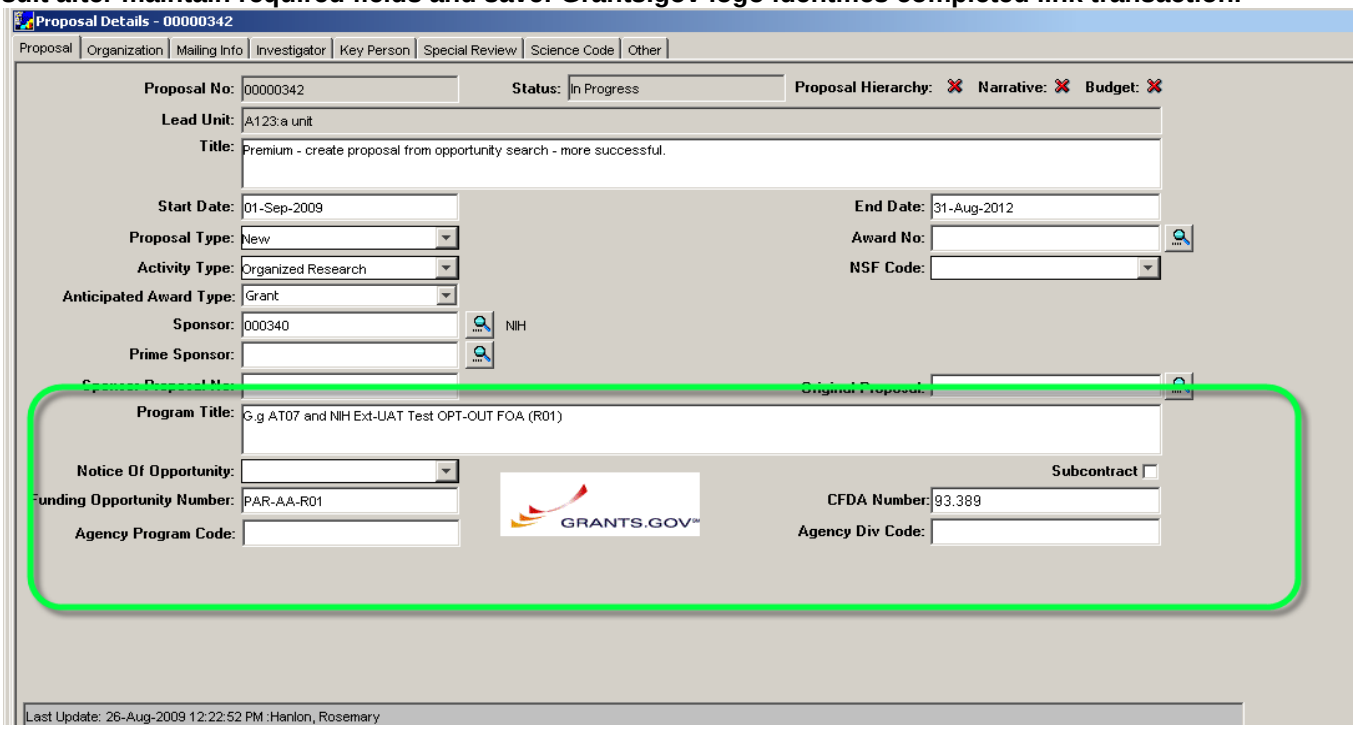
Search result when a single Opportunity ID was used as criteria:



Result of selecting opportunity from search and selection of Unit: new proposal with Funding Opportunity & CFDA maintained.



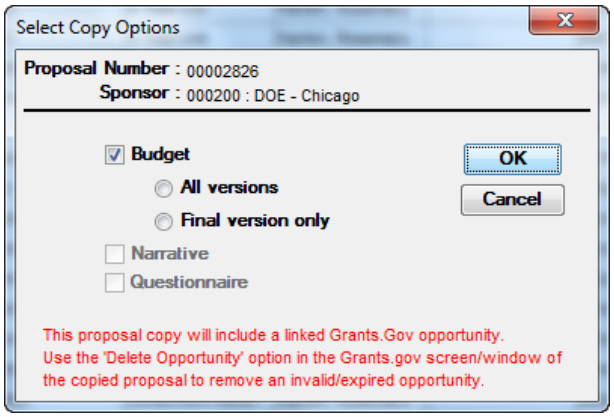
Result after maintain required fields and save: Grants.gov logo identifies completed link transaction.



A Federal Sponsor must be input in the **Sponsor** field to complete the Grants.gov Opportunity link. Only Federal sponsors are eligible for Grants.gov submission. Also: some grants.gov opportunities are only listed by the sponsor by the Funding Opportunity Number – this is very common with NIH. 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 navigate to Grants.gov screen to complete the opportunity link to the proposal. Users should always navigate to the Grants.gov window during proposal preparation to review and select forms, therefore this is not a blocking issue for this functionality.

Copying an Existing Proposal

1. Click the **Maintain Proposal Development** icon or select **Maintain > Proposal Development…**. The DEVELOPMENT PROPOSAL LIST screen opens, with the SELECT DEVELOPMENT PROPOSAL search window over it.
2. Enter search criteria, such as proposal number, PI, or unit; in the appropriate column of the SELECT DEVELOPMENT PROPOSAL window (see *Appendix: Searching in Coeus Premium*, page 131).
3. Click **Find**. A list of proposals matching your search criteria displays in the DEVELOPMENT PROPOSAL LIST screen.
4. Select the proposal to copy by single-clicking anywhere in its row.
5. Click the **Copy Proposal** icon or select **Edit > Copy Proposal…**. The SELECT COPY OPTIONS window opens.



6. Make these selections:
   a. Select the **Budget** checkbox to copy the original proposal's budget (if appropriate). Since it is possible that the original proposal does not have a version designated **Final**, it is recommended that you select **All versions**.
   b. Select the **Narrative** checkbox if you want to copy the narratives from the original proposal.
   c. Select **Questionnaire** checkbox if you want to copy the answered questionnaire from the original proposal (if this is gray, it means there is no answered questionnaire to copy).
   d. Grants.gov opportunity link is copied if the original proposal contained one. The user may need to update the opportunity
7. Click **OK**.
8. If you can create proposals for only one unit, go to step 9. If you are authorized to create proposals for more than one department, the SELECT UNIT FOR NEW PROPOSAL window opens with a list of your units (see page *12*). Select the unit that will process this proposal and click **OK**.
9. A line for the copied proposal displays in the DEVELOPMENT PROPOSAL LIST. Except for the proposal number, which is unique, details of the copied proposal are the same as the original proposal.
10. Single-click to select the line in the Development Proposal List for the new proposal. Click the **Modify Selected Proposal** icon or select **Edit > Modify Proposal…**.

Note: Do not double-click the highlighted proposal line or select **Edit > Display Proposal…**. This will open the proposal in view-only mode – the fields will have grey backgrounds, meaning data cannot be modified. To open in modify mode, close the proposal, select the proposal with a single click and either click the **Modify Selected Proposal** icon or select **Edit > Modify Proposal.**

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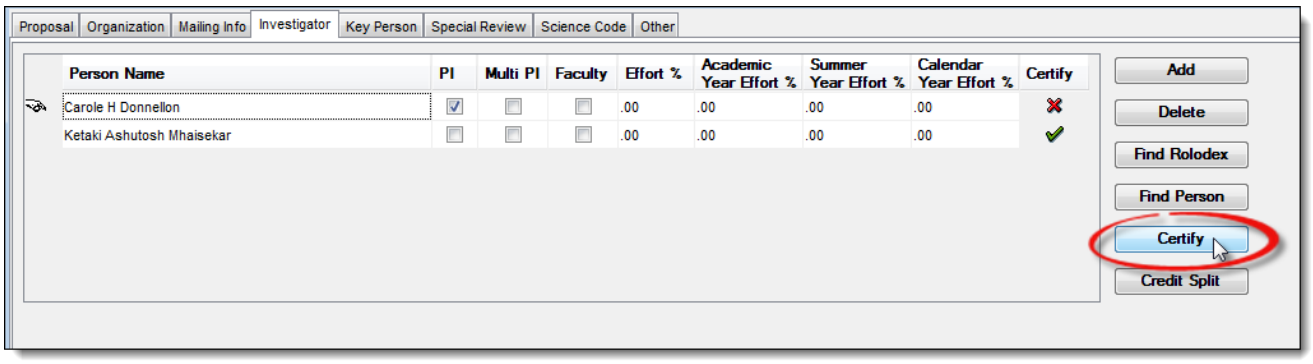
11. Make any necessary changes to the proposal:
    a. Adjust the start and end dates.
    b. Link to the Grants.gov opportunity and forms (see *Linking the Proposal to a Grants.gov Opportunity*, page *43*)
    c. Verify that any copied narrative types are still appropriate (see *A Note About Copied Grants.gov Proposals & Narratives*. page *96*)
    d. Adjust the budget period boundaries to reflect the new dates (see *Adjusting the Period Boundaries*, page 51).
    e. Review the rate tables, syncing the rates if necessary (see *Verifying the Proposal Rates*, page *53*).

12. 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.

Hint: It is a good idea to have two instances of Coeus open so you can see how the PI answered the questions originally.

13. Click the **Save** icon or select **File > Save**.

Assigning Proposal Roles

You can grant users view or update access to your proposal, but you cannot grant anyone approver access from this screen. In addition you can add others to help you prepare the proposal.

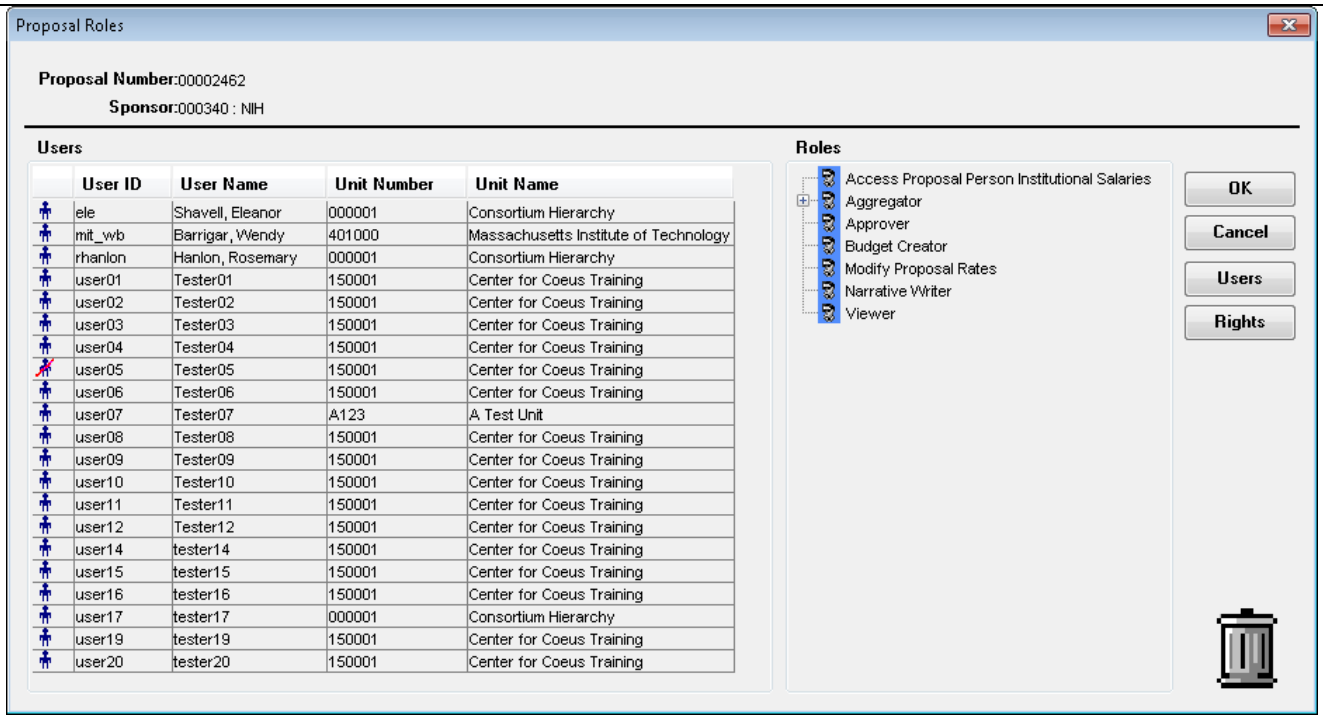
Any roles you assign to a user apply only to the current proposal. If you copy a proposal, access rights do not carry over. Access rights apply only to the specific proposal number in which they are granted.

Proposal roles are defined in the following table.

Role	**Definition**
Aggregator	Make changes to any part of the proposal, answer yes/no questions, certify investigators, 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 set up in advance and maintained by SRS. NOTE: College level approvers (AO's) can add approvers.
Budget creator	Make changes to the budget only.
Narrative writer	Make changes to the narratives only.
Viewer	View any part of the proposal. A viewer cannot make any changes.

Adding a User to a Role

1. From the PROPOSAL DETAILS screen click the **Proposal Roles Maintenance** icon or select **Edit > Proposal Roles**. The PROPOSAL ROLES window opens.



The **Users** pane, on the left, displays all authorized Coeus users in your unit. The **Roles** pane, on the right, lists the roles you can assign to users. The roles are expandable: Click a plus button ⊞ to see all users who have been assigned to that role, or click a minus button ⊟ to collapse that role.

2. Select a user in the **Users** pane by clicking to highlight the row. Drag and drop the name onto the role in the **Roles** pane. The user's name displays under the assigned role. You can add any number of users to a role.
3. To add someone from outside your unit, do the following:
   a. Click **Users**. The USER SEARCH window opens.
   b. Enter your search criteria and click **Find**. The results of the search display in the USER SEARCH RESULT tab.
   c. Highlight the name you want to add and click **OK**. The name is added to the Users pane.
   d. Select the user, and drag and drop the name as in step 2 above. The user's name displays under the assigned role.
4. Click **OK** to save changes or click **Cancel** to exit without saving.

Note: UC does not maintain salaries in Coeus; therefor we do not use the "Access Proposal Person Institutional Salaries" role.

Removing a User from a Role

1. Click the **Proposal Roles Maintenance** icon or select **Edit > Proposal Roles.** The PROPOSAL ROLES window opens.
2. If necessary, click the plus button ⊞ to expand the list of users under the role from which you want to remove a user.
3. Click to highlight the user's name under the role.
4. Drag the user's name to the trash can icon in the lower right of the screen (see page *17*). The name no longer displays under the role.
5. Click **OK** to save changes or click **Cancel** to exit without saving.

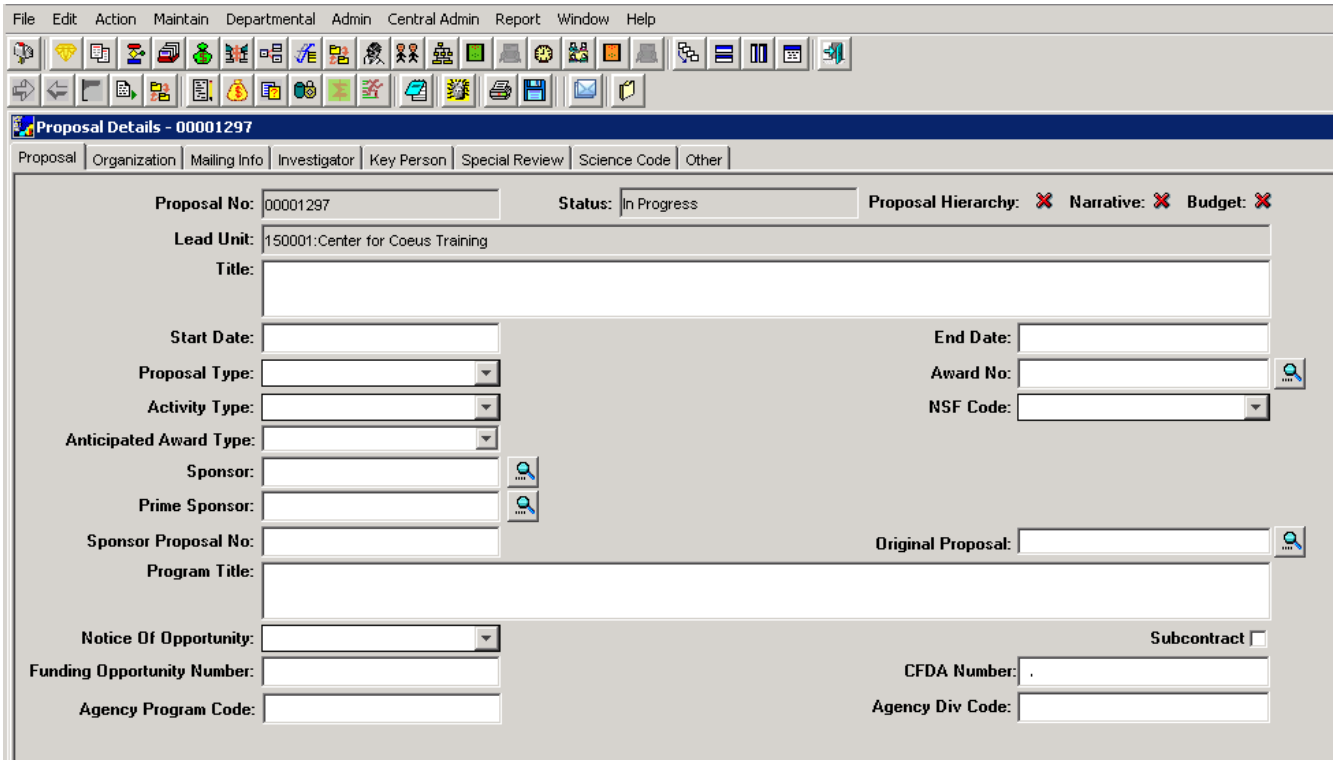
Adding Proposal Details

Note: Before you start filling in details, be sure to read the sponsor announcement for specific requirements.

Add details by populating fields in the PROPOSAL DETAILS screen. This screen consists of several tabs, which are described here.

Proposal Tab

The PROPOSAL tab contains basic information about the proposal.



Proposal No. — Coeus assigns a number when the proposal is created.

Status— Set by user actions. The possible statuses are:

Status	Description
In Progress	Proposal is being worked on; it has not been submitted for approval.
Approval in Progress	Submitted for approval.
Rejected	Rejected by an approver.
Approved	Accepted by all UC approvers.
Submitted	Submitted to sponsor.
Post Submission Approval	One or more approvers need to approve after submission.
Post Submission Rejection	One or more approvers rejected after submission.

Proposal Hierarchy — An icon that shows the proposal's status in a hierarchy. See Linking Proposals in a Hierarchy, page 97, for more information. Please contact SRS before creating a hierarchy – coeus@uc.edu

Narrative — An icon that shows the status of the narratives. See Checking the Status of the Narrative and Budget, page *107*, for more information.

Budget — An icon that shows the status of the budget. See Checking the Status of the Narrative and Budget, page 107, for more information.

Lead Unit — This is a read-only field entered by Coeus using the proposal creator's home unit or the unit selected in the SELECT UNIT FOR NEW PROPOSAL window (see *Creating a New Proposal,* page *12*). Verify that it is the correct unit for the PI and this proposal. If this is not the PI's unit, then follow the Copy instructions in the note in step 4 on page *12*.

Title — *Required*. If you have copied another proposal, you might need to replace the title. For electronic submission, the title can contain no special characters (see *What "No Special Characters" Means*, page 142). See the sponsor's announcement or guidelines for requirements.

Start Date — *Required*. Enter the date the project is expected to start in **mm/dd/yy** format. (The format will change to dd-mm-yyyy when you leave the field.) Refer to the sponsor's announcement or guidelines for acceptable dates.

End Date — *Required*. Enter the date the project is expected to end in **mm/dd/yy** format. (The format will change to dd-mm-yyyy when you leave the field.) Refer to the sponsor's announcement or guidelines for acceptable dates.

Proposal Type — *Required*. Select the appropriate entry from the drop-down list or enter the first characters until the type appears. This information might be specified in the sponsor's announcement or guidelines. The **Proposal Types** are:

Proposal Type	Description
Continuation	Non-Competing continuation of an existing award (NIH Type 5)
New	New application
Renewal	Competing continuation of an existing award
Resubmission	Amended or updated application
Revision	Supplement or revised proposal for an existing award
Task Order	Project funded under a master agreement

Award No. — *May be left blank* – If the **Proposal Type** is Continuation, Renewal, or Revision enter the prior award number. Leave this field blank for New, Resubmission, or Task Order. Award Number is a Coeus-generated number; to find it click the **Search** icon next to the field and search by an Account number or other detail, or contact SRS.

Activity Type— *Required*. Select the appropriate entry from the drop-down list or enter the first characters until the name appears.

Refer to the announcement and UC policy to determine the **Activity Type**. The entry in this field determines overhead rates, so selecting the correct value is important.

Activity Type
Research
Instruction
Other or Public Service
Student Services
Clinical Trial

Anticipated Award Type — *May be left blank* - Select the type from the drop-down list, if known.

NSF Code — *Not currently used at UC.*

Sponsor — *Required.* The sponsor is the organization providing funds. If your proposal will be a subcontract to another organization's submission, enter the submitting organization as the Sponsor.

Click the **Search** icon to find the sponsor. Please contact coeus.uc.edu if your sponsor is not in Coeus.

Prime Sponsor — *May be left blank* - If your proposal will be a subcontract to another organization's submission, then enter the agency providing funds to that organization. **If your proposal is not a subcontract, then leave this field blank.**

Click the **Search** icon to find the sponsor. Please contact coeus.uc.edu if your prime sponsor is not in Coeus.

Sponsor Proposal No — *May be left blank* – Enter, if known, when the **Proposal Type** is Renewal, Resubmission, Revision, or Continuation.

Original Proposal — Used for a "Change/corrected" application to NIH. Enter the original Institute Proposal number of the first S2S submission to NIH for this proposal.

Program Title — *May be left blank* – 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 (see *Linking the Proposal to a Grants.gov Opportunity*, page *43*).

Notice of Opportunity — *Required.* Select an entry from the drop-down list to identify how this funding opportunity was announced.

Notice of Opportunity	Description
Federal Solicitation	Has a federal sponsor or prime sponsor
Unsolicited	Open announcement or no announcement
Verbal Request for Proposal	Communication from sponsor
SBIR Solicitation	Small Business Innovation Research
STTR Solicitation	Small Business Technology Transfer
Non-Federal Solicitation	Foundation, industrial, or any non-federal
UC Internal	Institutional program, not external sponsor

Funding Opportunity Number — *May be left blank* – For Grants.gov submissions: this will be populated automatically if CFDA is used to search and link. Otherwise, insert the number to perform the Grants.gov search. Either this field or **CFDA No.** is **required if submitting via Grants.gov**. If using CFDA search, do not over-write data; use only the numbers returned by Grants.gov. See Using Grants.gov, page 43. For other submissions, enter data manually, if known.

CFDA No. — *May be left blank* – Catalog of Federal Domestic Assistance number assigned by sponsor for funding opportunity. For Grants.gov submissions, enter the CFDA number to support the Grants.gov search. For other submissions: enter the data manually, if known

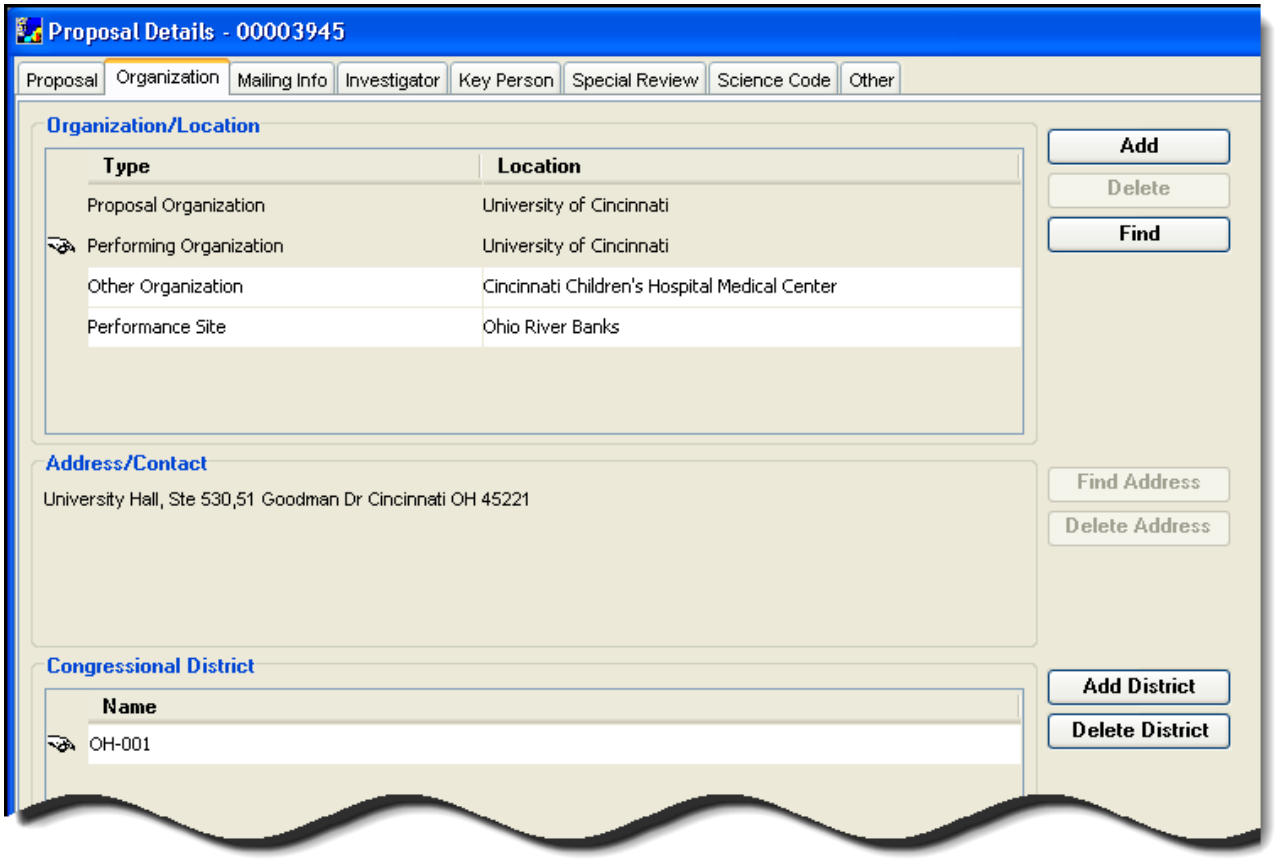
Note: Some NIH opportunities do not assign CFDA numbers until after award. Use the Funding Opportunity search for those applications and leave the CFDA field blank unless it is populated automatically by the selected Grants.gov opportunity. See Using Grants.gov, page 43.

Agency Program Code — *May be left blank* – 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. See https://www.fastlane.nsf.gov/pgmannounce.jsp.

Agency Div Code — *May be left blank* – 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. See https://www.fastlane.nsf.gov/pgmannounce.jsp.

Organization Tab

The ORGANIZATION tab contains the contacts for UC and performing sites involved in the project. The **Organization** and **Performing Organization** fields default to UC data.



Organization/Location:

Proposal Organization is the legal entity for the proposal – The University of Cincinnati.

Performing Organization is the organization performing the main portion of the project. There is only one, and for UC, this will be the same as the Proposal Organization (UC).

Other Organization is used for participants in the project, often recipients of a subaward. This selection uses the Organization table, which supports populating the DUNS number on certain sponsor forms.

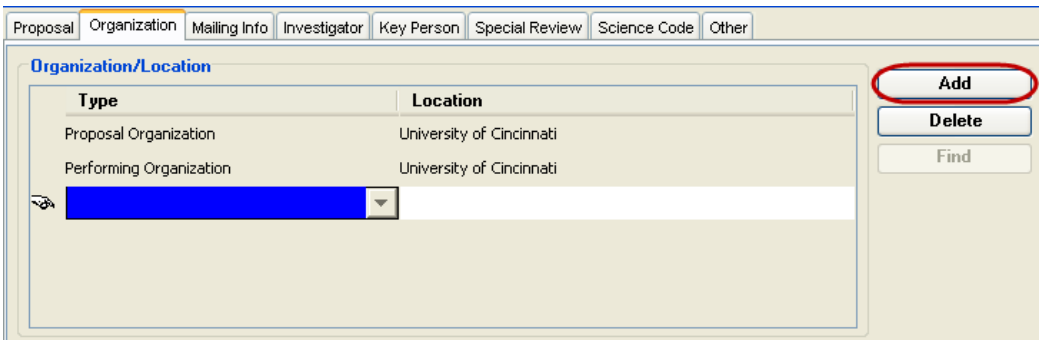
Performance Site/ Location a site where work is being done that is not an organization (e.g. a volcano, a field camp location, or other significant off campus location that should be recognized in the proposal). This selection uses the Rolodex table which does not support DUNS numbers.

Address/Contact: The UC proposal signing authority

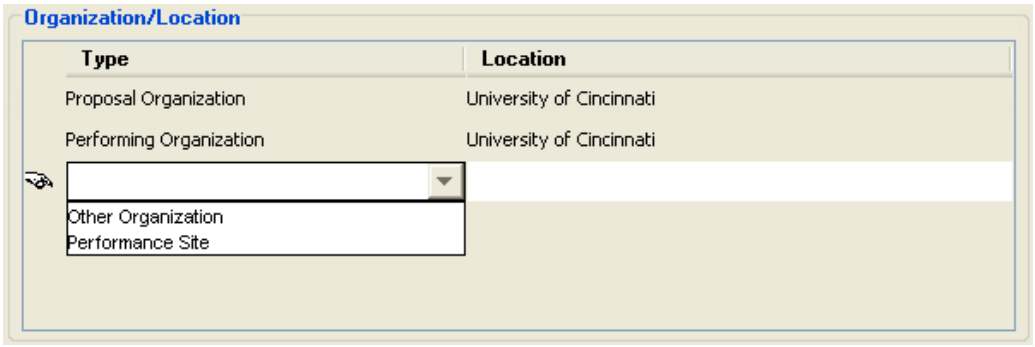
Congressional District: The 2 character State, hyphen, 3 character District format. (OH-001).

Add any additional Other Organizations or Performance Sites (aka Locations) on this tab, which could include subawards or off-campus locations.

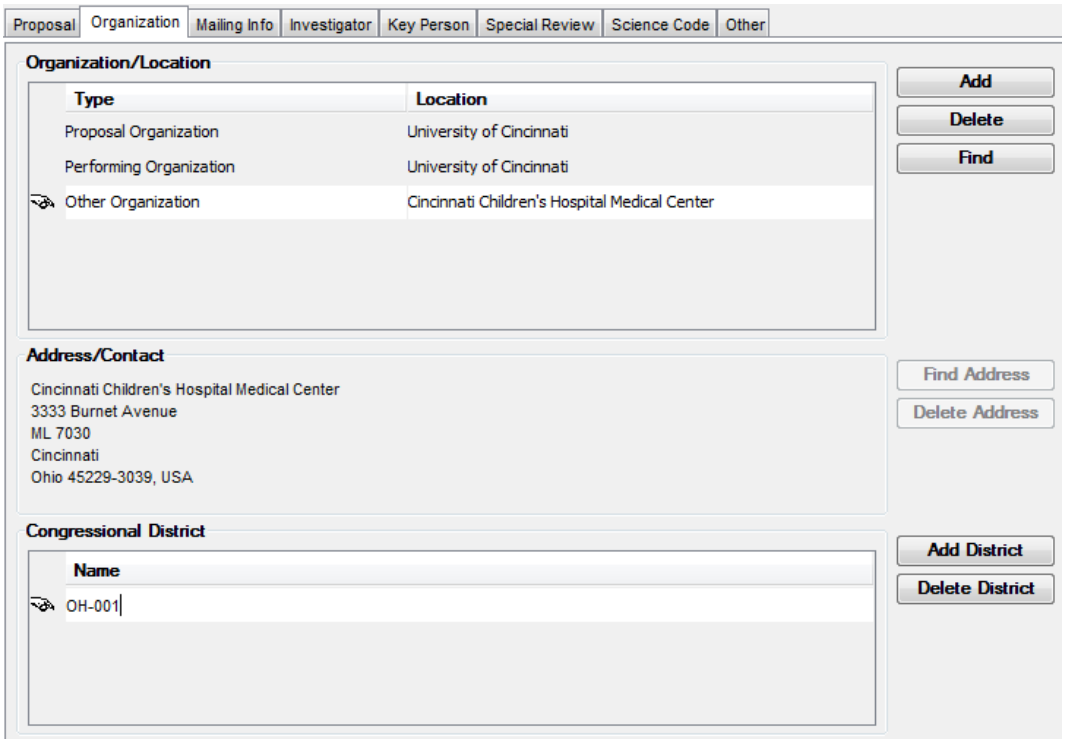
Adding an Other Organization



1. Click the **Add button located** in the upper right of the screen. A new **Organization/Location** field will be created beneath the default Organization data.
2. Select the **Type** from the drop-down list: select **Other Organization**.

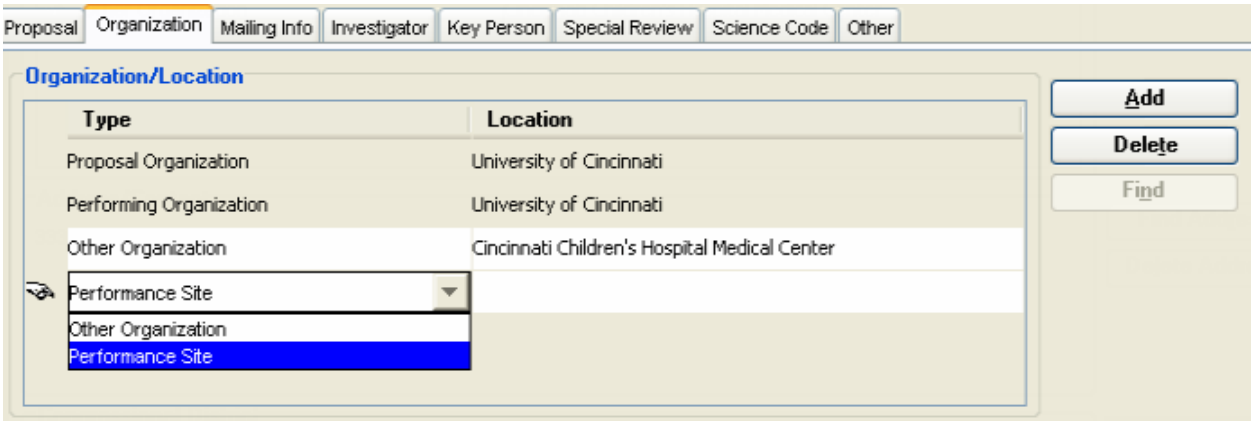


3. Select **Find** to search maintained Organizations. Please contact coeus.uc.edu if your organization is not in Coeus.
4. Select a result from the search result window and click **OK**. The Location, Address/Contact, and Congressional District fields will be populated from the Organization record.

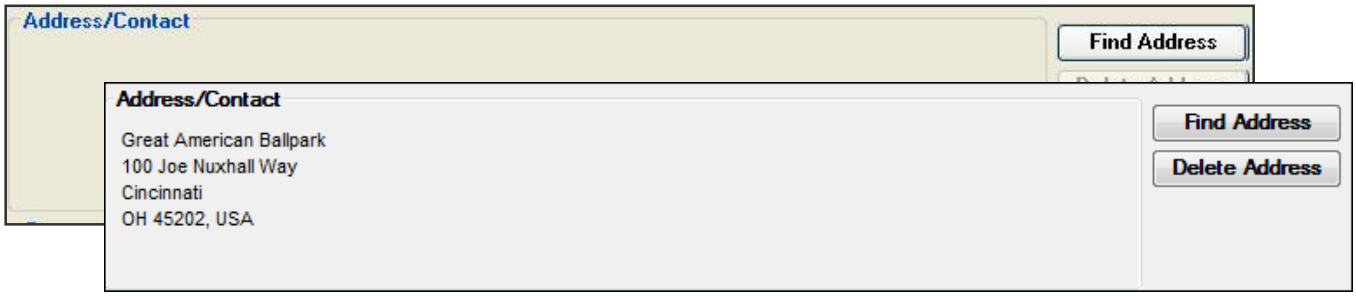


Adding a Performance Site

1. Click the **Add** button (located in the upper right of the screen). A new **Organization/Location** field will be created beneath the default Organization data.



2. Select the **Type** from the drop-down list: select **Performance Site**.
3. Type a contact or organization name in the blank Location Field.



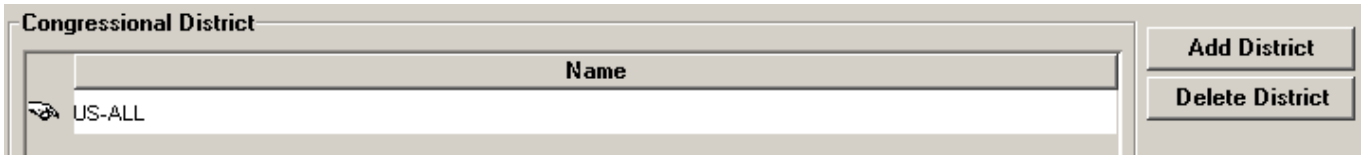
4. Click the **Find Address** to open the ROLODEX SEARCH window and search for the address (see *Searching the Rolodex*, page *136*).

Note: If you cannot find the performance site in the Rolodex, see Adding a Name to the Rolodex, page 120. After entry in the Rolodex, search again to add it to the Organization list.

Select the address from the search result window and click **OK**. The address will display in the **Address/Contact** pane. Use the **Delete Address** button to remove the address and find another.

Adding a Congressional District

Select the **Add District** button in the Congressional District pane to create an entry field. Enter the code in the prescribed format: 2-character State, hyphen, 3-character District format. (ex: OH-001) Use the **Delete District** button to remove the entry.

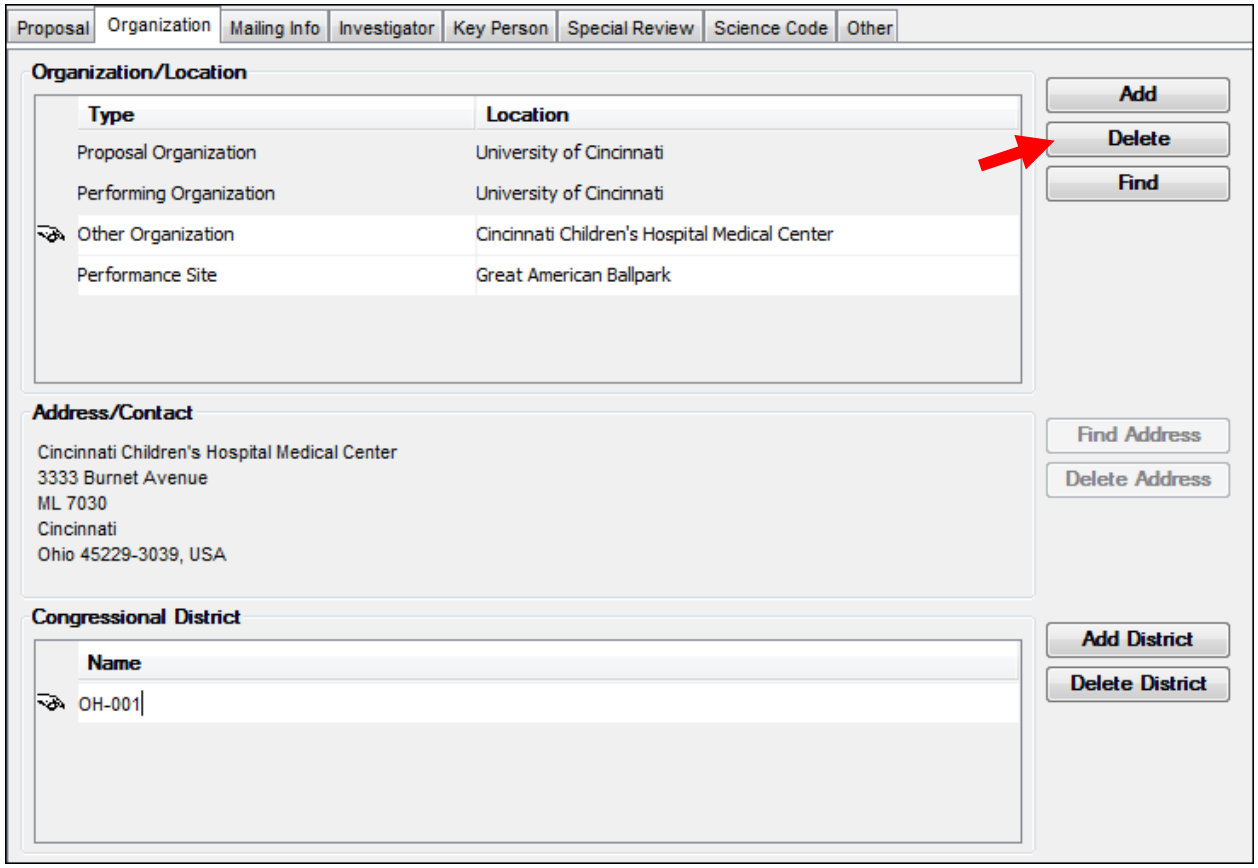


Note Regarding Congressional Districts:

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

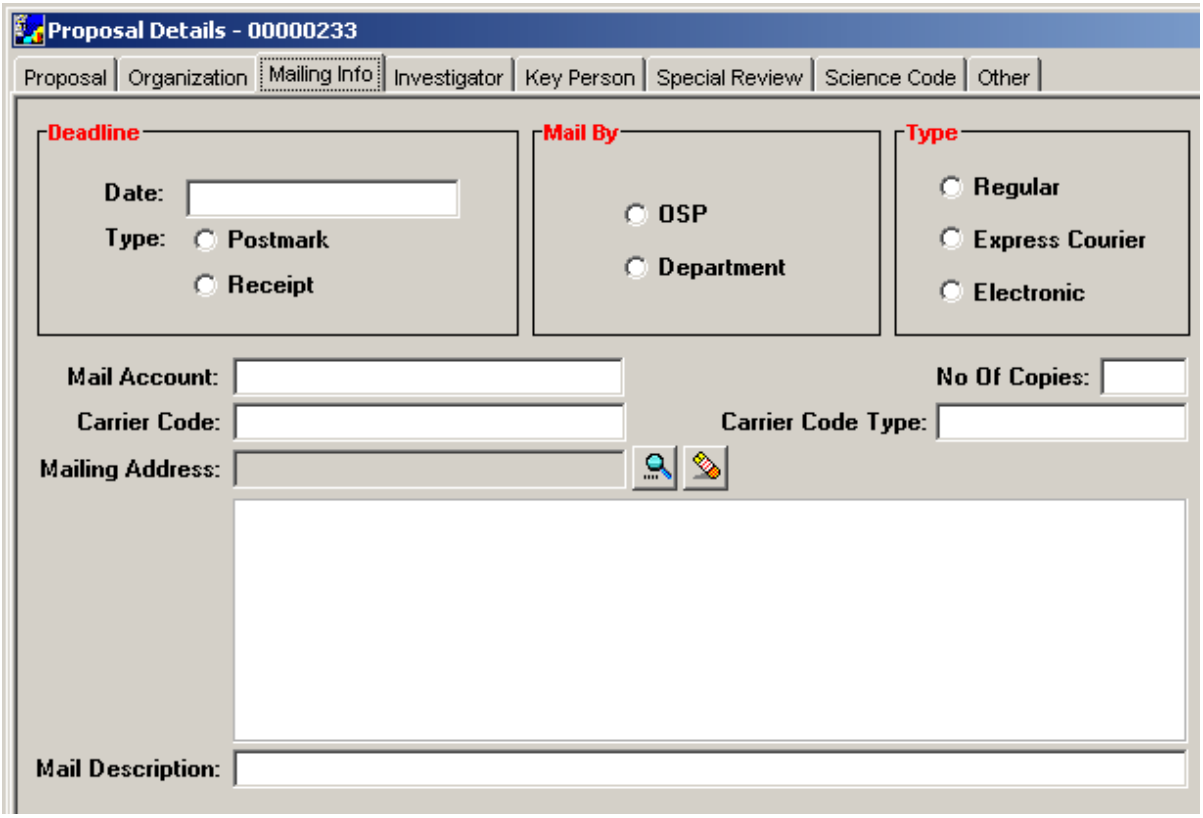
Removing an Other Organization or Performance Site

To remove an entered Organization or Performance Site, with the entry line selected, use the **Delete** button. This will also delete this entry's Address and Congressional District.



Mailing Info Tab

The MAILING INFO tab specifies the date by which the sponsor must receive the proposal and includes information about how the proposal will be transmitted to the sponsor.



Add the submission date and details by filling in these fields.

Date — Enter the due date. The format is **mm/dd/yyyy**. In addition to entering the date, select the appropriate option button, indicating if this is the date by which the proposal must be postmarked or received by the sponsor.

Mail By — Select either the **OSP** (Office of Sponsored Programs –known as SRS at UC) or **Department** option button to indicate which department will submit the proposal. This field can be left blank.

Type — Select the option button for the carrier that will deliver the proposal: **Regular** (U.S. mail), **Express Courier**, or **Electronic**. This field can be left blank..

No. of Copies — Enter the number of copies to submit. This field can be left blank.

Mail Description — This field can be used for comments. This field can be left blank.

Mail Account, Carrier Code, and Carrier Code Type — This field can be used to communicate internal billing accounts.

Adding a Mailing Address

Note: The physical mailing address in the MAILING INFO tab provides an address for communication with the sponsor, especially for paper submittals. *May be left blank*

Open the MAILING INFO tab of the PROPOSAL DETAILS screen.

Click the **Search** icon next to the **Mailing Address** field. The ROLODEX SEARCH window opens.

Enter search criteria. (See *Searching the Rolodex*, page 136, for more information.)

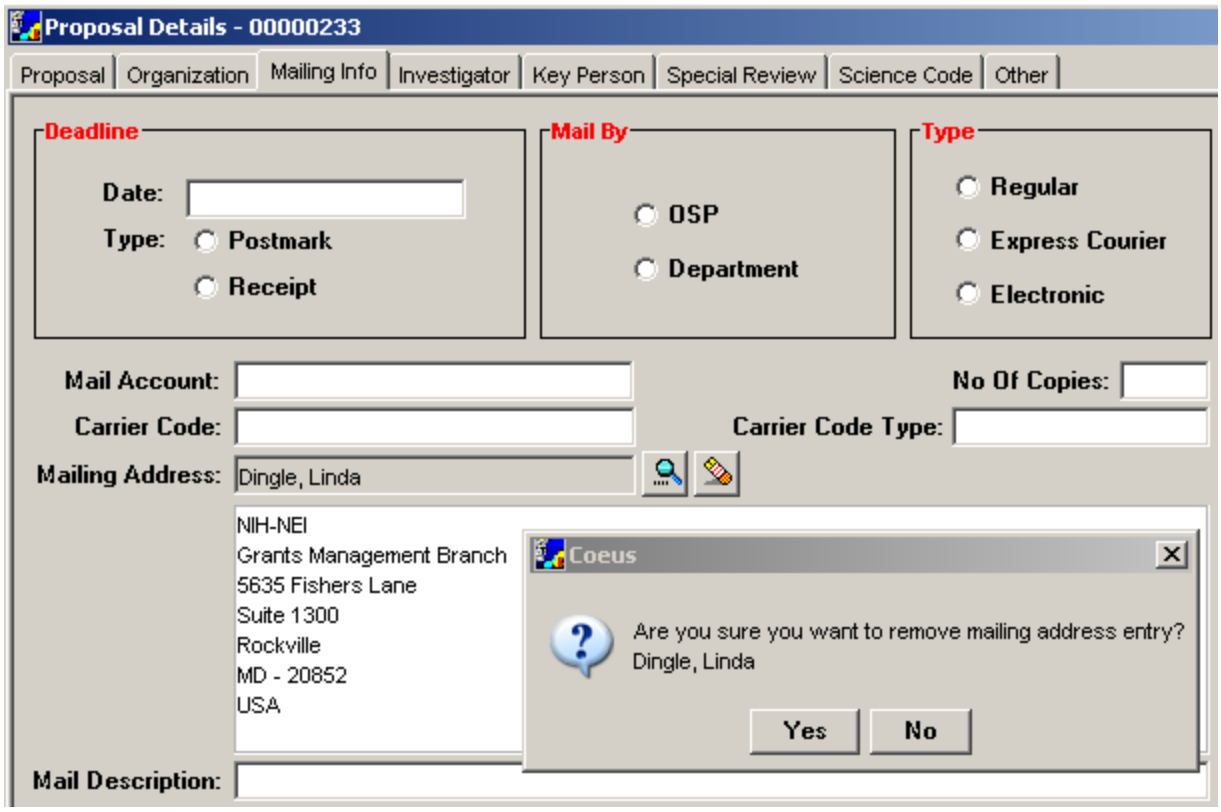
Click **Find** to display search results.

Highlight the desired line and click **OK**. The name and address information display in the MAILING INFO tab.

Removing a Mailing Address

Open the MAILING INFO tab of the PROPOSAL DETAILS screen.

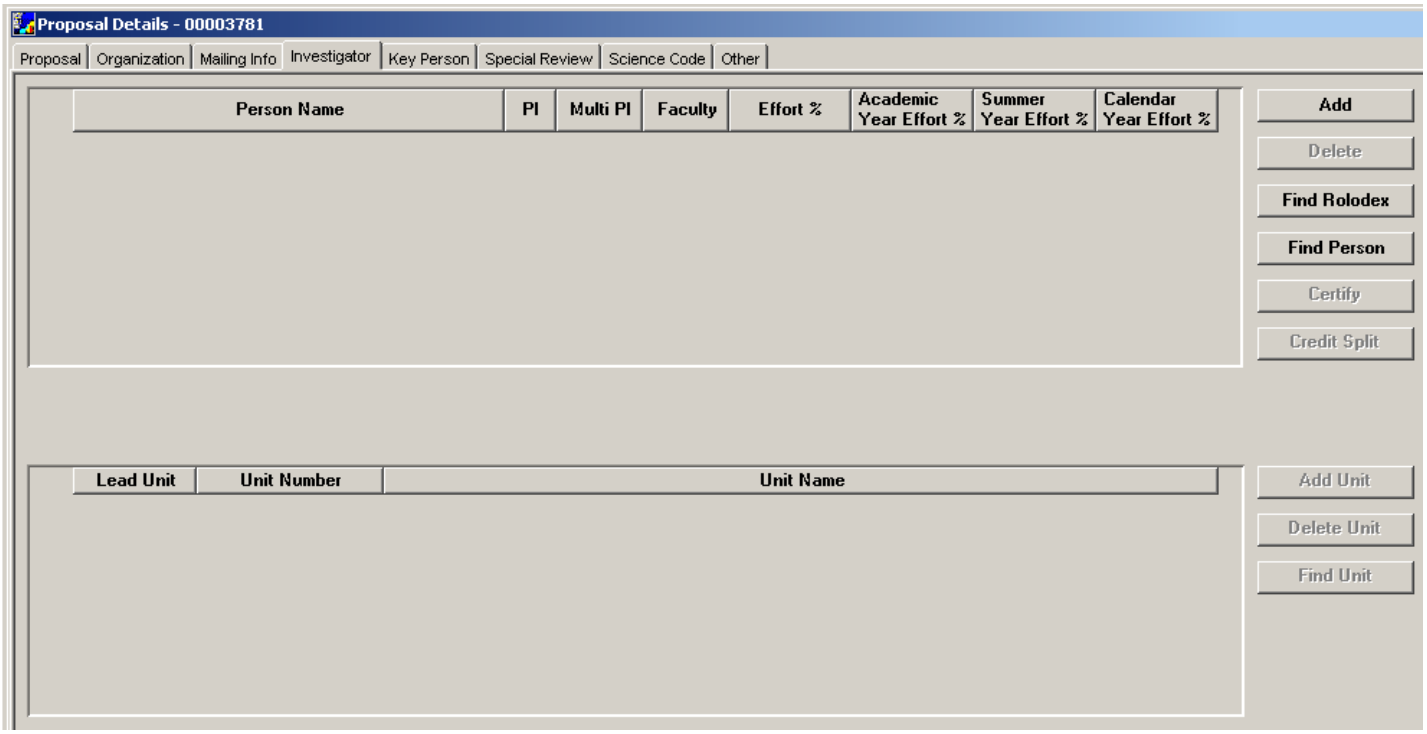
Click the Remove icon next to the Mailing Address field. A verification message opens.



Click **Yes** to remove the mailing address or **No** to stop the operation.

Investigator Tab

Identify the Principal Investigator (PI), Multiple Investigators, and Co-Investigators in the INVESTIGATOR tab. Enter estimated effort over the entire project period and designate the lead unit for the PI. Investigators from other institutions should be listed in the KEY PERSON tab.



Listing Investigators

1. Open the INVESTIGATOR tab of the PROPOSAL DETAILS screen.
2. Click **Find Person**. The PERSON SEARCH window opens.
3. Enter the person's name in the **Last Name** field.

Note: You can search for more than one person at a time. See Appendix: Searching in Coeus Premium, page 131, for more information.

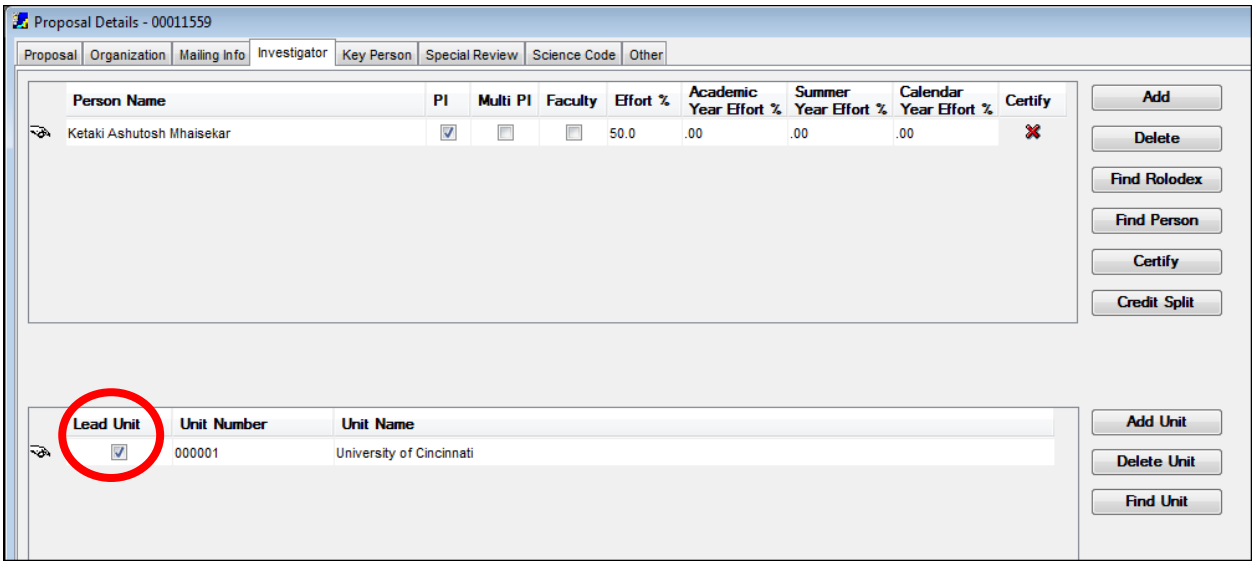
4. Click **Find**. The PERSON SEARCH RESULT tab section of the PERSON SEARCH window displays the search result.
5. Click to select the row that has the investigator's name. Click **OK** or press **Enter**. The PERSON SEARCH window closes, and focus returns to the INVESTIGATOR tab.
6. Enter the estimated project effort for the investigator.
7. The **PI** checkbox is checked by default for the first person searched and entered. Make sure this box is checked for the PI. (Only one PI box can be checked; see note.) All others listed on this tab without PI checked or Multi-PI checked will be maintained as Co-Investigators.
8. The **Faculty** checkbox is selected or not based on feeds from HR. You do not need to change this.
9. Select **Multi-PI**, if appropriate, for all Investigators that will be Multiple PI's. (See Note)
10. Repeat steps *2* through *9* to add other investigators to this list.

Note: Use the **Multi PI** checkbox to designate Investigators as Multiple PI (including the Principal Investigator). The Principal Investigator selected will be recognized as the Contact PI by NIH. At this time, NIH is the primary sponsor utilizing Multi PI; please review your NIH opportunity for more eligibility and submission requirements.

Indicating the Lead Unit

The lead unit is indicated only for the PI. This is the unit in which the proposal is created and the project will be managed. See the description of the **Lead Unit** field, page 18 and the SELECT UNIT FOR NEW PROPOSAL window, page *12*, for more information.

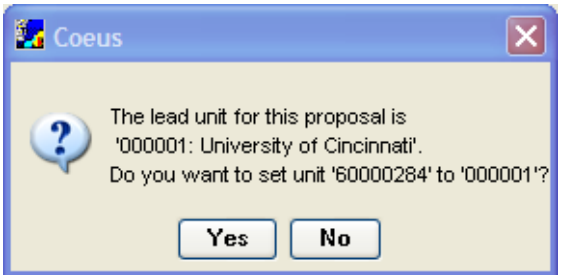
1. In the INVESTIGATOR tab of the PROPOSAL DETAILS screen, click to select the PI's name. The PI's unit number and name display at the bottom of the screen.



2. Select the **Lead Unit** checkbox (circled above). If the PI's unit is the same as the unit for the proposal, continue on to the next section. If the units are not the same, a prompt message similar to this displays.

3. Click **Yes** to change the PI's unit. If you click **No**, you will be unable to save the proposal unless you select another PI in your proposal unit.

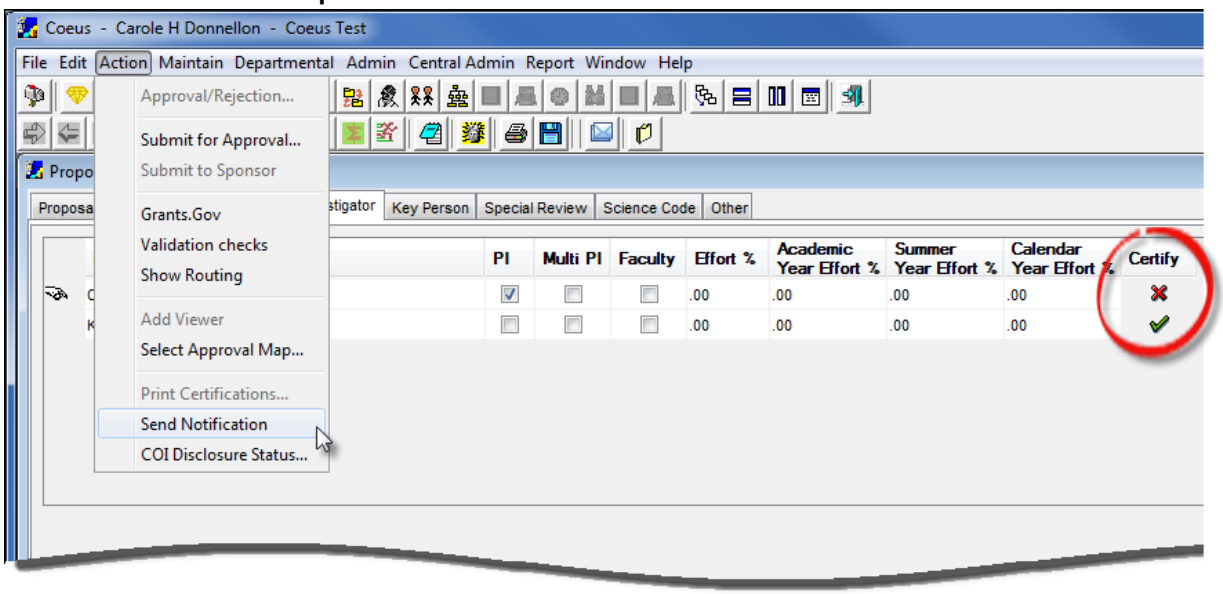
4. Save the proposal.



PI Certification

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

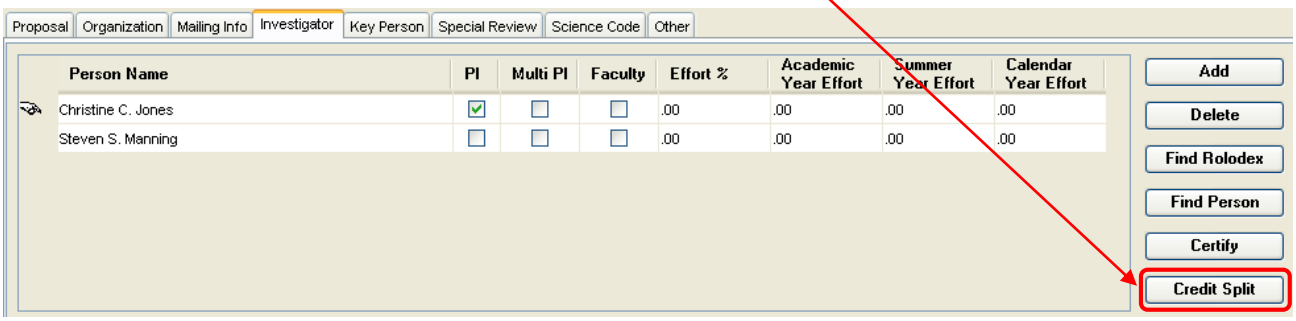
1. Note the red "X" in the Certify Column on the INVESTIGATOR tab for the PI. This will change to a green "√" once the PI certifies the proposal. Co-investigators will have a green "√" once the proposal is saved as they are not required to certify. The column changes to blank for Key Persons upon save.
2. In the INVESTIGATOR tab of the PROPOSAL DETAILS screen, select **action**, then **Send Notification**. The PI will receive an email with a link to their certification questions for the current proposal. **This link must be used to answer the certification questions.**



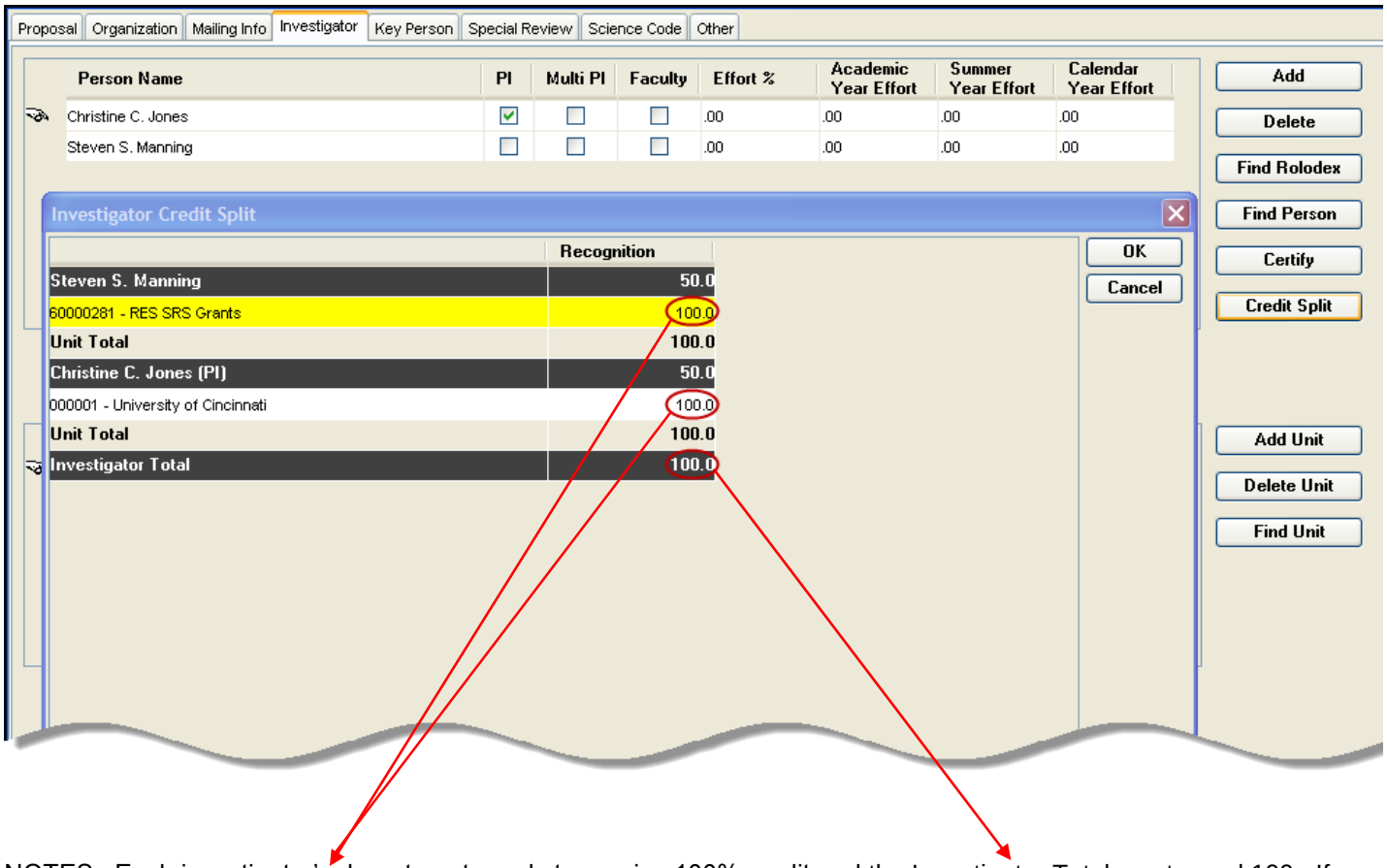
3. A pop-up will appear with a list of all the Investigators and Key Persons on the proposal. Select the PI only.
4. If the PI cannot find the email with the link, then repeat step 1. You do not need SRS to resend the email.
5. Only the PI needs to certify the proposal.

Credit Split

In the INVESTIGATOR tab of the PROPOSAL DETAILS screen, click the **Credit Split** button.



The INVESTIGATOR CREDIT SPLIT window will open.



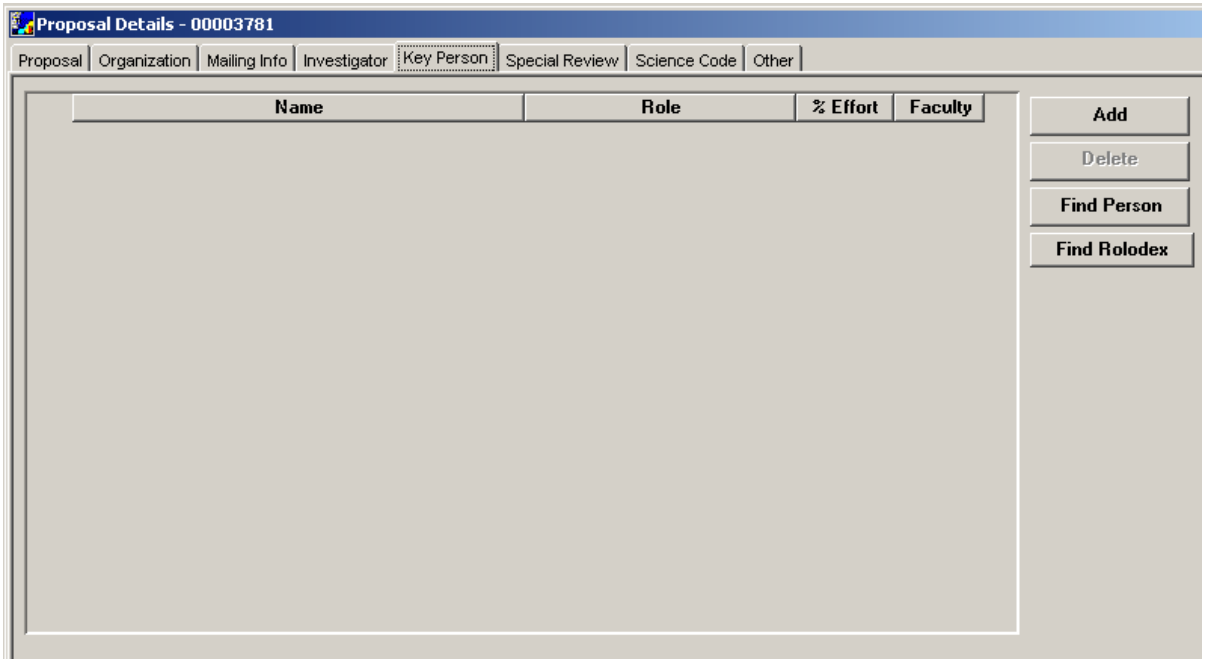
NOTES: Each investigator's department needs to receive 100% credit and the Investigator Total must equal 100. If a person has more than one unit, then please delete the unit you are not using for this proposal before assigning credit.

Check with your department BA for your college's business rules regarding credit split. Please note that an investigator needs to receive at least 1% credit to appear in the university's proposal and award reports.

You no longer need to give a person credit in order for a fiscal account to be opened. Please see the UC specific questionnaire regarding fiscal accounts. See Answering Questionnaires page 104.

Key Person Tab

The KEY PERSON tab lists key individuals on the project. These are named contributors who have significant roles, but are not investigators on the project. Investigators from other institutions should be listed in the KEY PERSON tab.



Listing Key Persons within UC

1. Open the KEY PERSONS tab of the PROPOSAL DETAILS screen.
2. Click **Find Person**. The PERSON SEARCH window opens.
3. Enter a search term in the **Full Name** field. (The most useful term is all or part of the person's last name between wildcards: ***lastname***.)

Note: See Appendix: Searching in Coeus Premium, page 131, for more tips and information.

4. Click **Find**. The PERSON SEARCH RESULT tab displays the search result.
5. Click to select the row that has the person's name. Click **OK**. The PERSON SEARCH window closes, and focus returns to the KEY PERSON tab.
6. Enter the project role this person will assume in the **Role** field.
7. Enter the estimated full project effort.
8. The **Faculty** checkbox is selected or not based on feeds from HR. You do not need to change this.
9. Repeat steps *2* through *7* to add others to this list.

Listing Key Persons from Outside of UC

1. Open the KEY PERSONS tab of the PROPOSAL DETAILS screen.
2. Click **Find Rolodex**. The ROLODEX SEARCH window opens.
3. Enter search criteria (see *Searching the Rolodex*, page 136).
4. Click **Find**. The ROLODEX SEARCH RESULT tab displays the search result.
5. Click to select the row that has the person's name. Click OK. The ROLODEX SEARCH window closes, and focus returns to the KEY PERSON tab.
6. Enter the project role this person will assume in the **Role** field.
7. Enter the estimated full project effort.

Note: If you cannot find the contact in the Rolodex, see Adding a Name to the Rolodex, page 120. After entry in the Rolodex, search again to add it to the Key Persons list.

Adding a Key Person Unit

You can now add units to support approval routing.

1. In the KEY PERSON tab, select the person.
2. If you know the unit number, enter it as follows:
    a. Click **Add Unit**. An empty field opens.
    b. Enter the unit number in the **Number** field. Press the **Enter** key. The **Name** field is filled in.
3. If you *do not* know the unit number, search for it as follows:
    a. Click **Find Unit**. A search window opens.
    b. Enter search criteria (see *Appendix: Searching in Coeus Premium*, page *131*), using a wildcard if applicable. Click **Find**. The results list displays.
4. Select the appropriate entry from the results list. Click **OK**. A new line with the unit number and name is added.
5. Repeat the steps to list another unit for the selected key person.
6. The number and name display at the bottom of the screen as they do in the INVESTIGATOR tab.

Note: If you would like to assign credit to a UC person on the Key Person tab, then please indicate this on the UC Policy Questions in the Questionnaire section; see Answering Questionnaires, page 104. Be sure to double check the approval map to be sure the new map is there.

Delete a Key Person Unit

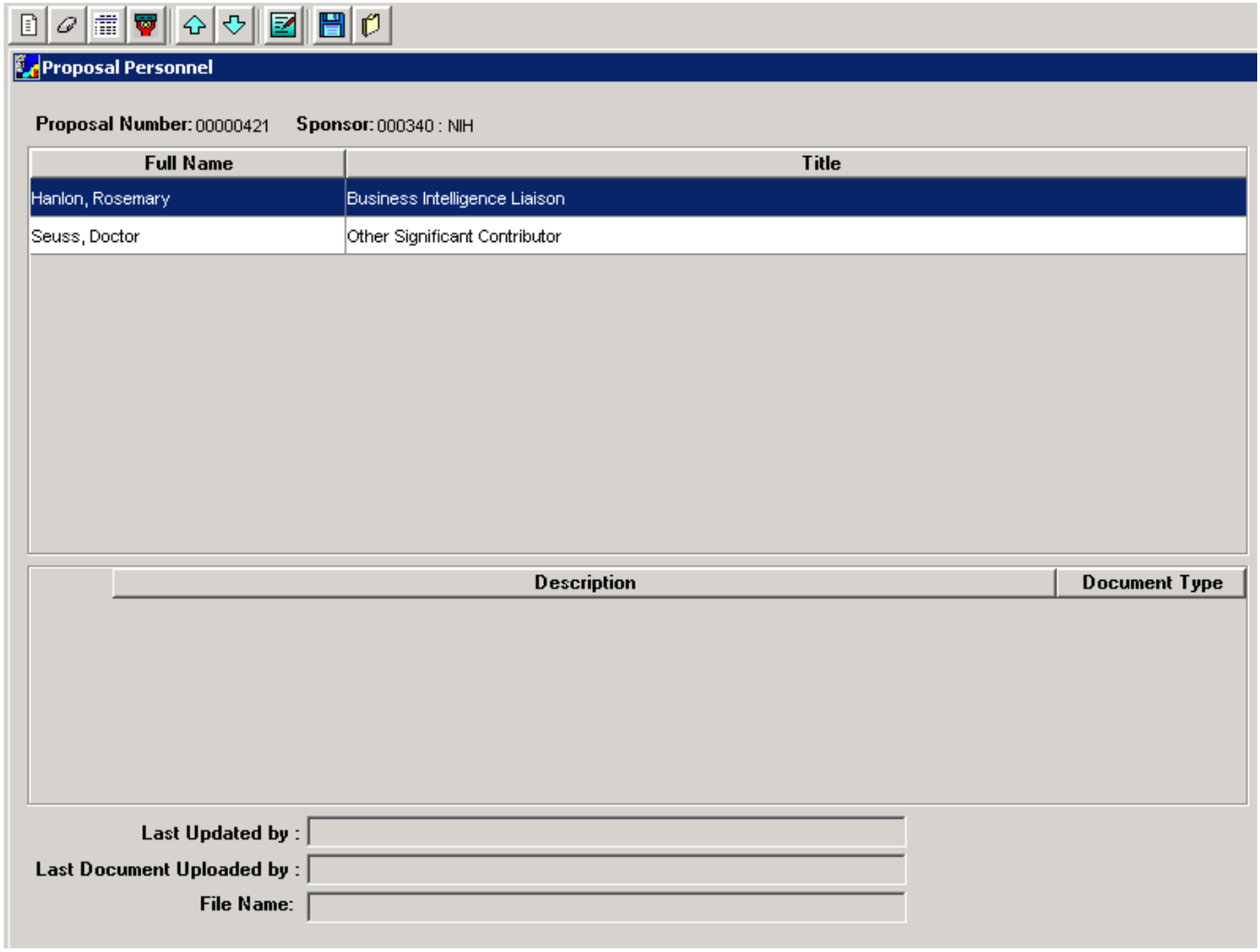
Click on the Name of a Key Person to select:

a. Click on the unit to be deleted
b. Click **Delete Unit**.
c. Click 'Yes' to the prompt to confirm that you wish to delete the unit.

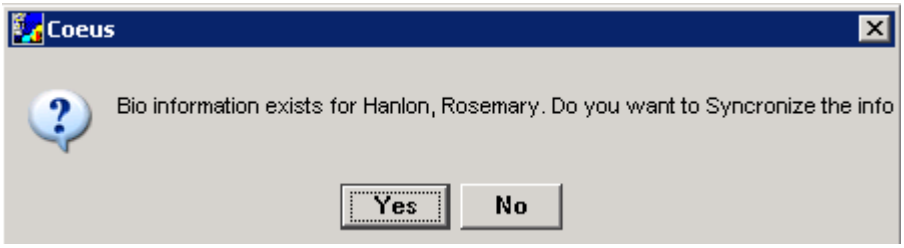
Uploading a Personnel Attachment

Personnel attachments may be required for everyone listed in the INVESTIGATOR and KEY PERSON tabs. Refer to the sponsor's requirements for the format, content, and length of the documents to upload.

1. Click the **Proposal Persons** icon or select **Edit > Proposal Personnel…**. The PROPOSAL PERSONNEL window opens, displaying a list of all names entered in the INVESTIGATOR and KEY PERSON tabs.



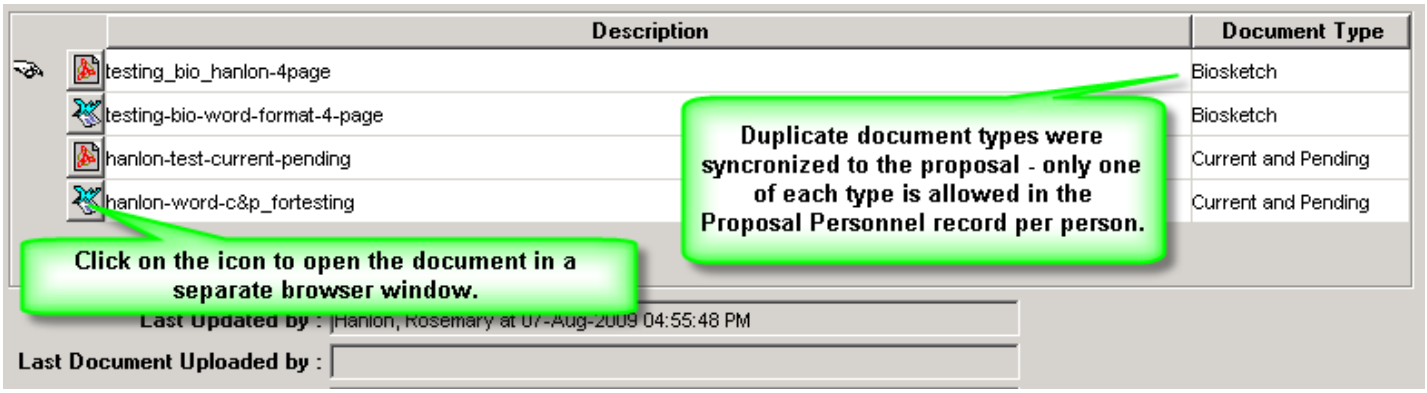
2. If the Investigator or Key Persons have maintained biographic documents in Coeus, you will have the option to synchronize those files to your proposal. For instructions on maintaining bio information documents, see Maintaining Person Documents (see Maintain Department Personnel, page 126).



   a. Click “Yes” to download the maintained files. These files can be deleted if they are not current or relevant. Only one record of each document type is allowed. If duplicate document types are synchronized, duplicates will need to be deleted in order to save and close this screen.

   b. Click “No” to close the window without adding the synchronized files for this person.

3. Click on the Attachment icon beside each entry to preview the file and determine if it should be retained, modified & re-uploaded, or deleted entirely (see Deleting Personnel Attachments, page 36).



4. Upload personnel attachments.

   a. Click a name in the list to select it.

   b. Click the **Add Module** icon or select **Edit > Add Module**. A blank module line, with a blinking cursor, is inserted at the bottom of the screen for the selected name.

   c. Enter a description in the **Description** field. This will be the file name for the uploaded document, so do not use any special characters (See *What "No Special Characters" Means*, page 142).

   d. Make a selection in the **Document Type** drop-down list. The options are

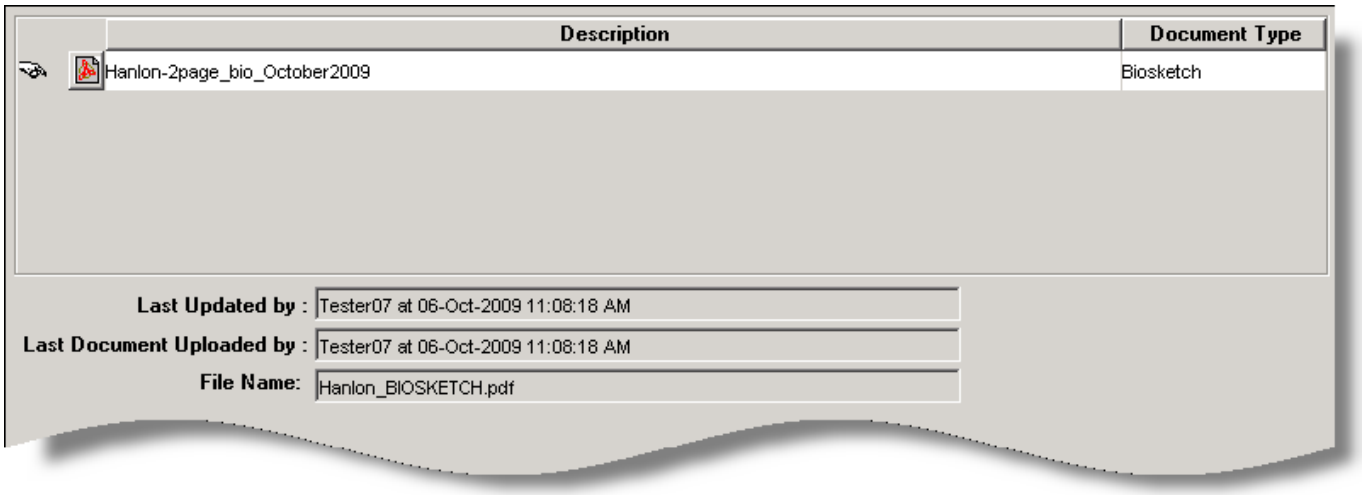
Document Type	Description
Biosketch	See sponsor instructions
Current and Pending	See sponsor instructions
Budget Details	Sponsor specific
Statement of Commitment	Sponsor specific
Other	Sponsor specific

.
.

   e. Click the **Upload Attachment** icon or select **Edit > Upload Attachment**. A file browser window opens.

Note: While any file type can be uploaded, PDF is required for certain Grants.gov forms. Check the sponsor instructions for requisite file formats. SRS recommends using PDF when possible.

   f. Select the file and click **Open**. The file browser window closes, and the icon for the uploaded file type displays on the module line.



g. Repeat steps *a* through *f* to upload any required personnel attachments for each person listed in the PROPOSAL PERSONNEL window.

h. In the lower portion of the screen, for the **Person** and **Document Type** line selected

1. **Last Updated by** describes when the document type was last altered
2. **Last Document Uploaded by** is the timestamp of the upload
3. **File Name** the name of the file uploaded

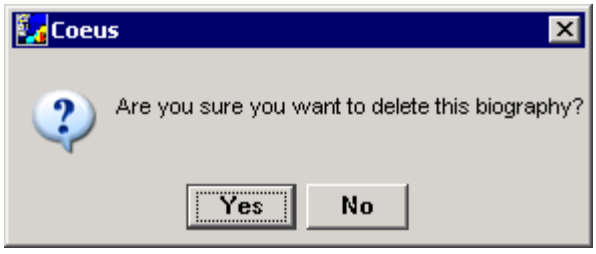
5. The order in which names appear in this window is the order in which they will be published on forms. To change the order:

a. Click a name to select it.

b. Click the **Move Up** or **Move Down** icon to change the name's position in the list.

Deleting a Personnel Attachment

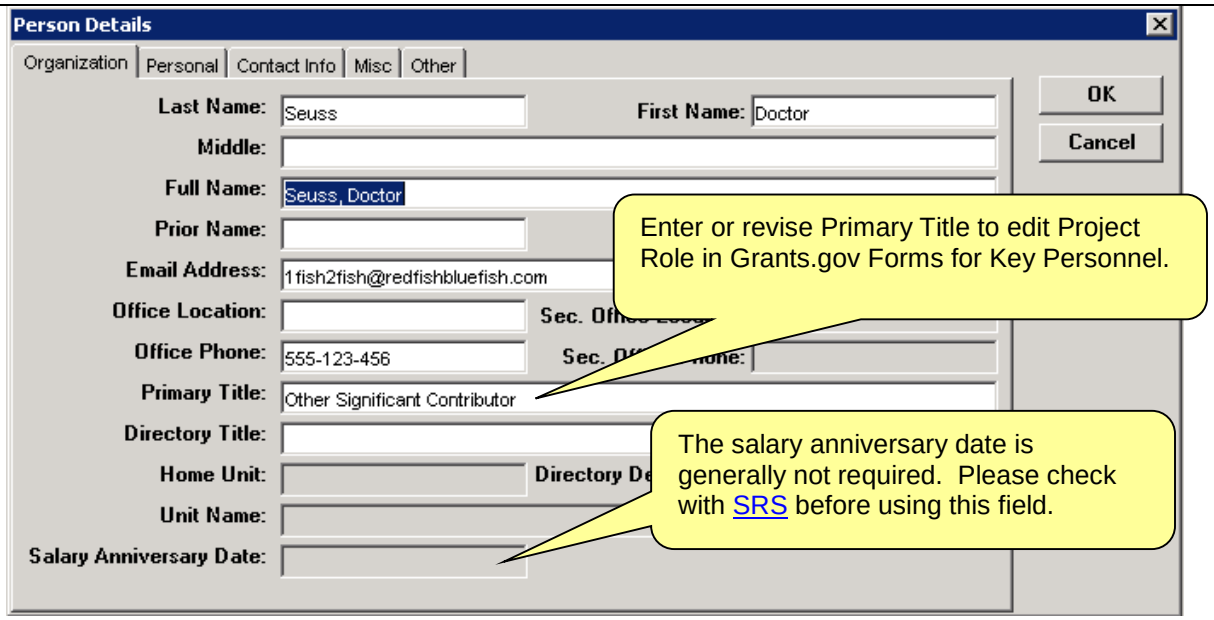
1. Click the **Proposal Persons** icon or select **Edit > Proposal Personnel…**. The PROPOSAL PERSONNEL window opens, displaying a list of all names entered in the INVESTIGATOR and KEY PERSON tabs.
2. Select the name of the person whose personnel attachment you will delete. All uploaded attachments for this person display at the bottom of the window.
3. Click to select the attachment to delete.
4. Click the **Delete Module** icon or select **Edit > Delete Module**. This confirmation message displays.



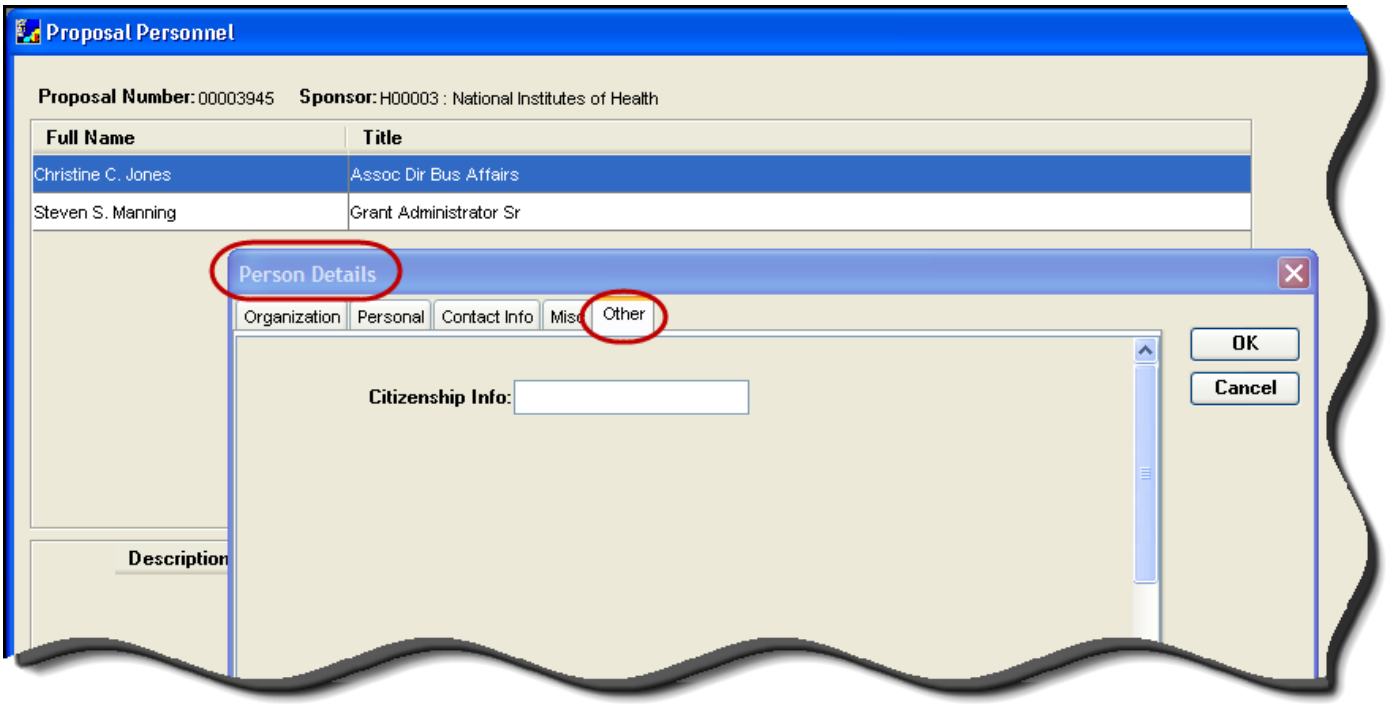
5. Click **Yes** to delete the attachment or **No** to stop the operation.

Edit Proposal Person Details

1. Click the **Proposal Persons** icon or select **Edit > Proposal Personnel…**. The PROPOSAL PERSONNEL window opens, displaying a list of all names entered in the INVESTIGATOR and KEY PERSON tabs.
2. Select the name of the person whose name or other contact data requires revisions. For example: Rolodex persons may require edits.
3. Select **Edit > Person Details**. The PERSON DETAILS window opens. Make the necessary edits in the fields with white backgrounds. Click on the tabs (Organization, Personal, Contact Info, Misc., Other) to review all the person data maintained in Coeus. Note: Entries in Person Details will *update this proposal only* – not maintained institutional data or data in Coeus Person table.

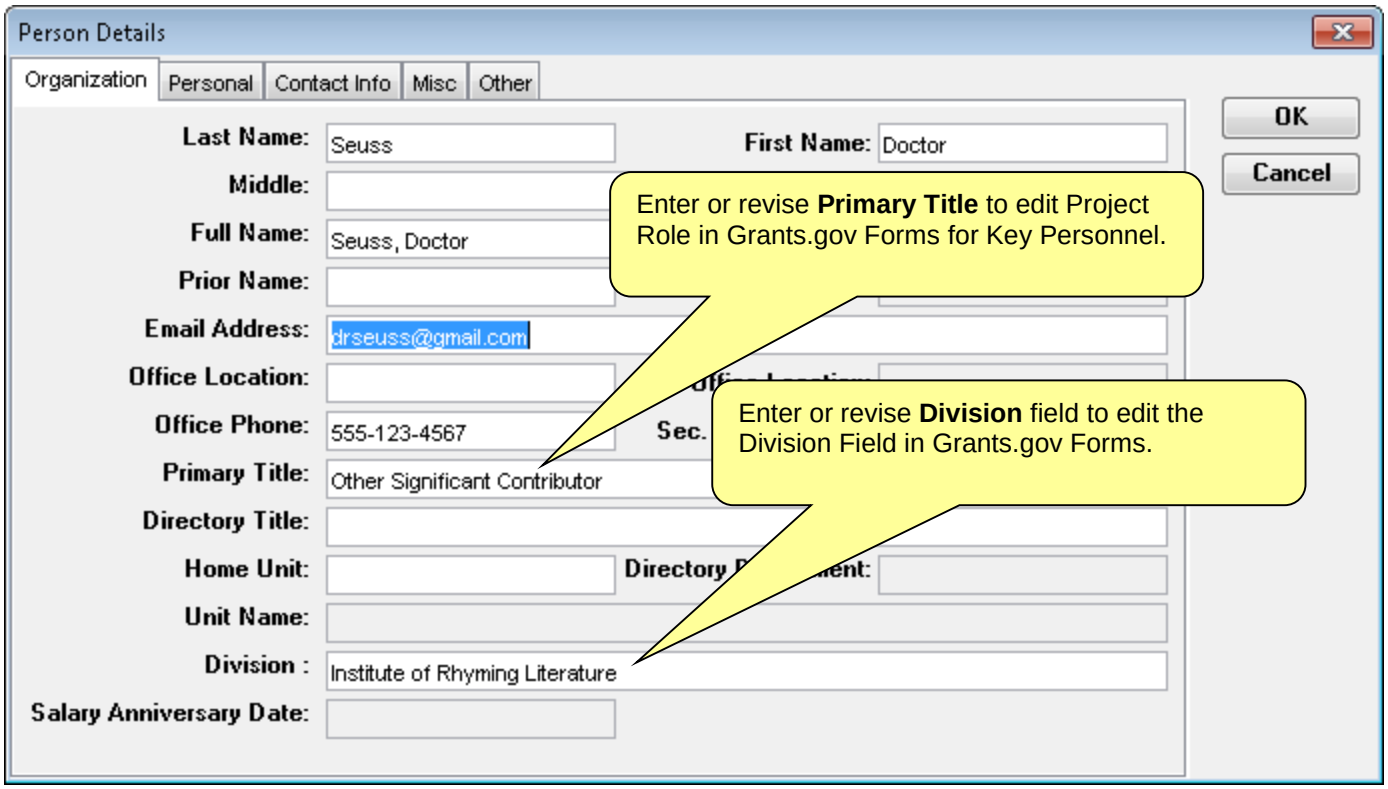


4. Click on the CONTACT INFO tab to maintain the **Agency Credentials**. For system-to-system submissions (s2s) utilizing the RR Senior/Key Person Profile form, this field populates the "Credential; e.g. agency login" field, such as the eRA Commons user name.
5. Click on the OTHER tab to maintain citizenship information. This is generally not required.

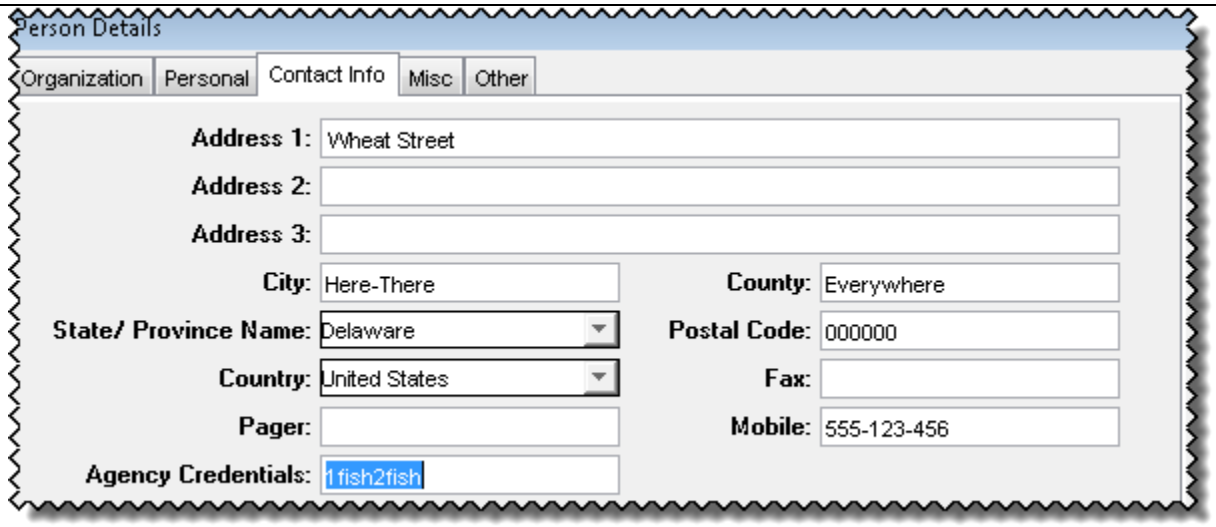


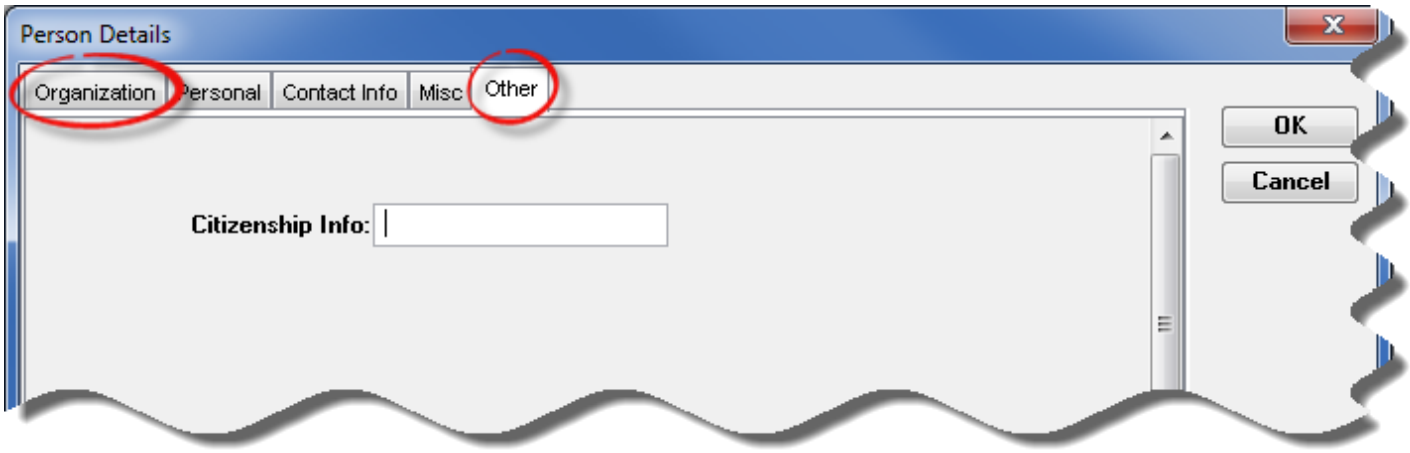
Edit Proposal Person Details

1. Click the **Proposal Persons** icon or select **Edit > Proposal Personnel…**. The PROPOSAL PERSONNEL window opens, displaying a list of all names entered in the INVESTIGATOR and KEY PERSON tabs.
2. Select the name of the person whose name or other contact data requires revisions. For example: Rolodex persons may require edits.
3. Select **Edit > Person Details**. The PERSON DETAILS window opens. Make the necessary edits in the fields with white backgrounds.
    - Click on the tabs (Organization, Personal, Contact Info, Misc., Other) to review all the person data maintained in Coeus. Note: Entries in Person Details will *update this proposal* ***only*** – not the maintained institutional data or data in Coeus Person table.
    - **Division** field has been added to the **Organization** tab this field can be modified to support Grants.gov forms RR Key Person Expanded (all entries); SF 424(R&R) (PI); SF 424 (PI)
        i. - For Rolodex person (non-employee), Division field default as "Unknown". Users can edit at the proposal level if the field is maintained to the Proposal Person Editable Columns code table.
        ii. - For non-Rolodex person (employee), this field will use the person's home unit as listed in the HR system.
    - Salary Anniversary Date: this field supports the alternate salary inflation method where individual salary anniversaries are used instead of the date associated with the salary category. This field is generally not used. Please contact SRS before entering data here.



4. Click on the CONTACT INFO tab to maintain the **Agency Credentials** field (renamed from **eRA Commons User Name)**. 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.

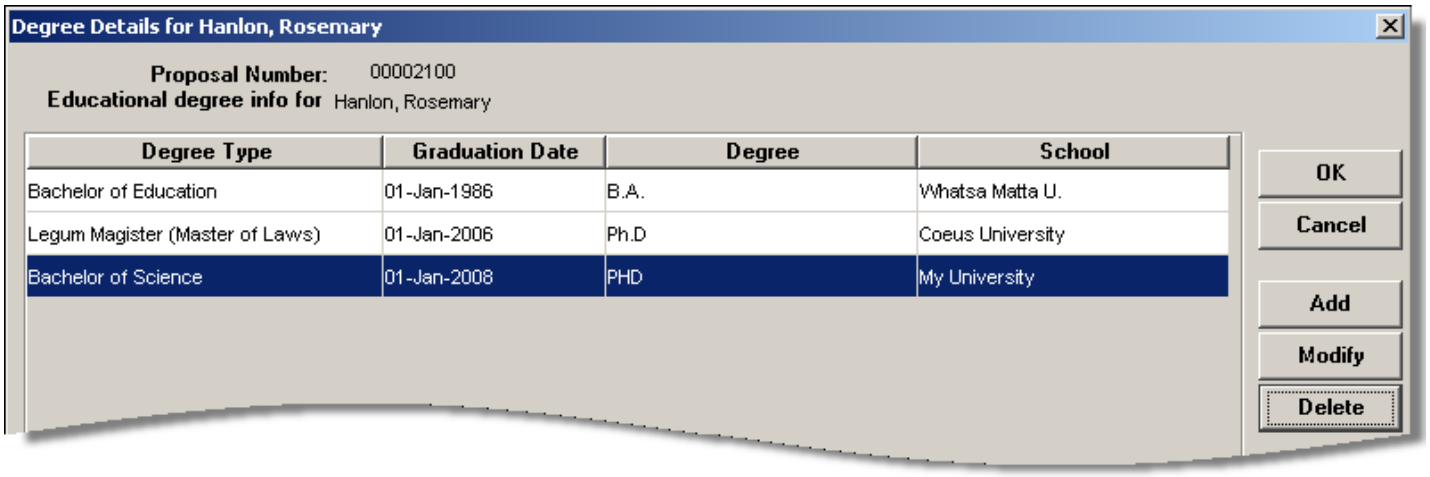


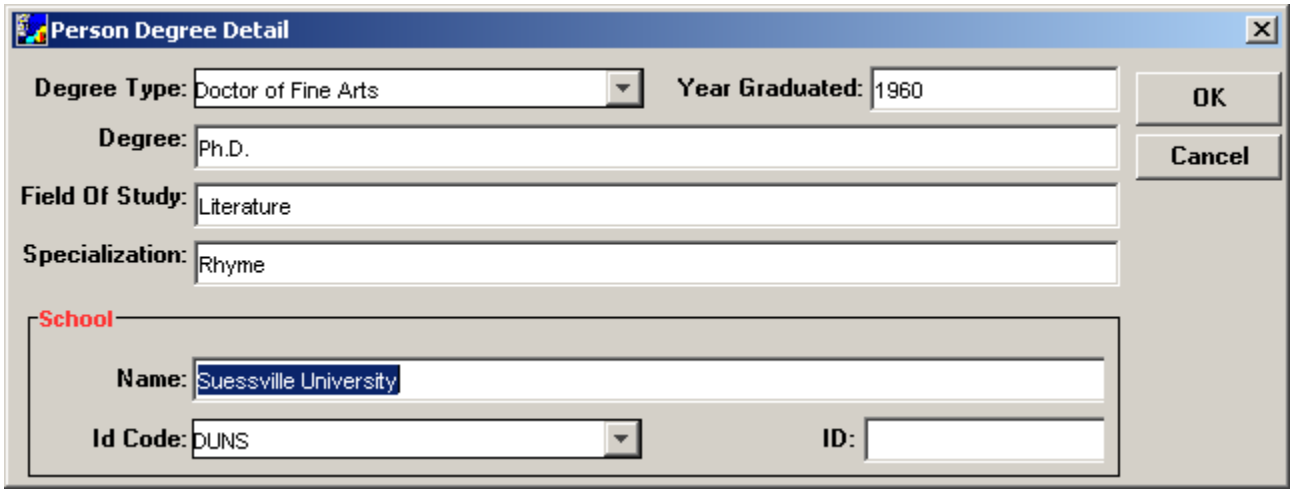


5. Click on the OTHER tab to maintain **Citizenship.** This supports information required for completing certain forms, but is generally not used.
6. Click **OK** to save and close the Person Details window.

Edit Proposal Person Degree Info

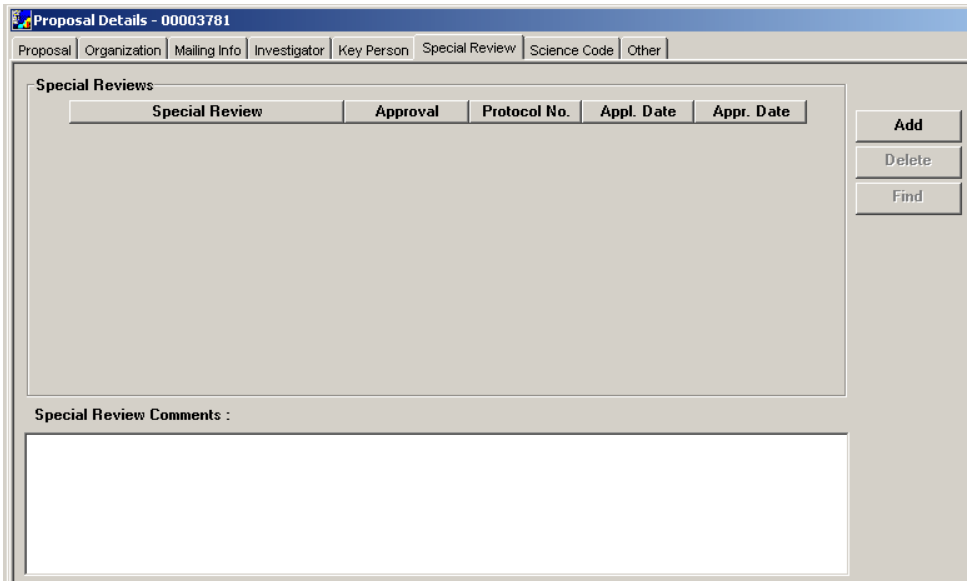
1. Click the **Proposal Persons** icon or select **Edit > Proposal Personnel**. The PROPOSAL PERSONNEL window opens, displaying a list of all names entered in the INVESTIGATOR and KEY PERSON tabs. Degree information is not typically required.
2. Select the name of the person whose degree data requires revisions or entries. For example: Rolodex persons will have no degree data.
3. Select **Edit > Degree Info**. The DEGREE INFO FOR (PERSON SELECTED) window opens.
   a. Click **Add** to enter a new Degree
      i. In the PERSON DEGREE DETAIL window, complete the entries and then click **OK** to save or **Cancel** to close without saving. (See screen shot for entry fields)
   b. Click **Modify** to revise an existing Degree entry
   c. Click **Delete** to remove an existing Degree Entry
   d. Click **OK** to save the changes or close the window
   e. Click **Cancel** to close the window without saving changes





Special Review Tab

The SPECIAL REVIEW tab identifies research that requires special review or approval (compliance), such as work with human subjects, animals or recombinant DNA.



Adding Special Review Details

1. Open the SPECIAL REVIEW tab of the PROPOSAL DETAILS screen.
2. Click **Add**. A blank line is inserted in the **Special Reviews** section.
3. Insert details in these fields:

- **Special Review** — Select a category for the special review from the drop-down list. The categories are:

Special Review
American Recovery & Investment Act
Animal Usage
Biohazard Materials
Financial Conflict of Interest
Foundation Relations
General Counsel
Human Subjects
Intellectual Property Office
Radioactive Isotopes
Recombinant DNA

- **Approval** — Select the current status of the special review from the drop-down list. The status categories are:

Approval	Description
ARRA	American Recovery & Investment Act
Approved	Review complete
Exempt	Review approved as exempt
Not yet applied	Not appropriate for NIH proposals
Pending	No status (no submittal or approval)

- **Protocol** — If you have a protocol number, enter it here.
- **Appl. Date** — If the application has been submitted for review, enter the date applied.
- **Appr. Date** — If approval has been granted, enter the approval date.

- **Special Review Comments —** If the status in the **Approval** field (see above) is **Exempt**, this field must contain *only* the exempt code. If there are multiple codes, separate them with commas (for example: **E4, E6**). If the protocol is from another institution, such as CCHMC, enter the name of the granting institution.

Repeat steps *2* and *3* to add other special reviews. Click the **Save** icon or select **File > Save**.

Updating a Special Review Line

Open the SPECIAL REVIEW tab of the PROPOSAL DETAILS screen, and then click to select the line to update. Change the details of any field. If you are updating comments, be sure to select the correct line before making the change.

Click the **Save** icon or select **File > Save**.

Delete a Special Review Line

Open the SPECIAL REVIEW tab of the PROPOSAL DETAILS screen and then click to select the line to update.

Click the **Delete** button - be sure to select the correct line before making the change.

Click the **Save** icon or select **File > Save**.

Science Code

Enter the Science Code for NSF proposals only.

Other Tab

Enter your NSPIRES User ID for NASA submissions only.

Abstracts

UC is not using the Abstracts section at this time.

Using Grants.gov

Grants.gov is a central source for information on thousands of grant programs provided by 26 federal agencies.

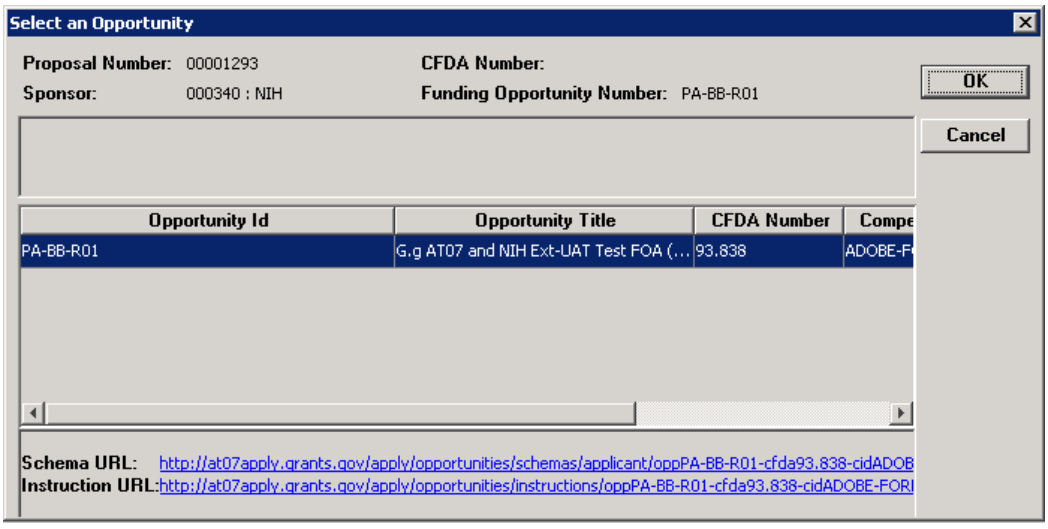
You *must* link your proposal to a valid Grants.gov opportunity before you begin uploading your proposal narratives. If you do not link your proposal first, you will not have the relevant narrative types available to choose form in the Narrative module.

Linking the Proposal to a Grants.gov Opportunity

1. Find the opportunity's CFDA number.
    a. Browse to the URL *http://www.grants.gov*.
    b. Click the **Find Grant Opportunities** link. A list of sub-links opens.
    c. Click the **Basic Search** sub-link.
    d. Enter keywords in the **Keyword Search** field and click **Search**. A list of opportunities that meet your search criteria displays.
    e. Click the link in the **Opportunity Title** column for the appropriate announcement. The CFDA number is listed in this information.
2. On the PROPOSAL tab of the PROPOSAL DETAILS screen, insert the federal sponsor code in the **Sponsor** field. If you do not know the sponsor code, do the following:
    a. Click the **Search** icon next to the field. The SPONSOR SEARCH window opens.
    b. Enter the **Sponsor Name** or **Acronym** in the appropriate column and click **Find**. The SPONSOR SEARCH RESULT tab opens with a list of sponsors and their codes.
3. Enter either a **Program No.** or **CFDA No.** in the appropriate field of the PROPOSAL tab. Do not enter *both*.

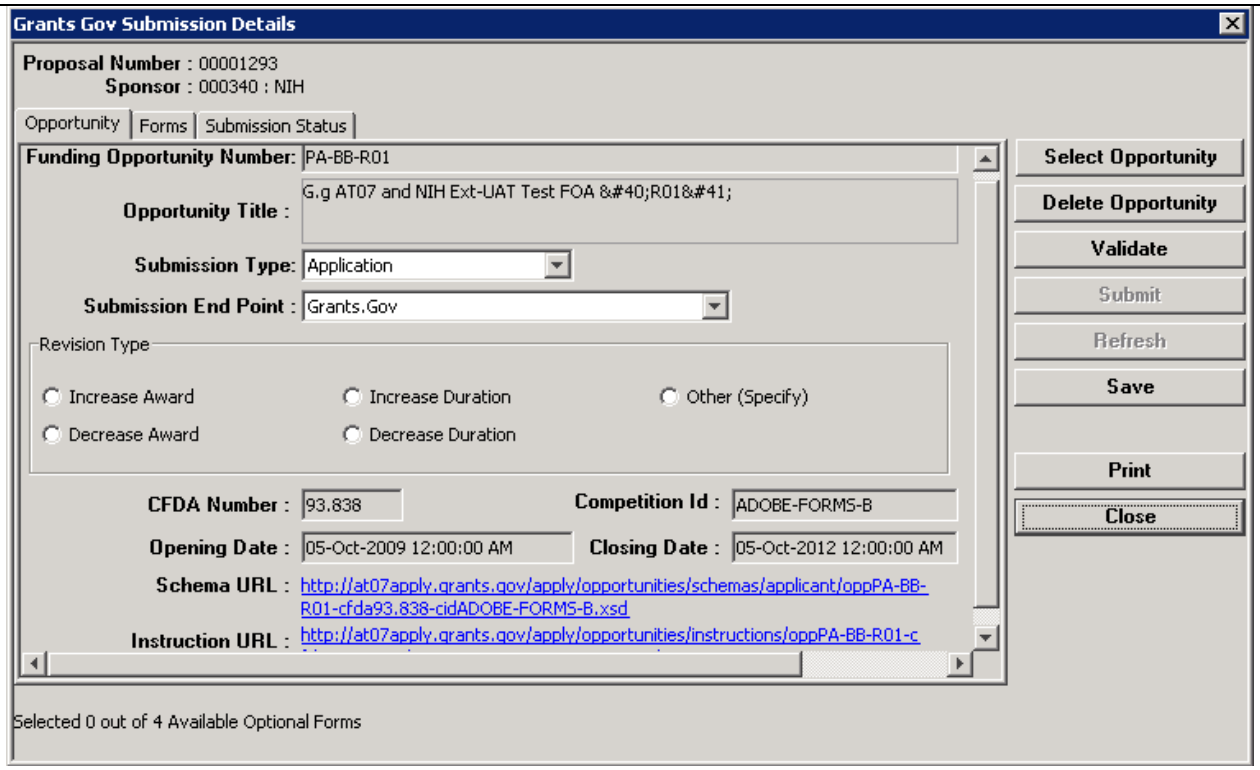
Note: Click as far to the left as possible in the **CFDA No.** field, or tab into the field. Enter the five digits of the number without the decimal point. (Coeus enters that for you.)

4. Select **Action > Grants.gov**. The SELECT AN OPPORTUNITY window opens.



5. Select the opportunity from the list (the relevant Schema & Instruction URLs display for the selected opportunity) and click **OK**. The GRANTS GOV SUBMISSION DETAILS window opens.

Note: Some sponsors (specifically NIH) do not use CFDA numbers to post each opportunity. If your search does not locate an opportunity by the CFDA number, return to Proposal Details and delete the CFDA number, insert the Program number only, and then search again.



6. In the OPPORTUNITY tab, you can click the **Instruction Page** link at the bottom of the screen to display instructions the sponsor may have provided for this opportunity. You may need to use the side scroll bar to click on the URL.
7. Click on the FORMS tab to review which mandatory and optional s2s forms the sponsor has packaged for this opportunity. For more information on s2s forms, see following section Review the Grants.gov Forms
8. If this is the correct opportunity, Click **Save**.
9. Click **Close** in the GRANTS GOV SUBMISSION DETAILS window. The window closes, and the Grants.gov logo (circled below) displays near the bottom of the PROPOSAL DETAILS screen.
10. The SUBMISSION STATUS tab will not be populated until the proposal is electronically submitted to Grants.gov.

Grants.gov Submission End Point:

The Grants.gov Submission End Point can be selected on the Grants.gov window, OPPORTUNITY Tab.

- **Submission End Point 07 must** be used for all current submissions. This is the only valid Grants.gov server address supporting s2s submissions at this time.
- **Submission End Point 06** should no longer be used, as this server is no longer active at Grants.gov.

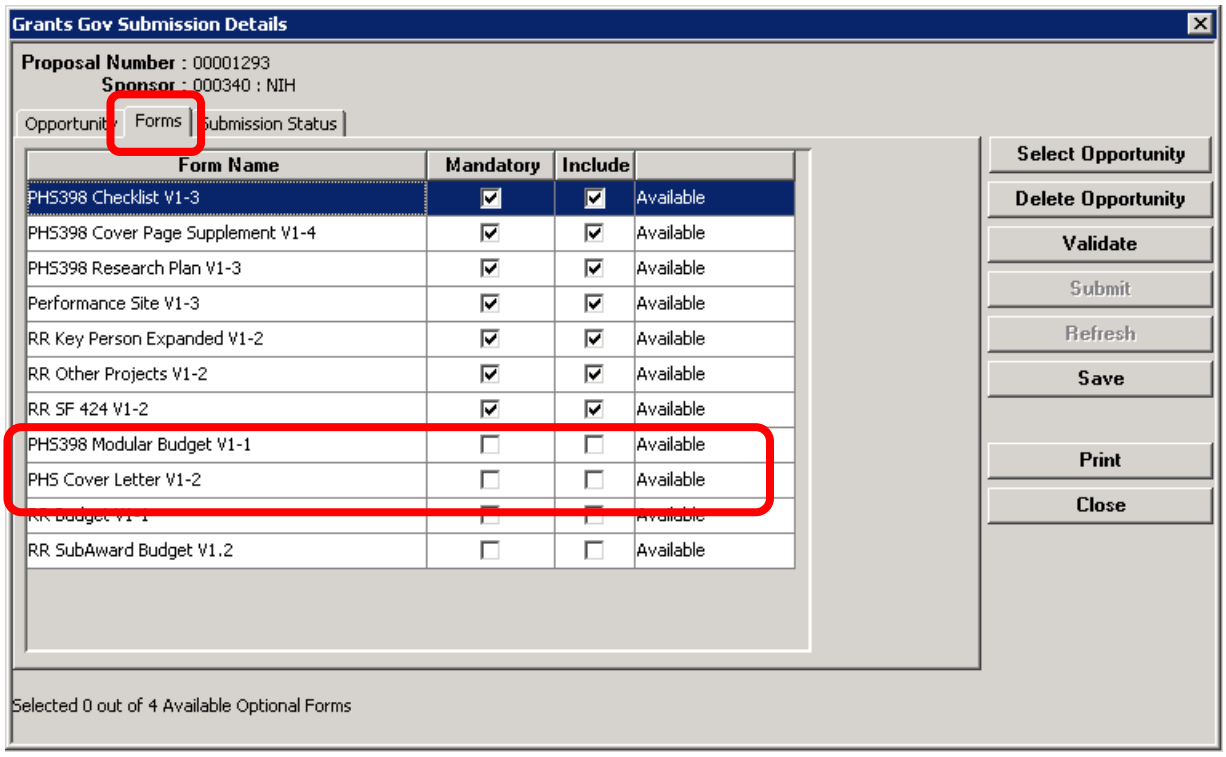
Deleting the Grants.gov Opportunity

1. On the PROPOSAL tab of the PROPOSAL DETAILS screen, if it has been deleted or changed to a non-federal sponsor, insert a federal sponsor code in the **Sponsor** field.
2. Enter either a **Program No.** or a **CFDA No.** Do not enter both.
3. Select **Action > Grants.gov**. The GRANTS.GOV window opens.
4. Click **Delete Opportunity**.
5. Click **Save**. The GRANTS.GOV window closes, and these changes are made to the PROPOSAL DETAILS screen: the Grants.gov logo is removed and the **Program No.**, **CFDA No.**, and **Program Title** fields are cleared.

Review the Grants.gov Forms

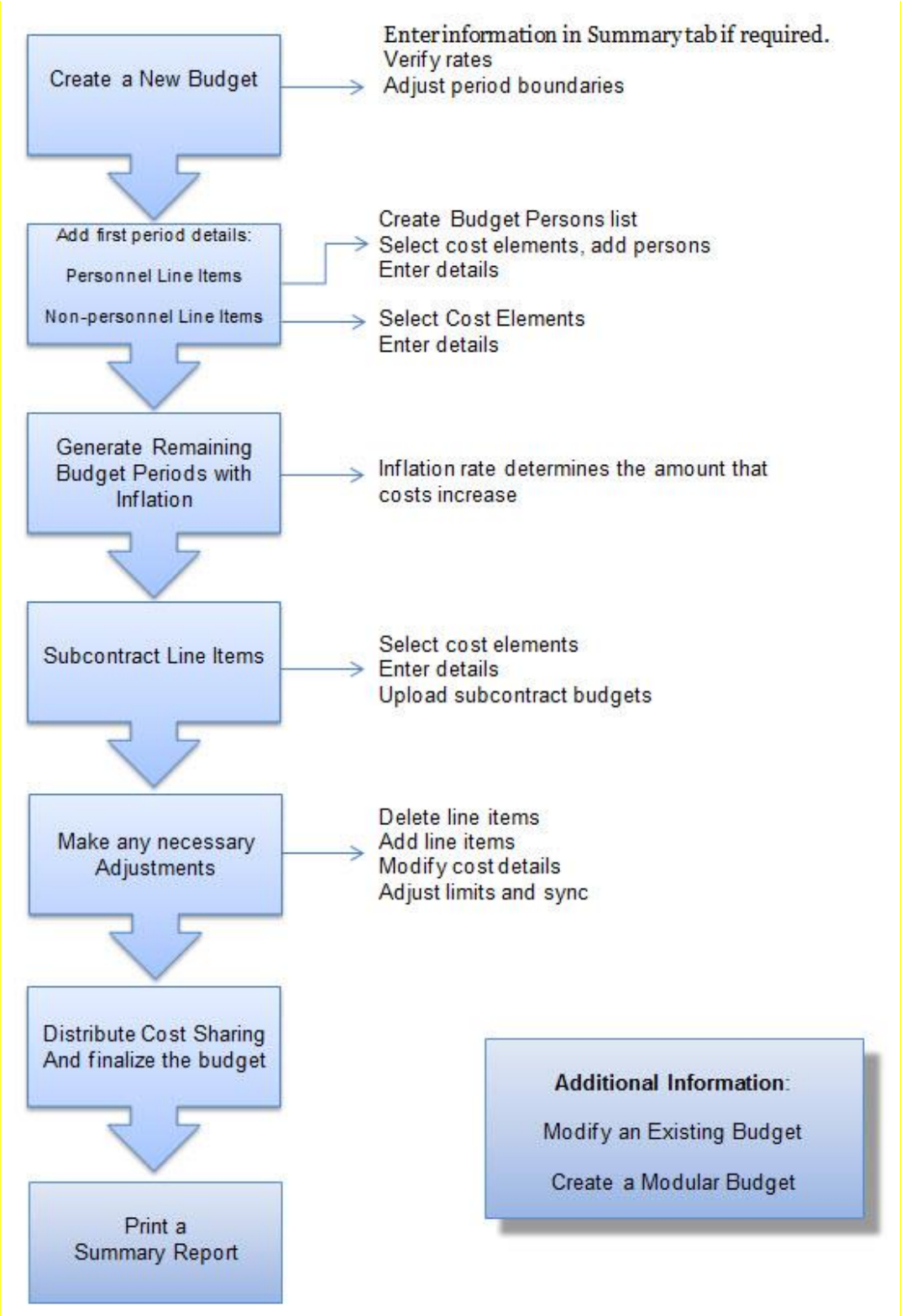
A proposal is eligible for electronic submission via Grants.gov if all mandatory forms are available. If a form is mandatory but not available, the proposal is not eligible for Coeus s2s submission to Grants.gov.

1. From a proposal that is connected to Grants.gov (the Grants.gov logo is displayed near the bottom of the PROPOSAL tab in the PROPOSAL DETAILS screen), select **Action > Grants.gov**. The GRANTS GOV SUBMISSION DETAILS window opens. If the proposal is not connected to Grants.gov, connect it by following the instructions in *Linking the Proposal to a Grants.gov Opportunity*, page *43*, and then return to these instructions.
2. Click the FORMS tab. A list of forms displays.
3. Check that all forms marked Mandatory are also tagged Available.
4. Click the box in the **Include** column (circled) to add this Optional form to your application.



Overview of the Budget Process

The process of creating a new budget includes the steps shown below. This chapter also includes information about copying and modifying an existing budget and about creating a modular budget.



Budget Screen

The budget screen (CREATE BUDGET FOR PROPOSAL or MODIFY BUDGET FOR PROPOSAL) consists of a SUMMARY tab, TOTAL tab, and a tab for each budget period.

Icons specific to creating and modifying the budget are on the second toolbar (see *Coeus Interface*, page 9). That toolbar is shown here. Icons are shown when they are used in the instructions that follow.

Opening a Budget

Whether you are creating a new budget, creating a new version, or modifying a budget, you have a choice of two methods for opening a budget:

- Search for the proposal. Highlight it in the DEVELOPMENT PROPOSAL LIST screen and select **Edit > Budget**.
- If you have the proposal open, from the PROPOSAL DETAILS screen click the **Proposal Budget** icon or select **Edit > Budget…**.

If another user is working on the proposal, use Edit >Budget. This allows you to open the budget in Modify mode if another user is not modifying the budget. If you are the only person working on this proposal, you can use either method.

Typically when you open a budget the SELECT BUDGET window opens. In some special situations other windows open first.

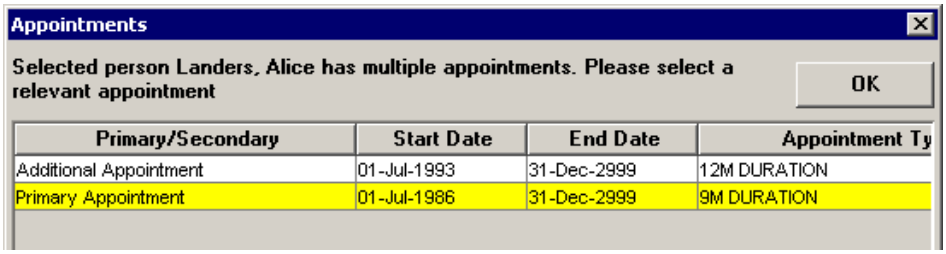
Special Situations When Opening a Budget

These windows might open before the SELECT BUDGET window.

Appointments Window

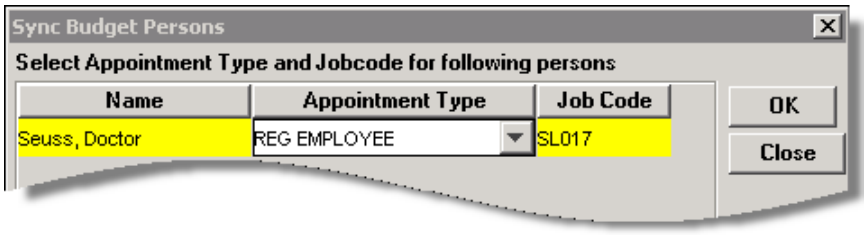
This occurs when someone listed on the INVESTIGATOR tab or the KEY PERSON tab has more than one appointment.

- Select the **Primary Appointment** or the one appropriate for the current proposal for all other employees. Click **OK**.
- Delete the appointment you don't need for this proposal.



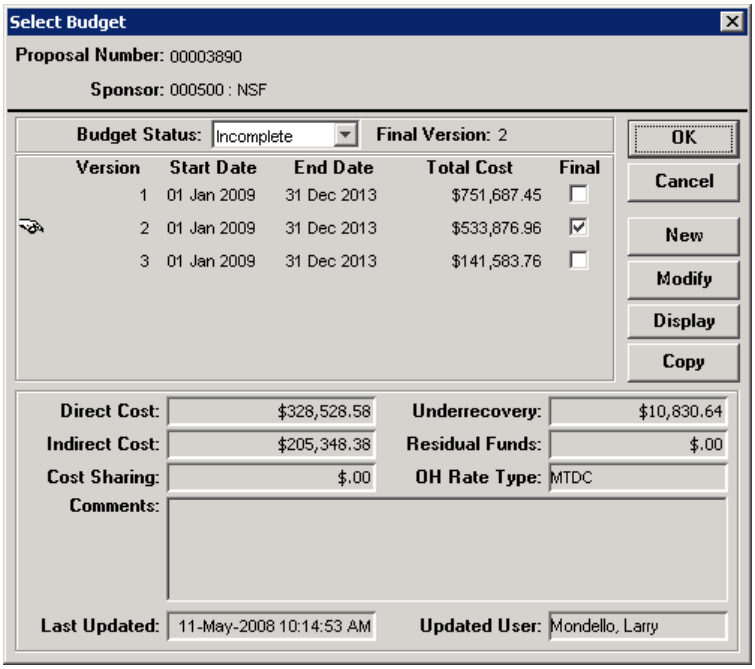
Sync Budget Persons Window

- Accept the Coeus suggested code, or enter a **Job Code** and click **OK**.



Select Budget Window

The SELECT BUDGET window contains the fields and buttons listed below.



- **Proposal Number** — Supplied by Coeus when the proposal is created.
- **Sponsor** — Entered in the PROPOSAL tab of the PROPOSAL DETAILS screen.
- **Budget Status** — Remains at **Incomplete** until you change it.
- **Final Version** — The budget version you select to send to the sponsor.
- **Pointing hand icon** — This icon points to the selected budget version.
- **Version** — Budget versions are numbered sequentially by Coeus.
- **Start Date** — Entered in the PROPOSAL tab of the PROPOSAL DETAILS screen. Can be changed on the Summary Tab.
- **End Date** — Entered in the PROPOSAL tab of the PROPOSAL DETAILS screen. Can be changed on the Summary Tab.
- **Total Cost** — Calculated by Coeus.
- **Final** (checkbox) — The budget version you select to send to the sponsor.
- **OK** — Save changes and close the SELECT BUDGET window.
- **Cancel** — Close the SELECT BUDGET window without saving.
- **New** — Create a new budget version.
- **Modify** — Open the selected budget version in modify mode.
- **Display** — Open the selected budget version in read-only mode.
- **Copy** — Copy the selected budget version to create a new version.

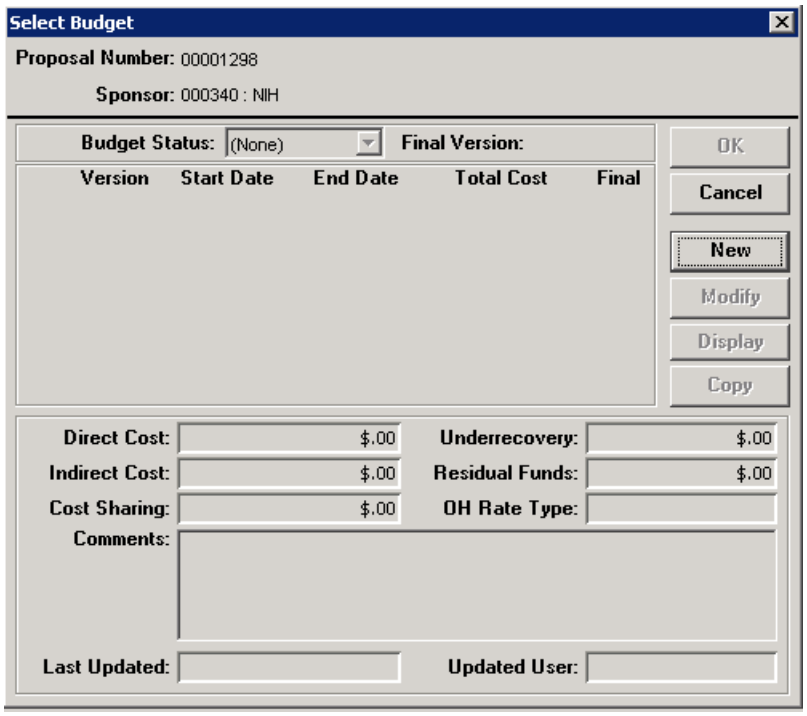
Read-Only Fields

These read-only fields display information about the selected budget version:

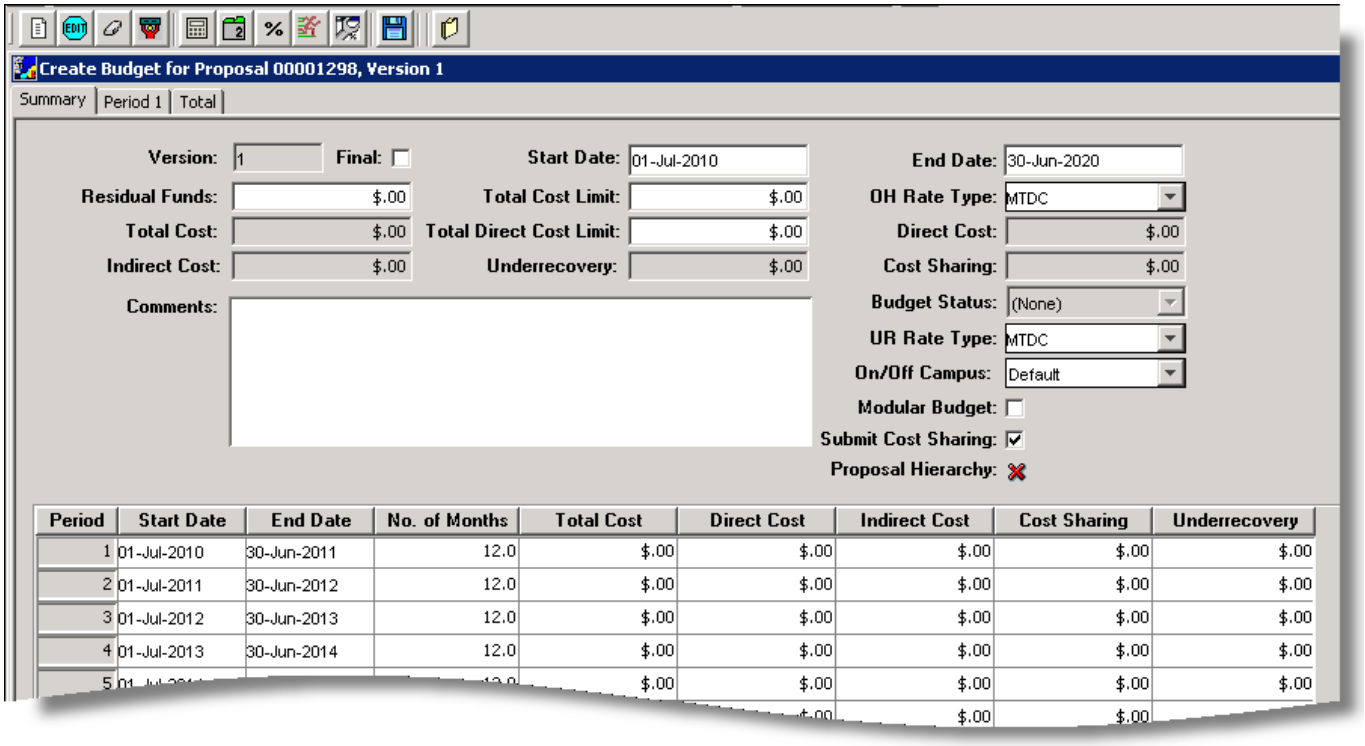
- **Direct Cost** — Calculated by Coeus from data you enter in budget line items.
- **Underrecovery** — Not used at UC.
- **Indirect Cost** — Calculated by Coeus.
- **Residual Funds** — Not used at UC.
- **Cost Sharing** — Calculated by Coeus.
- **OH Rate Type** — Select in the SUMMARY tab of the BUDGET screen.
- **Comments** — Enter in the SUMMARY tab of the BUDGET screen.
- **Last Updated** — Date and time of the last update to the budget.
- **Updated User** — Name of the user who made the last update.

Creating a New Budget

1. Open the SELECT BUDGET window (see *Opening a Budget*, page *47*).

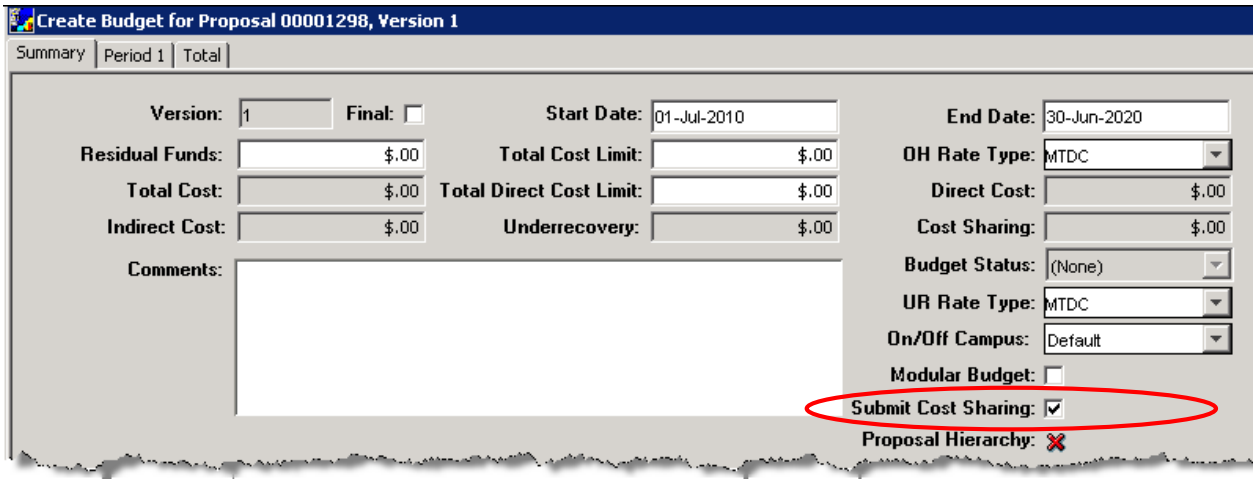


2. Click **New**. The CREATE BUDGET FOR PROPOSAL screen opens.



3. Enter information in tabs of this screen as explained in the following sections.

Entering Information in the Summary Tab



Users may need to enter information in the white, editable fields of the SUMMARY tab:

- **Start Date** and **End Date**: Coeus fills these fields with the start and end dates entered in the Details tab. Verify these dates and modify them as appropriate. See Adjust Period Boundaries, page 51, for additional information.
- **Residual Funds**: Not used at UC at this time.
- **Total Cost Limit**: You can use this field as a reminder, but it is not necessary to fill it in. This is the maximum cost (including indirect costs) to be covered by the award.
- **Total Direct Cost Limit:** You can use this field as a reminder, but it is not necessary to fill it in. This is the maximum cost direct costs to be covered by the award.
- **OH Rate Type:** Coeus displays the maintained overhead (OH) Type for the **Activity Type** selected in the PROPOSAL tab of the PROPOSAL DETAILS screen. In most cases, this rate type should be left at the displayed setting unless there is a reason to make a change.
- **Budget Status:** Displays the status. See Finalizing the Budget, page 84, for more information.
- **UR Rate Type**: Not used at UC at this time.
- **Modular Budget** (checkbox) Select this checkbox to mark this budget as an NIH modular submission style.
- **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 Grants.gov forms OR
  - Keep the box **checked** to submit all or control the inclusion of c/s expense at each **line item detail**.
- **On/Off Campus** Use the On/Off campus selection 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 one budget.

Note: If you change any of the Rates (OH, or On/Off Default) a message displays asking you to recalculate. Click **Yes**. This message also displays if you made a change to the **Activity Type** in the PROPOSAL DETAILS screen.

- **Comments**: Notes in this field can be viewed only by Coeus users and reviewers. Use these comments to distinguish between different versions of the budget. (For example, you might enter **2 Postdocs, 3 RAs** in one version and **No Postdocs, 4 RAs** in another.)

Budget Summary Tab: Read-Only Fields

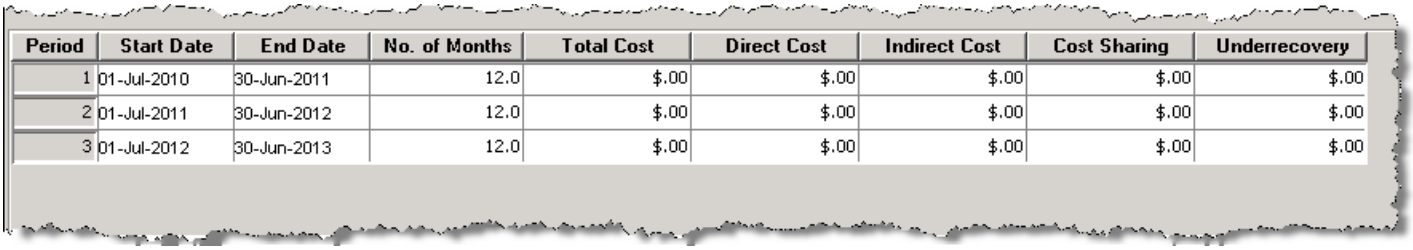
These fields in the upper portion of the SUMMARY tab display information about the selected budget version:

- **Version:** The version of the budget.
- **Total Cost**: Sum of costs in all periods, calculated by Coeus from data entered in the budget.
- **Direct Cost**: Total of direct costs in all periods, calculated by Coeus from data entered in the budget.
- **Indirect Cost**: Total of indirect costs in all periods, calculated by Coeus from data entered in the budget.
- **Underrecovery**: Not used at UC.
- **Cost Sharing**: Total of cost sharing in all periods, calculated by Coeus from data entered in the budget.
- **Proposal Hierarchy**: An icon that shows the proposal's status in a hierarchy. See Linking Proposals in a Hierarchy, page 97, for more information. Please contact SRS before using Proposal Hierarchy.

Budget Summary Tab: Optionally Editable Fields

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.

If you create your proposal budget outside of Coeus then you must enter the Direct Indirect Cost as well as Cost Sharing for each budget period in the Summary.



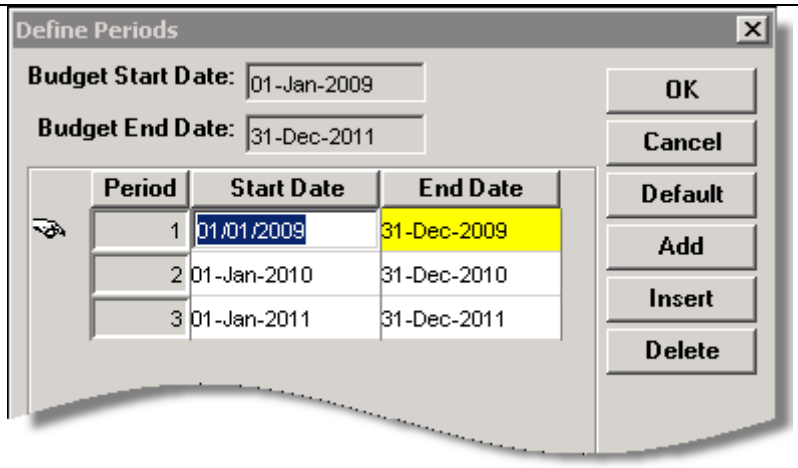
Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Jul-2010	30-Jun-2011	12.0	$.00	$.00	$.00	$.00	$.00
2	01-Jul-2011	30-Jun-2012	12.0	$.00	$.00	$.00	$.00	$.00
3	01-Jul-2012	30-Jun-2013	12.0	$.00	$.00	$.00	$.00	$.00

- **Start Date**: Budget period start date
- **End Date**: Budget period end date
- **No. of Months**: Number of months in budget period
- **Total Cost**: Budget period total costs to sponsor (direct + indirect)
- **Direct Cost**: Budget period direct cost total
- **Indirect Cost**: Budget period indirect cost total
- **Cost Sharing**: Budget period cost sharing total
- **Underrecovery**: Not used at UC at this time

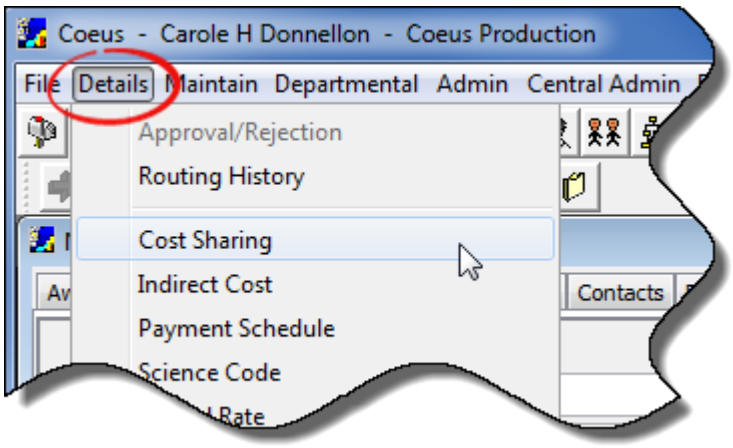
Adjusting the Budget Period Boundaries

The Coeus default creates 12-month budget periods, but you can adjust the number of periods and the number of months in each period as needed to respond to sponsor requirements. See the section on non-default budget periods for tips on those budgets.

1. Open the proposal in modify mode.
2. On the PROPOSAL tab of the PROPOSAL DETAILS screen revise the entries in the **Start Date** or **End Date** field (or both) if needed.
3. Click the **Save** icon or select **File > Save**.
4. Open the budget and select the budget version to adjust. Click **Modify**.
5. On the budget SUMMARY tab change the entry in the **Start Date** or **End Date** field or both so that the dates agree with those you entered in step *2* for PROPOSAL DETAILS.
6. Select **Budget Periods > Adjust Period Boundaries**. The DEFINE PERIODS window opens.

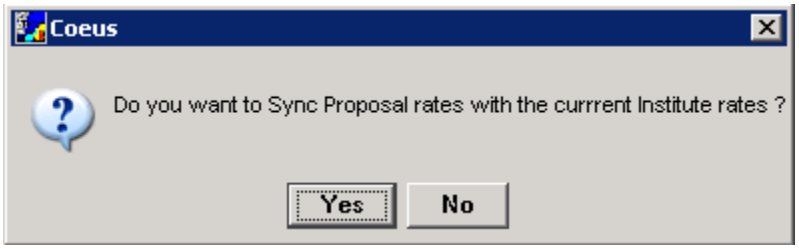


7. Use the buttons for the following actions:
    a. **Add** — Add a period at the end of the list.
    b. **Insert** — Insert a period before the selected period. The selected period has the pointing finger icon to the left and is highlighted in yellow. To select a period, click in the row.
    c. **Delete** — Delete the selected period.
    d. **Default** — Sync to the default 12-month periods defined by the **Start Date** and **End Date** on the SUMMARY tab.



TIP "Default" is the most efficient way to quickly synchronize the budget periods to 12 month increments based on the updated Start and End dates input on the Budget Summary tab.

8. Click in the **Start Date** or **End Date** field and enter or revise the date in **mm/dd/yyyy** format.
9. Click **OK** to save changes or **Cancel** to take no action. Any changes are reflected in the grid at the bottom of the SUMMARY tab.
10. A prompt appears to synchronize the proposal rates with the currently maintained rates.



    a. Click **Yes** to have the current rates applied to the rates table and calculated.

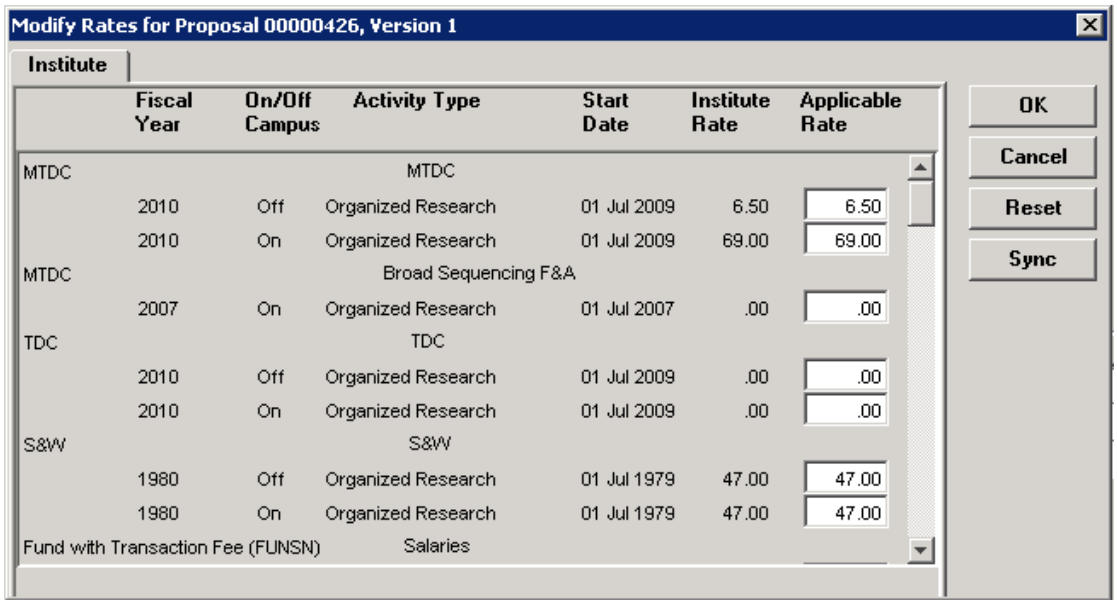
b. Click **No** if updated rates are not appropriate (this is rare); or if you intend to manually edit and sync the rates at a later time.

Verifying the Proposal Rates

The proposal rates table should be synchronized with the Institute rates before any adjustments are made. (A newly generated proposal rate table is most likely valid, but an older proposal record, or when the budget period boundaries have been adjusted, may have old rates that require synchronizing.)

Syncing the Proposal Rates to the Institute Rates

1. Click the **Maintain Rates for the Proposal** icon % or select **Edit > Rates…**. The MODIFY RATES window opens.



2. Click **Sync**. A verification message opens: “Do you want to Sync Proposal rates with the current Institute rates?”
3. Click **Yes**. The message window closes and focus returns to the MODIFY RATES window.
4. Click **OK**. A verification message opens: “Saving will entail recalculation of the budget. Continue?”
5. Click **Yes**. The MODIFY RATES window closes and the budget is recalculated.

Adjusting the Proposal Rates

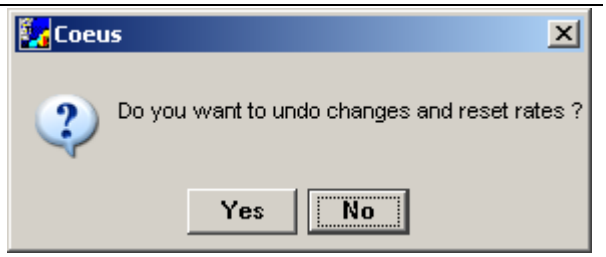
If you change a rate, change it for each relevant fiscal year, both on and off campus. You must have Proposal Budget Rates rights to change the F&A rates.

1. Click the **Maintain Rates for the Proposal** icon % or select **Edit > Rates…**. The MODIFY RATES window opens (see above).
2. Change a rate by clicking in the appropriate **Applicable Rate** field and entering the new rate.
3. Click **OK**. A verification message opens: “Saving will entail recalculation of the budget. Continue?”
4. Click **Yes**. The MODIFY RATES window closes and the budget is recalculated.

Returning to Default Rates

To return to the default rates, open the MODIFY RATES window and click **Reset**.

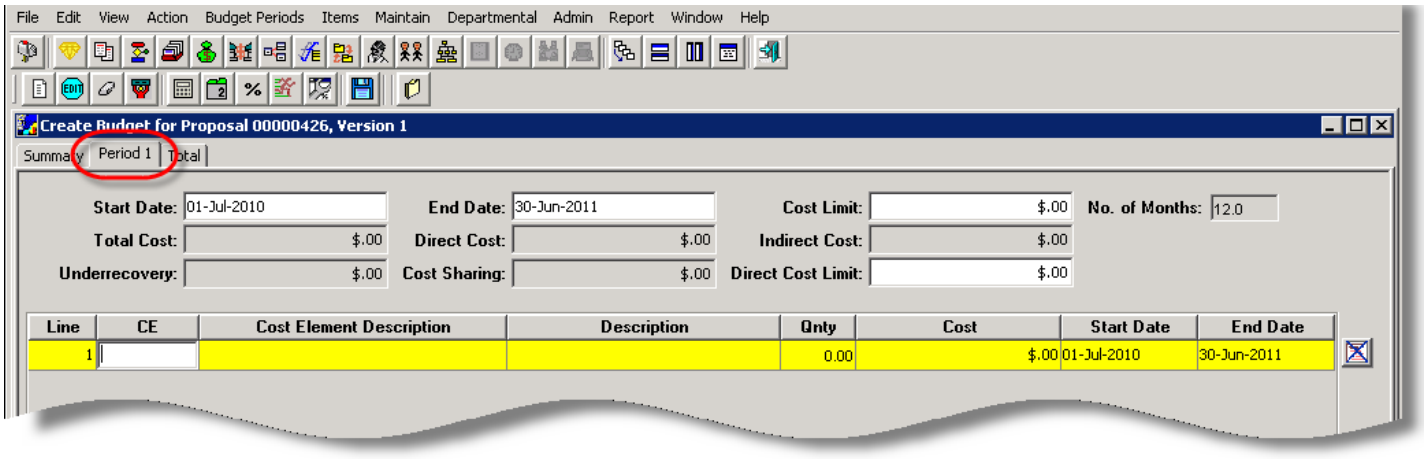
1. A verification message opens to confirm you want to undo changes, whether you have made changes or not.
2. Click Yes. The message window closes and focus returns to the Modify Rates window.
3. Click **OK**. A verification message opens: “Saving will entail recalculation of the budget. Continue?”
4. Click **Yes**. The MODIFY RATES window closes and the budget is recalculated.



Creating the Period 1 Budget

Budgets are defined by periods. Start by creating the budget for the first period, which you populate with line items that will recur in every period. Coeus uses Period 1 as a basis to calculate amounts for future periods, but unique expenses can be inserted in any budget period once they are generated.

To create the budget for Period 1, enter line items for personnel salary and non-personnel costs.



Adding Personnel Line Items

Adding personnel to the budget is a two-step process:

1. Create the Budget Persons List (see *Creating the Budget Persons List* below), a list of people who might be involved in the project, and
2. Create salary line items in the budget and add names from the Budget Persons list to the line items (see *Creating Personnel Line Items and Adding Names*, page *57*).

About the Budget Persons List

Several line items in the budget have to do with salaries for the faculty and staff who will be paid from the award funds. Before these line items can be included in the budget, the people must be added to the proposal.

All project personnel are included in the BUDGET PERSONS LIST window. Coeus starts populating it for you by adding the names you entered in the INVESTIGATORS and KEY PERSONS tabs of the PROPOSAL DETAILS screen. You can add other personnel as necessary. In addition, some participants do not need to be named. You use the TBA placeholders to include them in the budget.

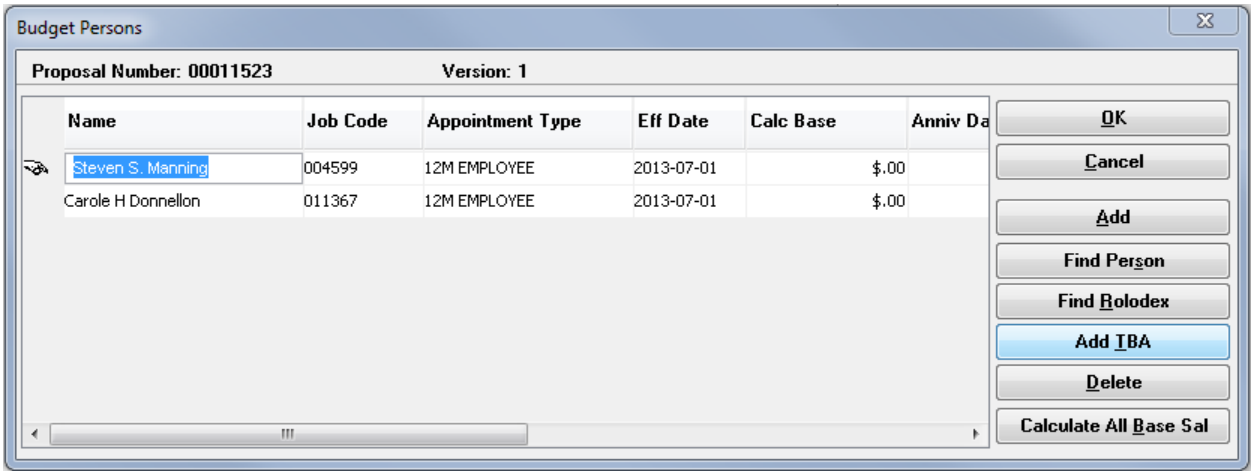
Persons in this list are included in the budget only when you add them to line items. They do not become part of the budget just by adding them to the Budget Persons list, so you can add anyone you think might be needed at some point in the project.

There are three (3) methods of adding to the Budget Persons List:

- **Find Person** accesses the Coeus Person records. The person records are automatically maintained and updated by a daily refresh from UC's HR database. Additionally, SRS ERA can manually create person records to support short-term requirements. Contact coeus@uc.edu to have a record added.
- **Find Rolodex** accesses the Coeus Rolodex. This search method allows entering external people (non-personnel) to the budget and to publish their names in proposal budget forms.
- **Add TBA** accesses the list of frequently used "to be announced" personnel types.

Creating the Budget Persons List

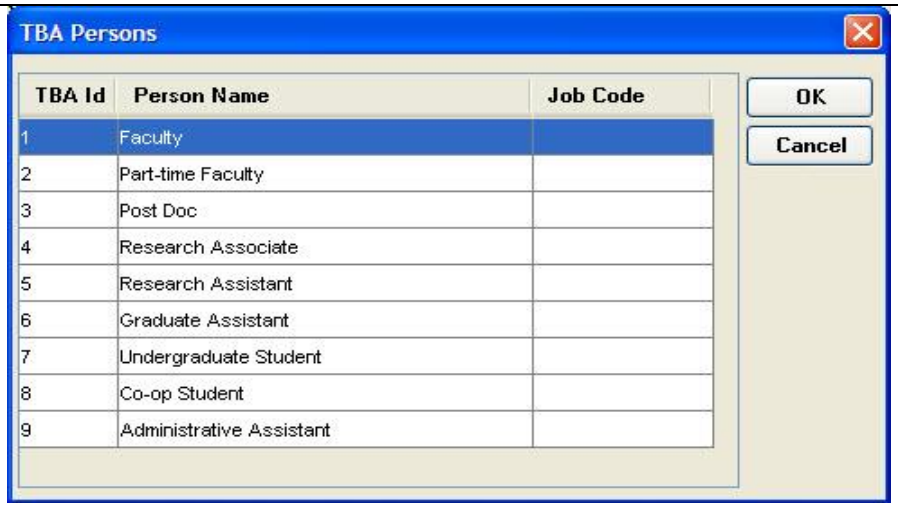
1. From the PERIOD 1 tab Click the **Budget Persons** icon or select **Edit > Persons…**. The BUDGET PERSONS window opens, with names from the INVESTIGATORS and KEY PERSONS tabs listed (see *Investigator Tab*, page 28, and *Key Person Tab*, page 32).



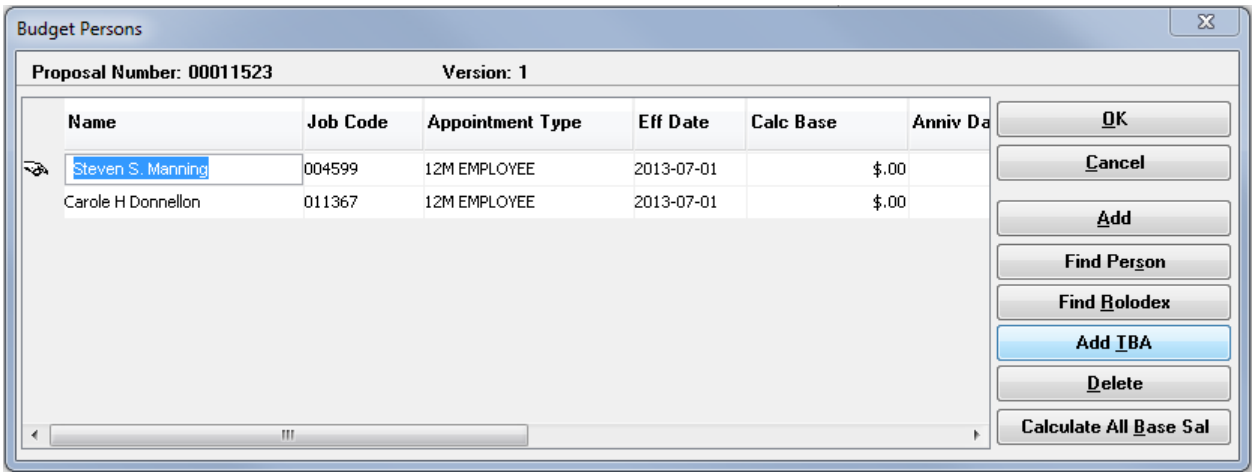
2. Add other named personnel to the list.
   - Click **Find Person**. The PERSON SEARCH window opens.
   - Enter search criteria. You can search for more than one person at a time by entering criteria in separate rows (see *Appendix: Searching in Coeus Premium*, page 131).
   - Click **Find**. The PERSON SEARCH RESULT tab opens, listing all results that meet your criteria.

   Note: Results are listed alphabetically. All results in upper case are listed first, then those in mixed case. See Searching for a Person at UC, page 135, for more information.

   - Click a name to select, or **Ctrl**+click (Macintosh use **Command**+click) to select multiple names.
   - Click **OK**. The PERSON SEARCH window closes, and the focus returns to the BUDGET PERSONS window, which now contains the names you added.
3. Add placeholders for any new hires or personnel who do not need to be named.
   - Click **Add TBA**.
   - The TBA PERSONS window opens listing the maintained To Be Announced placeholders.
   - From the list, select placeholders that reflect the positions needed.
   - Click **OK**. The TBA PERSONS window closes, and focus returns to the BUDGET PERSONS window.



4. In the **BUDGET PERSON** window, do the following for each budget person row in the list:

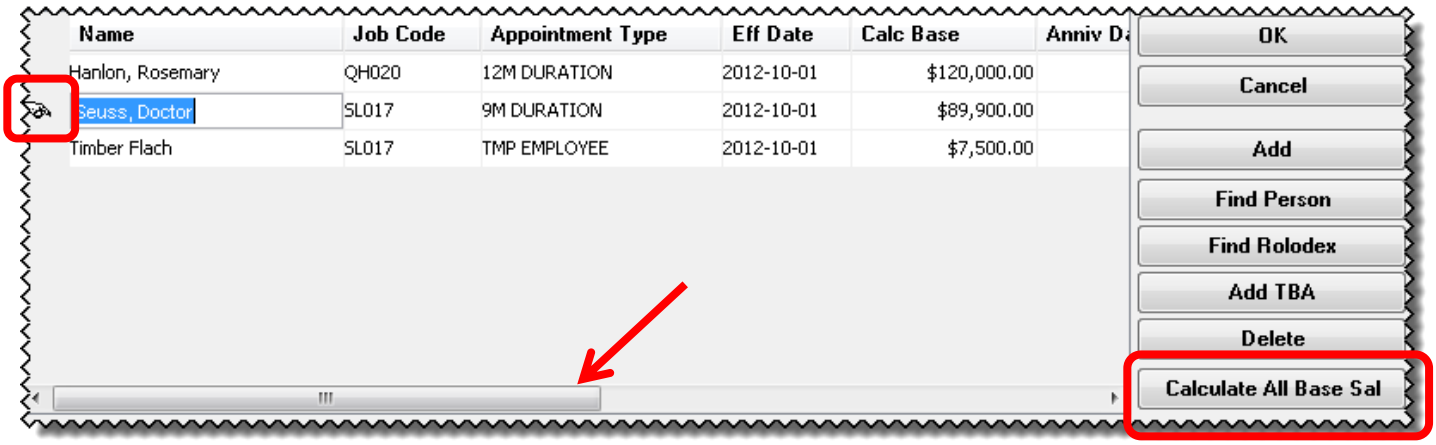


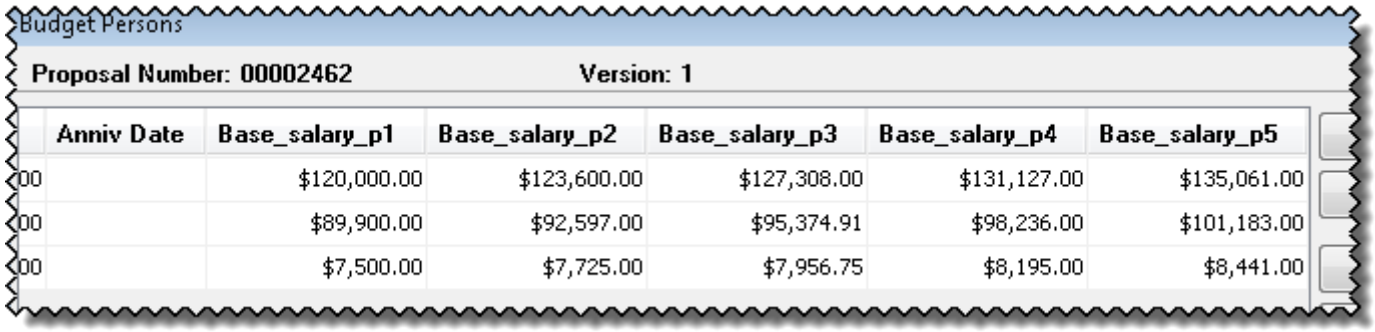
- Accept the suggested job code, or make an entry in the **Job Code** field. You can enter something meaningful to you in the field, such as **TBA1**. The entry can be a single character.
- Check the **Appointment Type** field to confirm the appointment is correct for this proposal. To change it, click in the **Appointment Type** field to display the drop-down list. The types are:

Appointment Type	Meaning	Salary Calculation Base
TMP EMPLOYEE	Temporary appointment	1 Month base salary
TWO SEMESTER FACULTY	9 Month Faculty	
12M DURATION	Staff\ 12 month faculty	12 Month base or annual salary

- Enter the person's base salary in the **Calc Base** field. This is the annual salary as of the date of the last increase.
- Enter the date of the person's last salary increase in the **Eff Date** field. This field defaults to the start date of the proposal, but more precise amounts are obtained when it is accurate.
- **Please contact coeus@uc.edu for detailed instructions on using Anniversary Date for a specific proposal.**
- 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.
    1. With the pointing hand icon selecting a budget person line, click the **Calculate All Base Sal** button

2. Use the horizontal scroll bar at the bottom of the Budget Person window 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.)
3. Adjust the salaries, as needed. (The percentage inflated is centrally maintained for all salaries.)
4. These base salary values may be manually entered, if desired.
5. If NO Base Salaries are entered, the RR Budget form Base Salary field will be $0.00 - the field is not required.



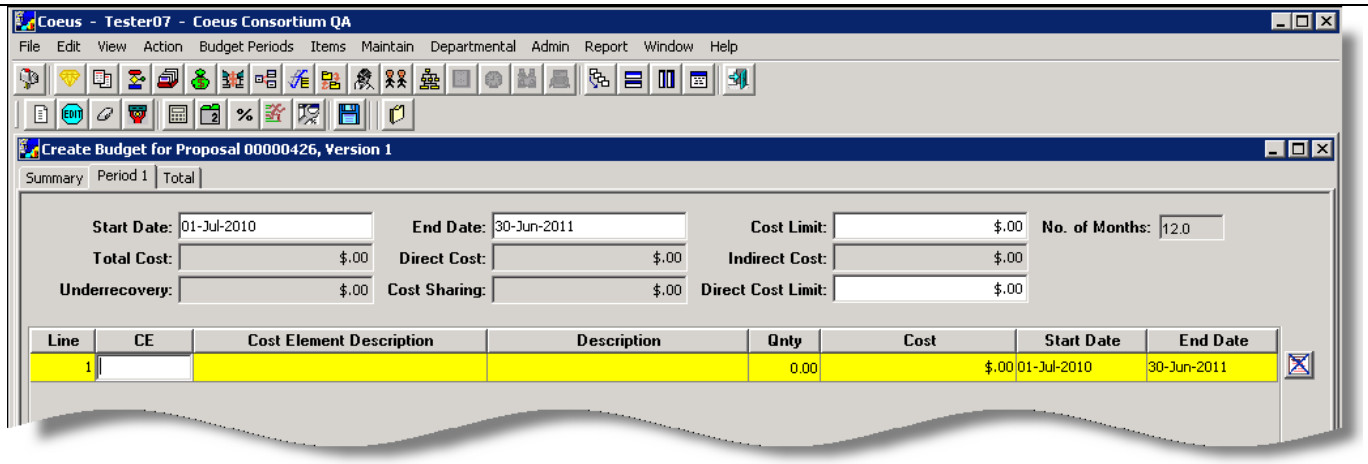


6. Click **OK**. The BUDGET PERSONS window closes.

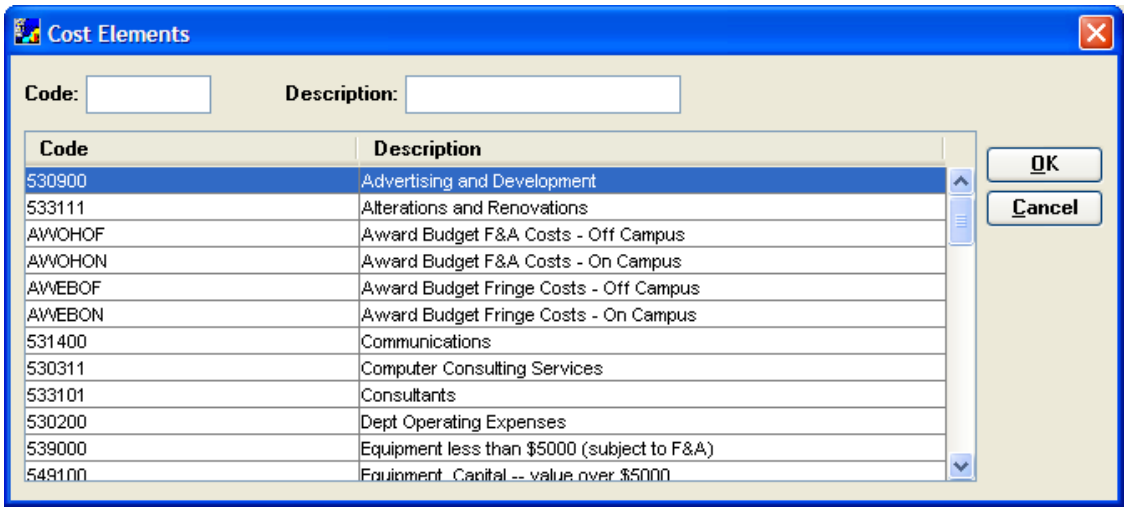
Creating Personnel Line Items and Adding Names

Do this for each personnel line item:

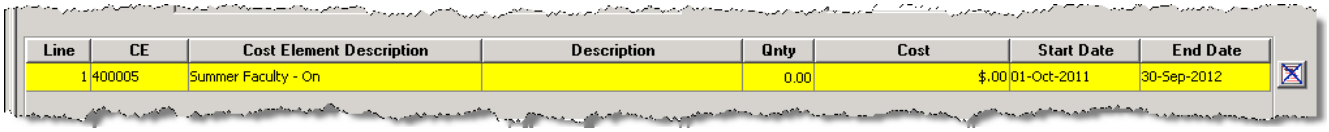
1. From the PERIOD 1 tab of the CREATE BUDGET screen, click the **Add Line Item** icon, select **Items > Add Line Item…**, or press **Ctrl**+A (Mac users press **Command**+A). A blank line item, highlighted in yellow, is added at the end of the list.



2. Double-click the **CE** field. The COST ELEMENTS window opens.

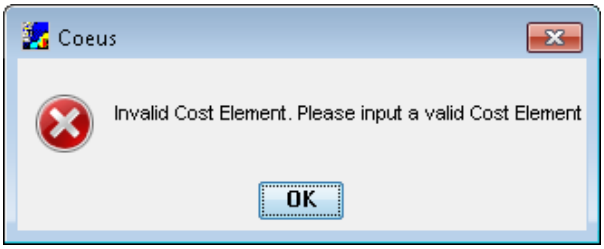


3. Click to select a salary cost element and click **OK**. The COST ELEMENTS window closes and focus returns to the PERIOD 1 tab, and the selected cost element is entered in the line item.



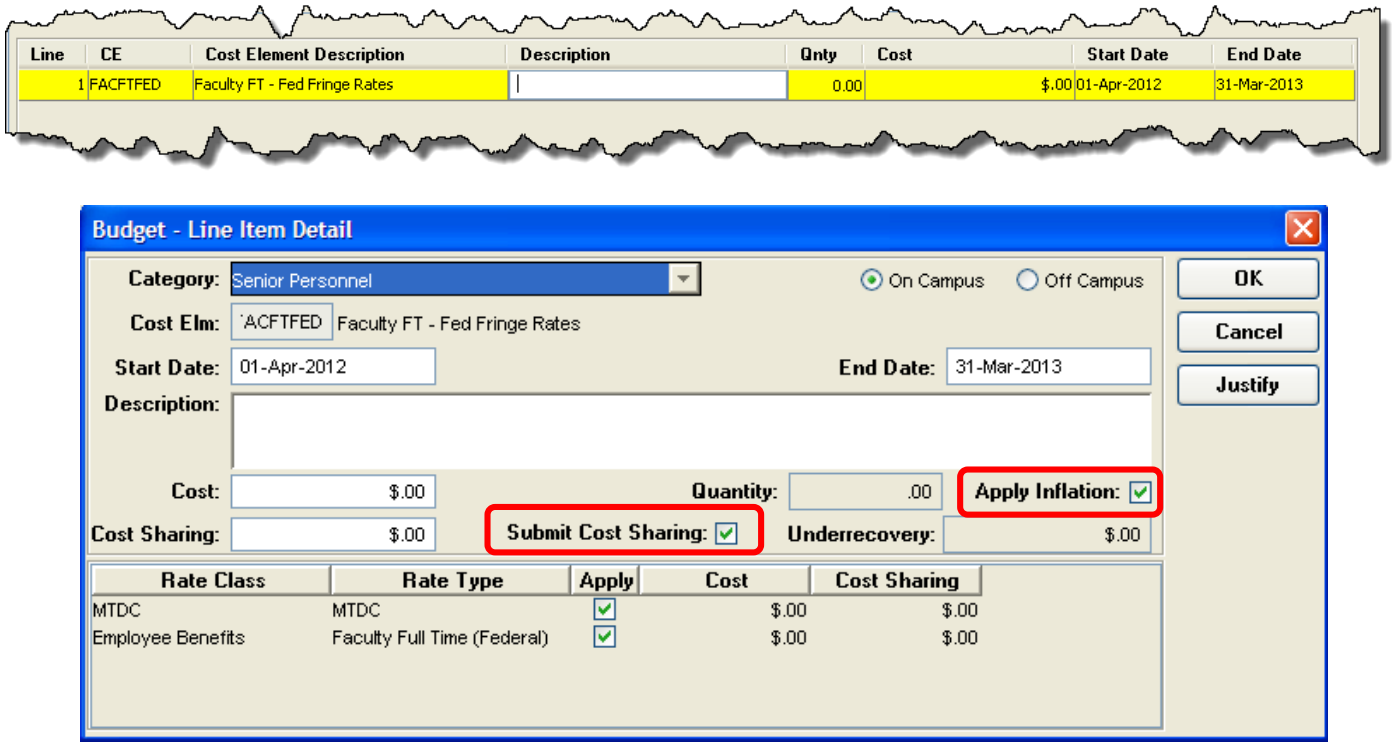
Alternate manual Cost Element entry method:

- Type in a valid & active cost element in the CE field. The value must exactly match a maintained CE.
- See Appendix B: Cost Elements Used in Proposal Development at UC, page 129 for a list of active cost elements.
- If the entered value is either incorrect or marked as inactive, a window alert will appear.

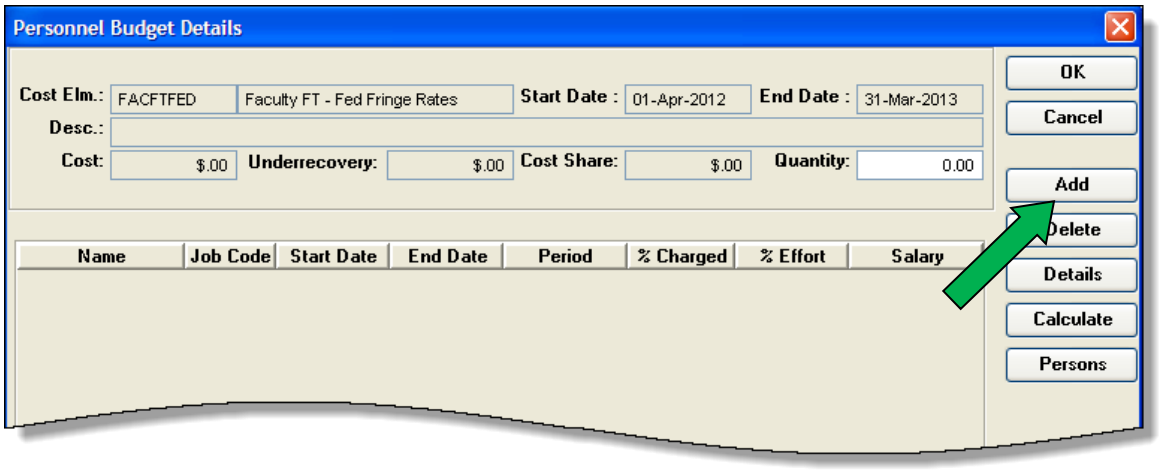


TIP: Review and adjust Line Item Detail default settings if necessary ***before*** you add Personnel Budget Details. Double-click on the line item, or Menu path Item>Edit Detail to edit as needed. The line item detail settings cannot be changed once a Person is applied via the Personnel Budget Details process.

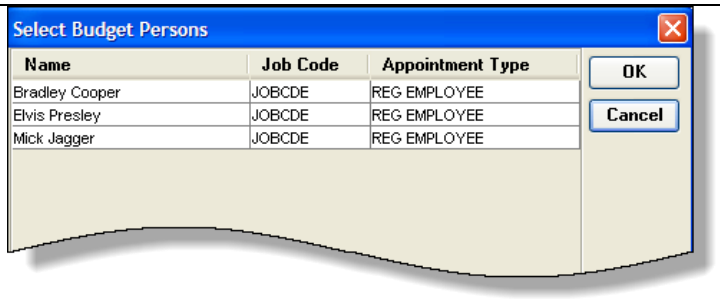
- Change the **Budget Category** – especially necessary for overriding default personnel cost elements to "Senior Personnel" so they appear in the Named Personnel section of sponsor budget forms, including the RR Budget. You may need to do this for Postdoctoral cost element to publish as the PI or Co-I.
- Change **On Campus** to **Off Campus**
- Uncheck **Apply Inflation** so the generated budget periods do not inflate.
- Uncheck **Submit Cost Sharing** so this line item's cost share expense won't submit on Grants.gov forms.
- Uncheck Apply box for overhead rates – which may only be relevant for special submissions



4. With the line item still selected, click the **Personnel Budget for Line Item** icon or select **Items > Personnel Budget…**. The PERSONNEL BUDGET DETAILS window opens.

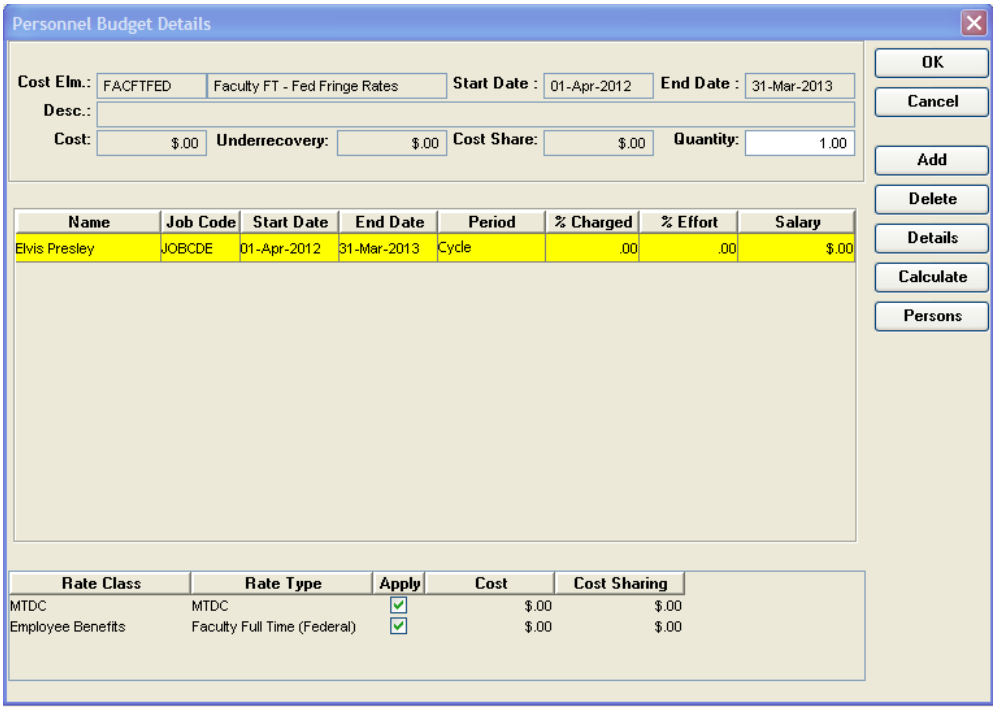


5. Click **Add**. The SELECT BUDGET PERSONS window opens.



6. Select the appropriate person from the list.

7. Click **OK**. The SELECT BUDGET PERSONS window closes, and the person(s) selected appear in lines in the PERSONNEL BUDGET DETAILS window, ready for their effort definition for this budget period.



8. Make entries or adjustments to fields in the PERSONNEL BUDGET DETAILS window:

   a. **Start Date** and **End Date** — Click in the field to change one of these dates to compensate for such occurrences as vacation eligible time or a late start on the project. Change to the appropriate dates for faculty summer period (that is, June, July, or August) if necessary.

   b. **Period** — Select the appropriate appointment type from the drop-down list. The types are:

Appointment Type	Description
Calendar	The 12-month calendar year
Academic	The nine-month academic year
Summer	The three-month summer period

   c. **% Charged** — Click in the field to enter the percentage of the person's salary to be charged to the project. (This field cannot be greater than **% Effort**.) Coeus calculates the salary and stores it in the **Salary** field.

   d. **% Effort** — Click in the field to enter the percentage of the work week this person will charge to the project.

   e. **Calculate**: click the calculate button to display the applicable MTDC and/or Fringe rates in the lower portion of the window.

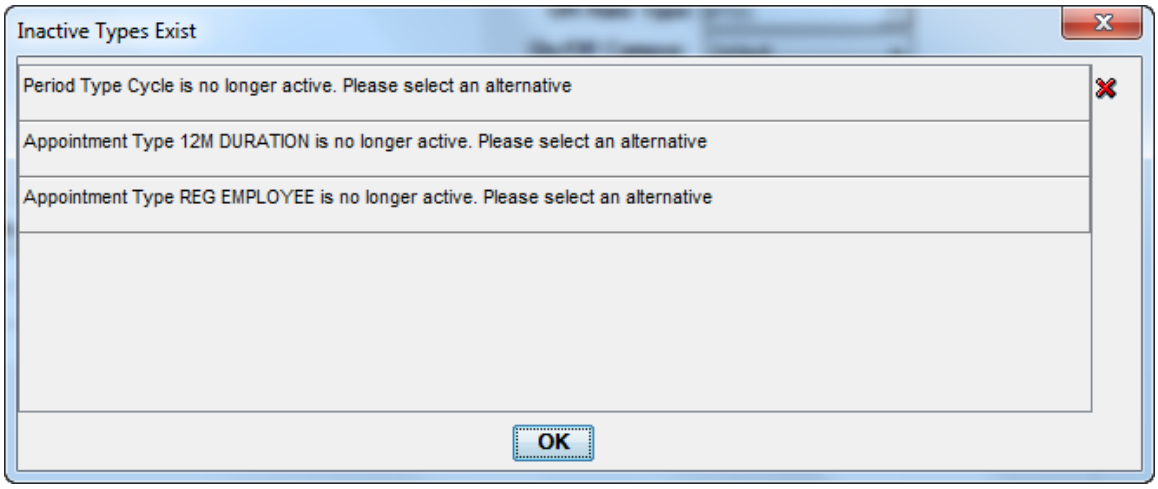
9. Click **OK**. The PERSONNEL BUDGET DETAILS window closes and focus returns to the PERIOD 1 tab.

10. Click the **Save** icon or select **File > Save**.

The 4.5 release supports the maintenance of Appointment & Period Types as inactive. This could occur if you copied a budget from a proposal written with an earlier version of Coeus.

User alerts if an inactive type is in use for any of the budget persons in the proposal.

Example Alert when Saving a Budget with inactive types:

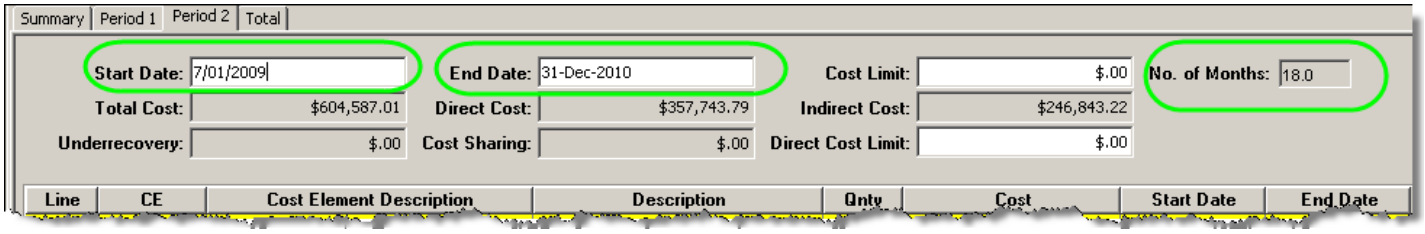


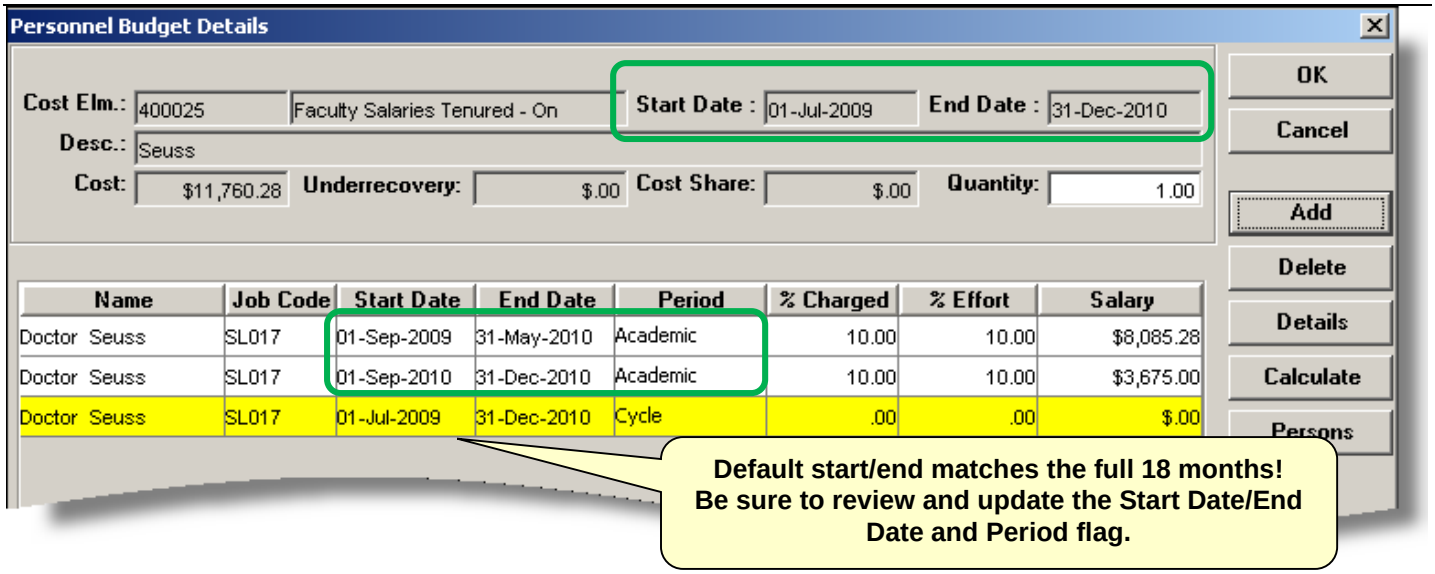
Greater-than or less-than 12 month budget periods

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:

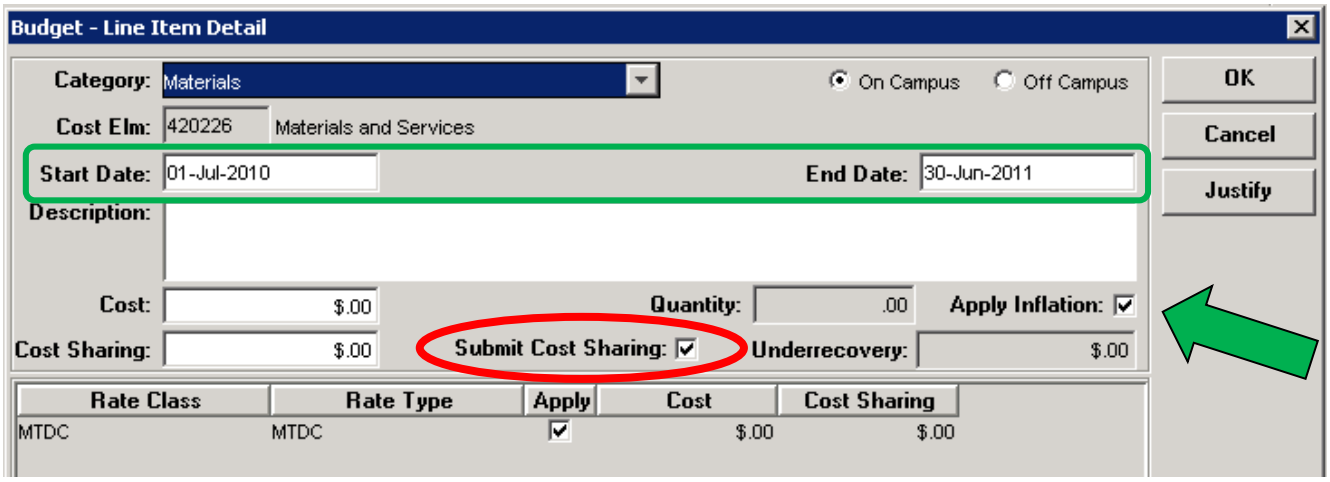
- Use the standard instructions to select cost elements and maintain the budget person details as detailed previously in this guide.
- Be especially mindful to define the **Start Date** and **End Date** for each person as it relates to *this* budget period.
- You may need to Add and define multiple detail lines 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.





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.
  - Change the **Budget Category**– the default category is mapped to printed forms. If a particular expense needs to be recategorized for a special submission, do so here.
  - Change **On Campus** to **Off Campus** if necessary by clicking the radial button. Changing campus status will impact overhead rates applied.
  - Uncheck **Apply Inflation** if necessary *before* generating later periods or using Apply to Later Periods so this line item expense will not inflate.
  - Uncheck **Submit Cost Sharing** so this line item's cost share expense won't submit on Grants.gov forms.
  - Uncheck **Apply** box for overhead rates – which may only be relevant for special submissions.



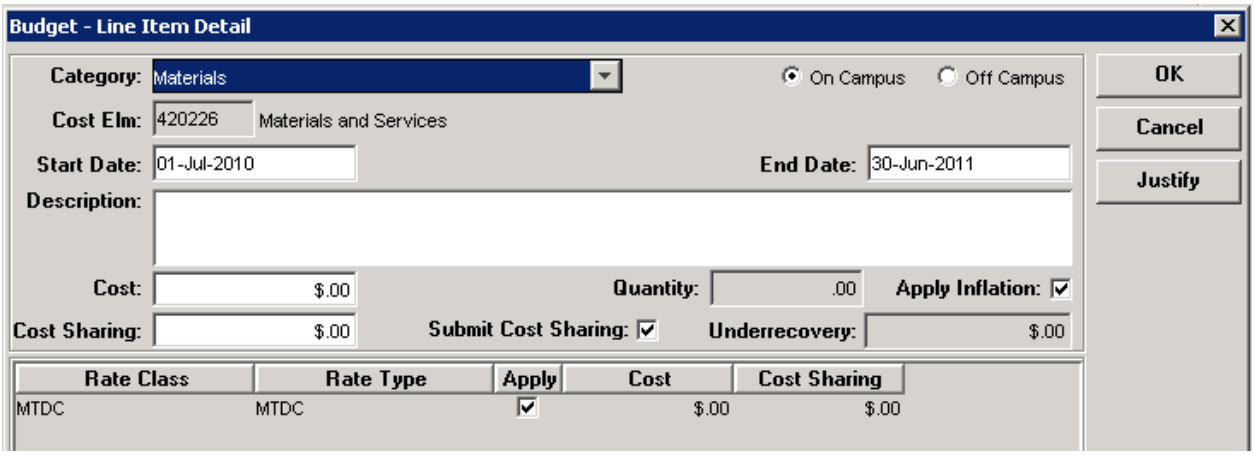
Adding Non-Personnel Line Items

Non-personnel line items are for expenses such as equipment and travel. You enter the costs directly in the line item or the LINE ITEM DETAIL window.

Note: Major equipment (defined as $5,000 or more, durable, and directly related to research) must be budgeted using an individual line item for each piece of equipment. A description is required in the **Description** field, and the expense must be justified. This requirement is for Grants.gov submissions and is good practice for all budgets.

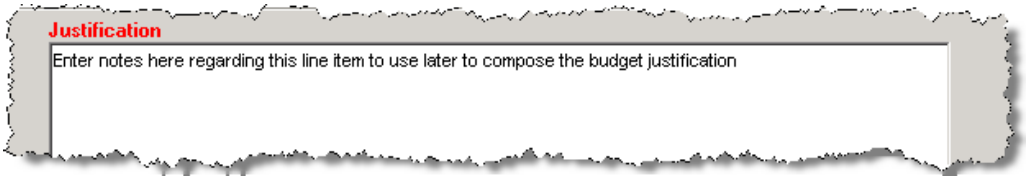
Do this for each non-personnel direct-cost line item:

1. From the PERIOD 1 tab of the CREATE BUDGET screen, click the **Add Line Item** icon, select **Items > Add Line Item…**, or press **Ctrl**+A (Mac users press **Command**+A). A blank line item, highlighted in yellow, is added at the end of the list.
2. To maintain a cost element
   - Type in a valid & active cost element in the **CE** field or
   - Double-click the **CE** field. The COST ELEMENTS window opens.
     1. Select the appropriate cost element and click **OK** or press the **Enter** key.
     2. The COST ELEMENTS window closes and focus returns to the PERIOD 1 tab.
3. Double-click the **Description** field. THE BUDGET – LINE ITEM DETAIL window opens.



4. Make entries in these fields:
   - **Category** — Change the category, if necessary. See Budget Categories, page 73.
   - **Description —** A description of the line item. This is required for equipment, but it can be used for additional information for all non-equipment line items. This field is seen only by Coeus users for line items that are not for equipment.
   - **Cost —** The total cost for the line item. Costs can be entered to the penny. They are rounded to the nearest dollar when printed to most forms, but the value entered is used in calculations.
   - **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.
   - **Apply Inflation** (checkbox) **—** Checked to apply by default on most cost elements to increase costs in later periods. This box can be unchecked so inflation will not be applied to this item when periods are generated.
   - **Cost Sharing —** If applicable, enter the amount to be funded by another source (see Cost Sharing, page 78).
   - **Submit Cost Sharing —** Leave this box checked if the cost share expense should be published on the Grants.gov forms. Uncheck the box if this line item's expense should not be included on the Grants.gov forms.

- **Justification —** Click **Justify** to display this field. Enter notes about the justification for this line item. After you enter a note in this field the icon to the right of the line item changes from to indicating that a justification for the line item has been written.



Note: The **Justification** field is useful for making notes that can become the basis of your Budget Justification narrative. See Creating the Budget Justification Document, page 89, for instructions on consolidating these notes to help you create the narrative.

5. Click **OK**. THE BUDGET – LINE ITEM DETAIL window closes, and focus returns to the PERIOD 1 tab.
6. Click the **Save** icon or select **File > Save**.

Adding Subaward Line Items in the budget

To include subaward expenses in the budget, multiple line items may be required. Per A-21 Cost Principles, most subawards are subject to F&A for only the first $25,000 of the entire award. The remaining amount over $25,000 is not subject to F&A. Cost elements are available to support this entry requirement.

New in 4.5: User may manually add line items as described below or use the new Upload Sub Award > Sub Award Details tool to have the system generate the appropriate line items. You don't need to upload a subaward file to maintain details. See Uploading and Translating Subaward Files

Note: If you are adding subaward line items for an NIH proposal, see Special NIH Subcontract Instructions, page 72.

Do this for each subaward:

1. From the PERIOD 1 tab of the CREATE BUDGET screen, click the **Add Line Item** icon , select **Items > Add Line Item…**, or press **Ctrl**+A (Mac users press **Command**+A). A blank line item, highlighted in yellow, is added at the end of the list.
2. Double-click the **CE** field. The COST ELEMENTS window opens.
3. Select ***532201 Subawards Direct – Subject to F&A*** and click **OK**. The COST ELEMENTS window closes and focus returns to the PERIOD 1 tab.
4. Click the **Description** field and enter the name of the subawardee.
5. Click the **Cost** field and enter the cost of the subaward that is subject to F&A (up to $25,000).
6. If the subaward is for $25,000 or less, go to step *10*. If the subcontract is for more than $25,000, add another line item, (See step *1*.)
7. Double-click the **CE** field and select ***532202 Subawards Direct – No F&A*** and click **OK**. The COST ELEMENTS window closes and focus returns to the PERIOD 1 tab.
8. Click the **Description** field and enter the name of the subawardee.
9. Click the **Cost** field and enter the amount by which the subaward exceeds $25,000.
10. Click the **Save** icon or select **File > Save**.

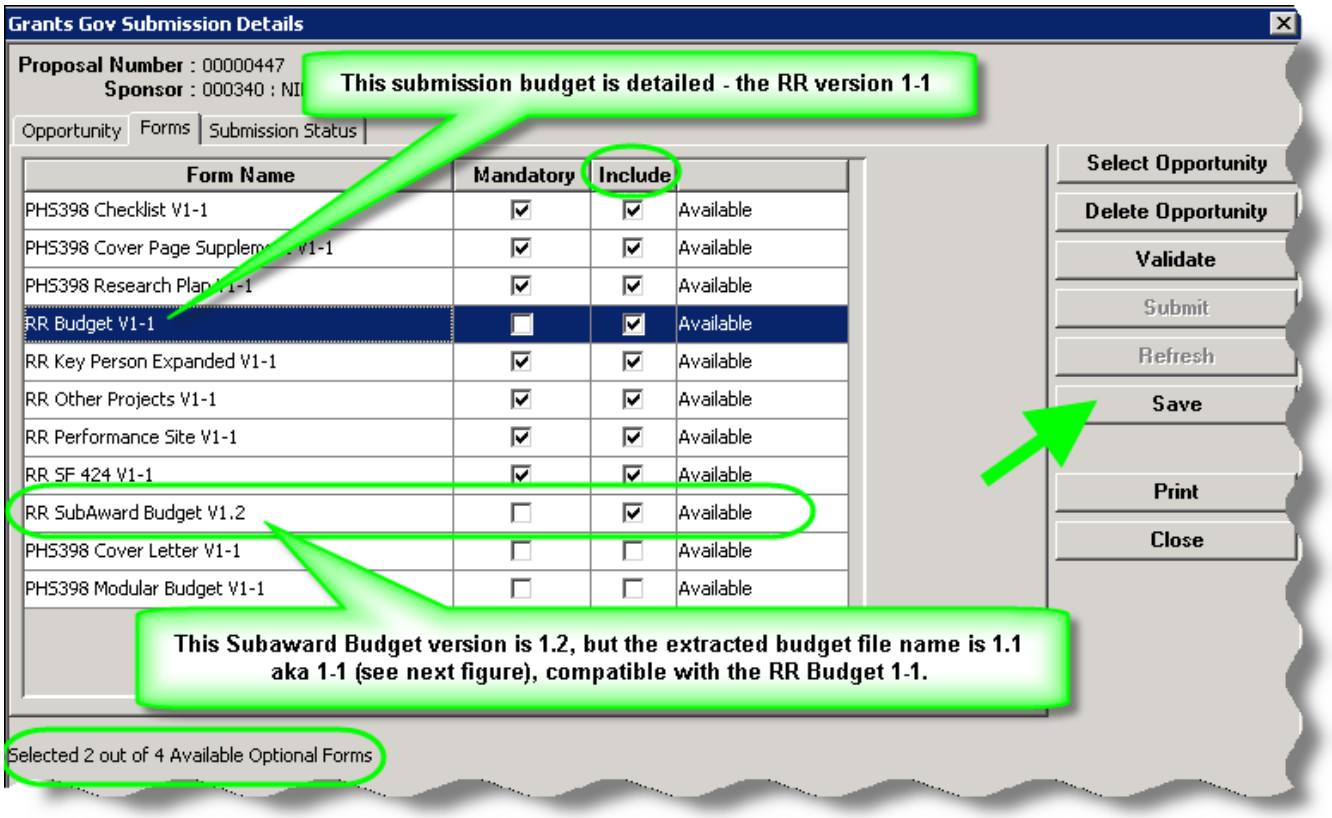
Upload Subaward Budgets Files

When a sponsor requires including a Subaward Budget form in addition to your primary applicant Grants.gov budget form, users should extract an Adobe Subaward Budget from the sponsor's Adobe form package posted at Grants.gov. Locate the opportunity at www.grants.gov, and use one of the search options available under the "Find grant opportunities." Grants.gov and Adobe still recommend to ***only use Adobe Reader***, not *Acrobat*, when working in any of the Grants.gov Adobe forms to avoid potential data corruption.

Subaward Budget Forms

The subaward budget form extracted from the Grants.gov Adobe package is identical in design, detail, and input requirements to the primary applicant budget used for submission (e.g. RR Budget, Fed-Non-Fed Budget, and PHS Training Budget). While the RR Subaward Budget Form name is currently Version 1-2 (as shown in the Grants.gov Forms window figure below) the extracted budget file name includes "1.1" in the title – which is correct when the RR Budget Form (primary applicant budget) is at version 1-1 The "1.2" in the Subaward Budget Form name refers to the version of the *attachment page* where users extract a blank budget file. You can confirm the version number of submission budget by looking at the budget form name and version in the Grants.gov window > Forms tab.

Figure 1: Grants.gov > Forms window after selecting to "Include" two of the four Optional forms; RR Budget and RR Subaward Budget



Include the Subaward Budget Form in your Coeus submission

1. Select the Subaward form in the Grants.gov Submission window:
    a. From the PROPOSAL DETAILS screen select **Action > Grants.gov**. The GRANTS GOV SUBMISSION DETAILS window opens.
    b. Open the FORMS tab and select to "Include" the "Subaward Budget."
    c. Click the **Save** button to add this optional form to be included with this submission. (Once saved, the form will be moved from the bottom of the list to in alphabetic order by the "Include" list and be included in the "Selected out of Optional" count at the bottom of the window.
    d. Close the GRANTS GOV SUBMISSION DETAILS window.
2. Locate the opportunity at Grants.gov.
3. Extract the Subaward form and save the file.

Figure 2: Adobe Form Package after selecting the R&R Subaward Budget Attachment Form and "moved" for Submission

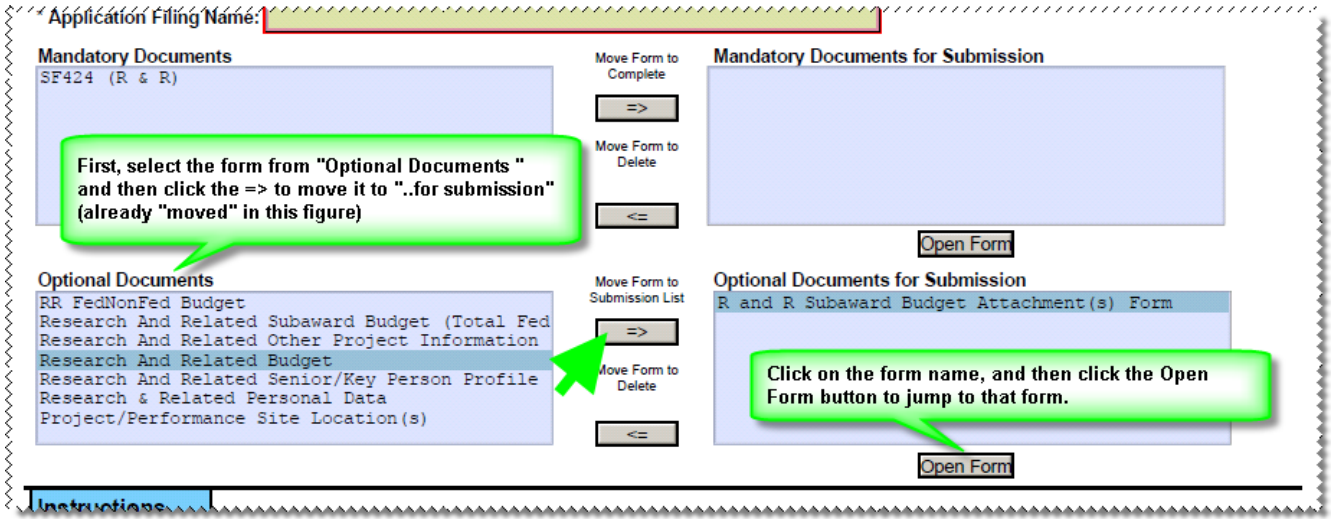
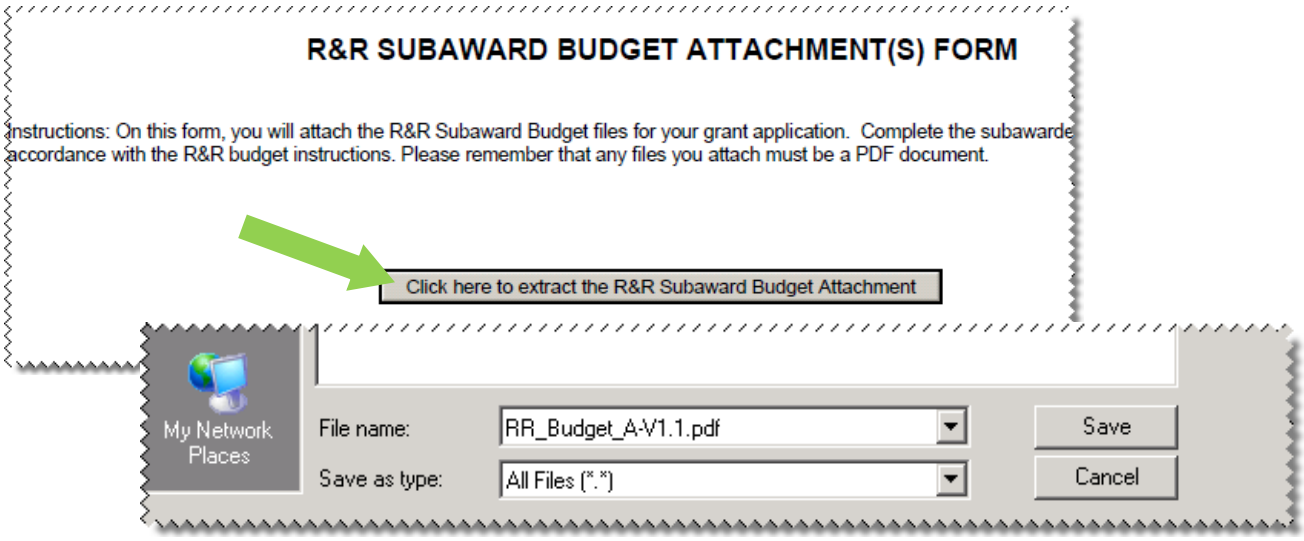
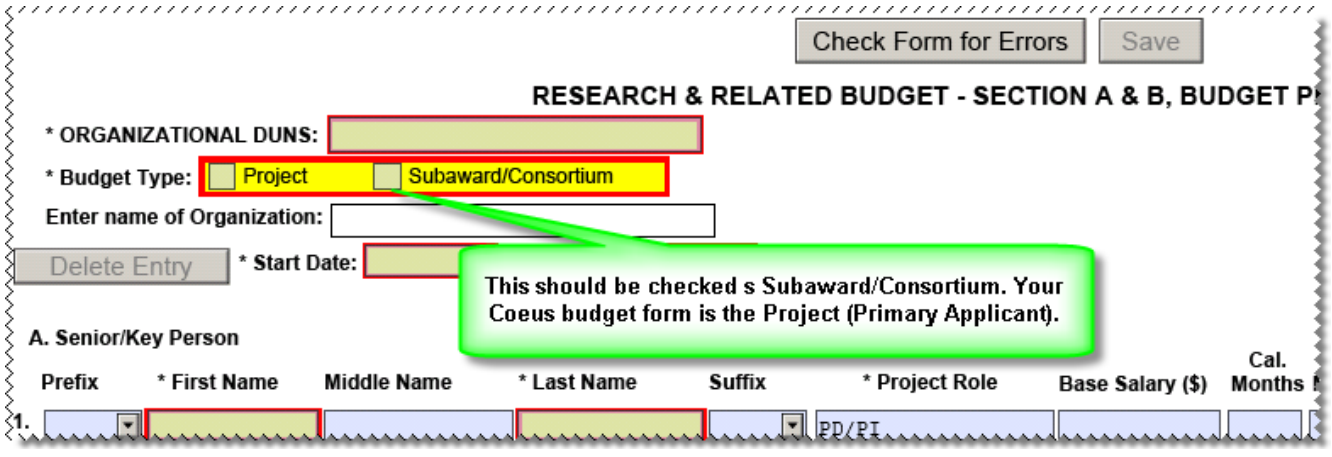


Figure 3: R&R Subaward Budget Attachment form: Click to extract the RR Budget –automatically the File Name field is prepared with the name "RR_Budget_A-V.1.pdf" – you can alter this name prior to saving (just don't delete the ".pdf" file extension).



4. The extracted budget file necessary, marked as "Subaward/Consortium" for your subawardee, must be manually completed following all the same sponsor rules and requirements as the primary applicant budget. Please reference your sponsor's submission guidelines for specific details. Once the form is completed, the file can be uploaded in the Coeus Premium Budget. See next section.



Uploading and Translating Subaward Files

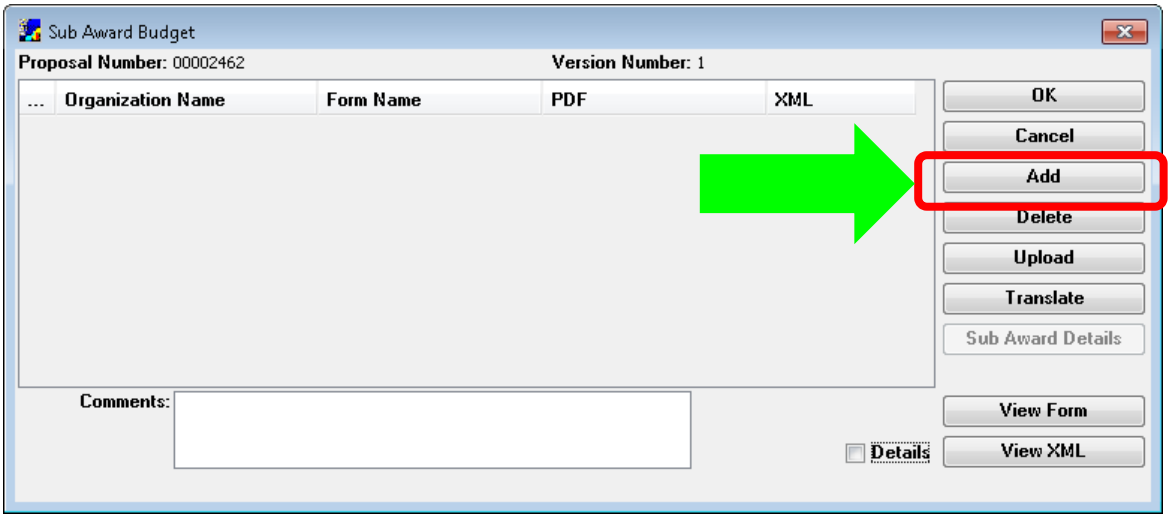
New in 4.5, a user-friendly process that reads the uploaded Adobe subaward form and inserts system-generated line items for subaward funding values for each project period into the proposal budget. Users may utilize the new Subaward Details window to manually type in the direct, indirect costs, and cost 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!

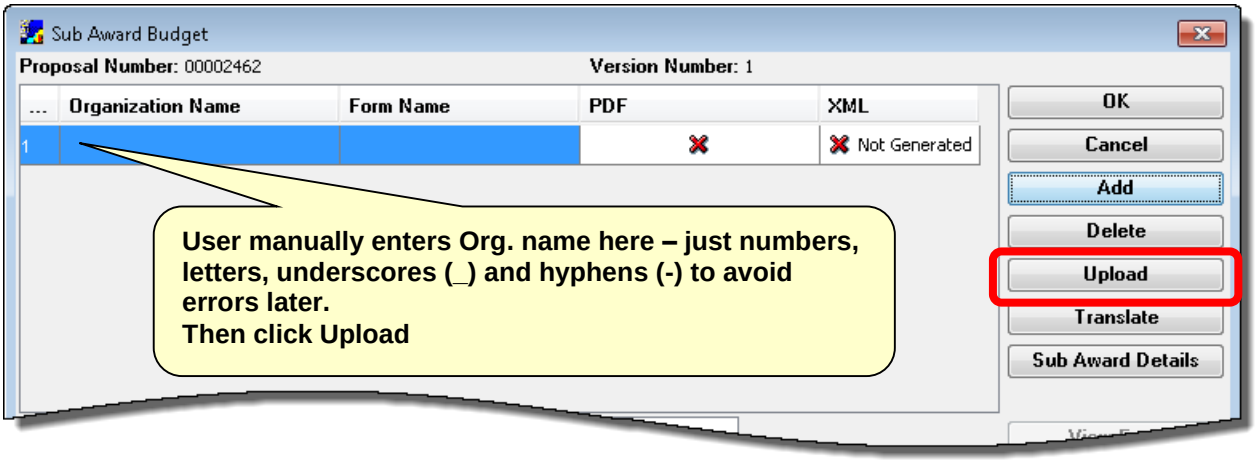
The proposal budget must be generated in order for the Sub Award Detail window to know how many budget periods to supply.

Do this for every detailed subaward budget required for your proposal:

1. Complete your detailed budget line item entries and generate all budget periods. (see Generate All Periods)
2. From the MODIFY BUDGET FOR PROPOSAL screen select **Edit > Sub Award**. The SUB AWARD BUDGET window opens.



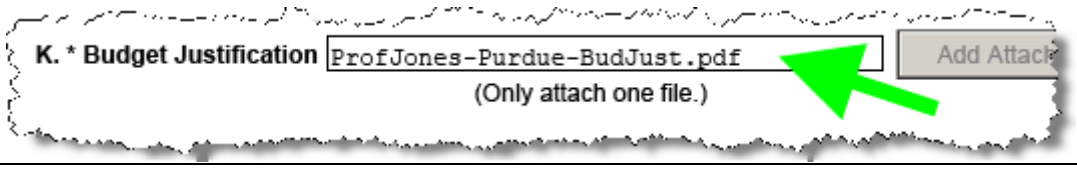
3. Click **Add** to generate a line to enter the **Organization Name** (unique name, no spaces or special characters)



4. **Click Upload**; locate a completed Adobe Subaward form.

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!



5. **Click Translate** to convert the file to XML, the transmission format for s2s submission. (Note: Save and Translate will be performed automatically upon closing this window.)

   The Adobe file will be translated to XML for submission with your Coeus application. Note the **Form Name**, **Status** and **Attachments** fields have information about the translated file.

   a. **Form Name** is the budget form style (e.g. RR Budget, Fed-Non-Fed, PHS Training)

   b. **Attachments** is the Coeus ID for this upload,

   c. **PDF File** is the file name of the uploaded subaward budget PDF file.

   d. **Status** indicates if the file was successfully translated or if there were errors.

      i. Errors indicate that your PDF file may have become corrupted.

      ii. The status *must* state that XML generated successfully to submit properly via Grants.gov.

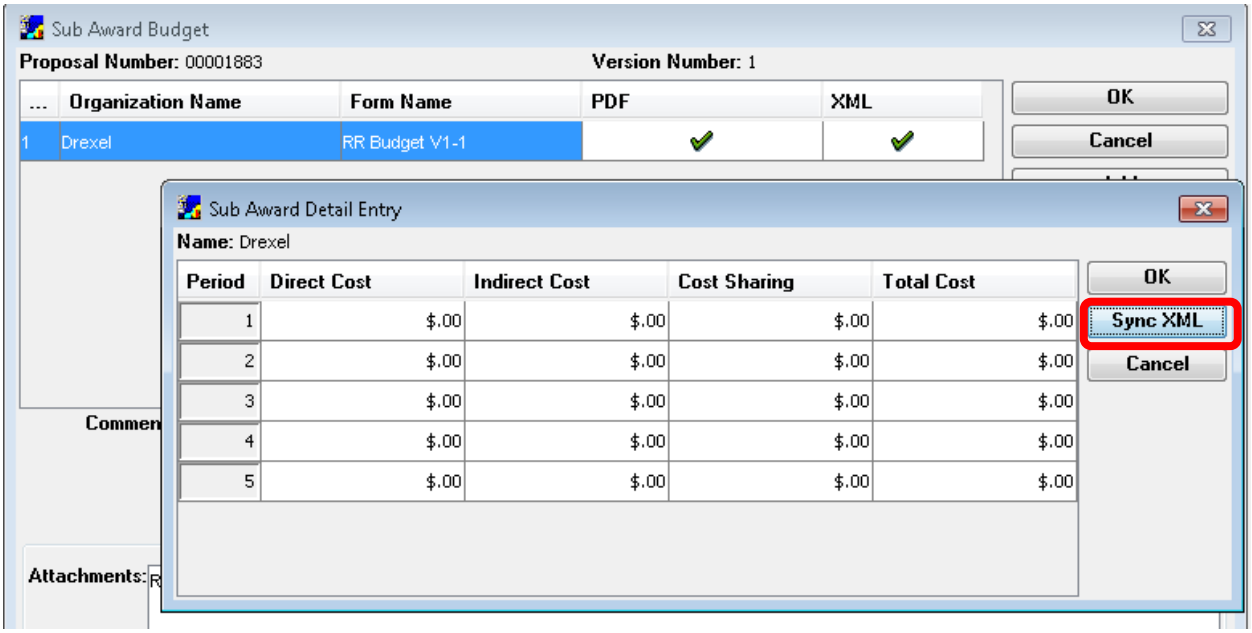
      iii. Refer to the instructions (ahead) to replace the subaward file for this Organization line.

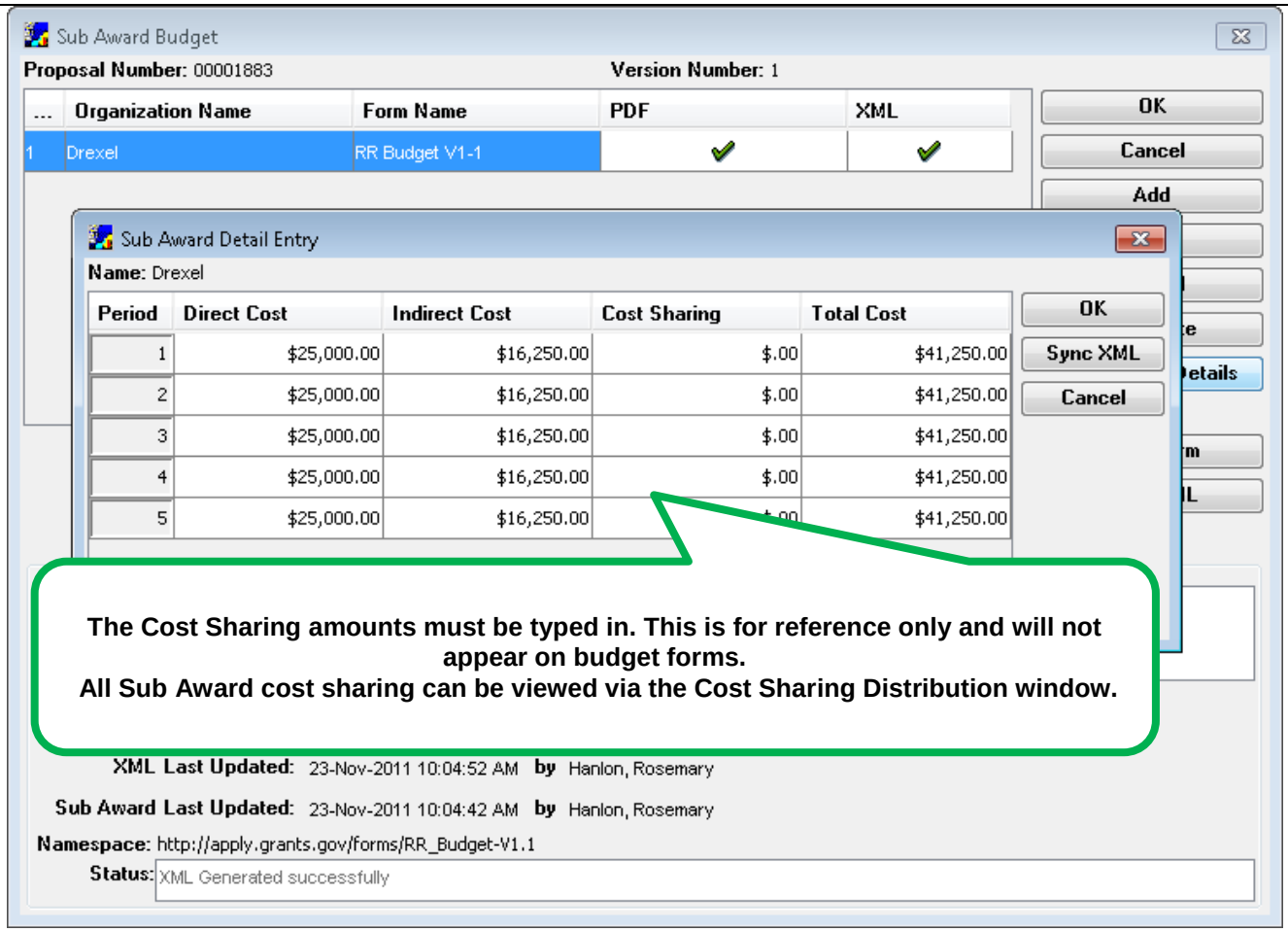
6. **Sub Award Details button:**

- With an **Organization** highlighted, click the **Sub Award Details button** to open the SUB AWARD DETAIL ENTRY window.
  - If an Adobe subaward budget form has been uploaded and translated, click the **Sync XML** button to have the system extract the details from the budget file.

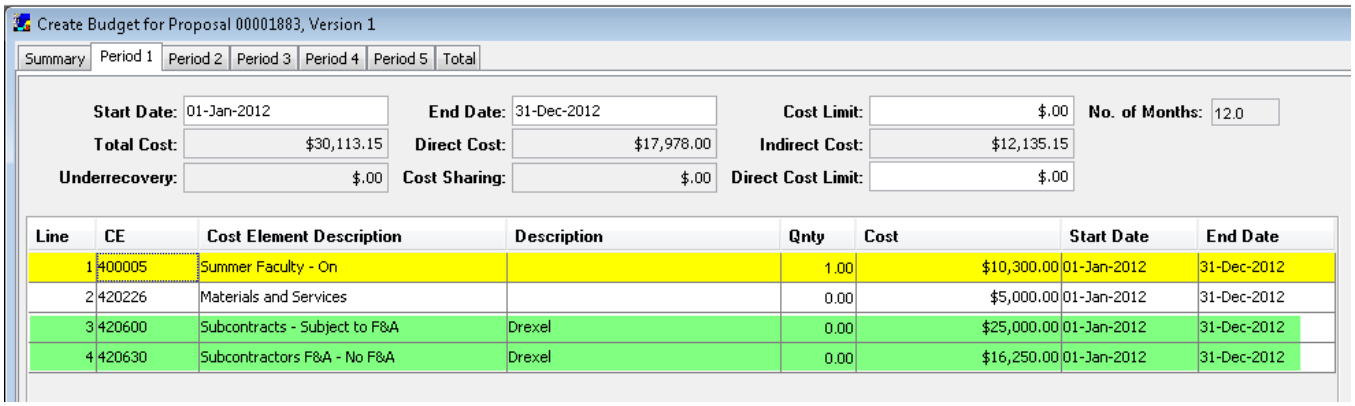
NOTE: the Start/End dates of the subaward file must be compatible with the prime budget to Sync

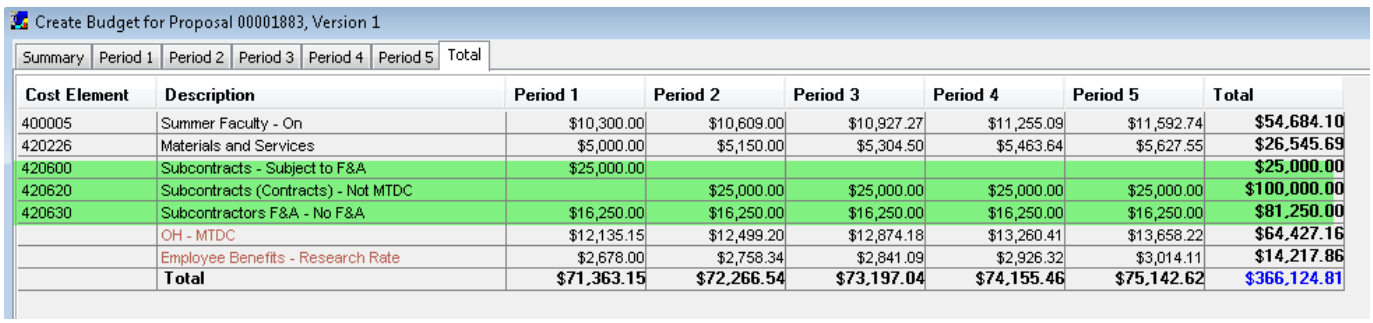
  - If there is no subaward file upload, manually enter the values.
  - **Cost Sharing** column is **user entered** – there are no values in the uploaded subaward budget to sync. Costsharing referenced here is for internal reference and will not populate on forms.



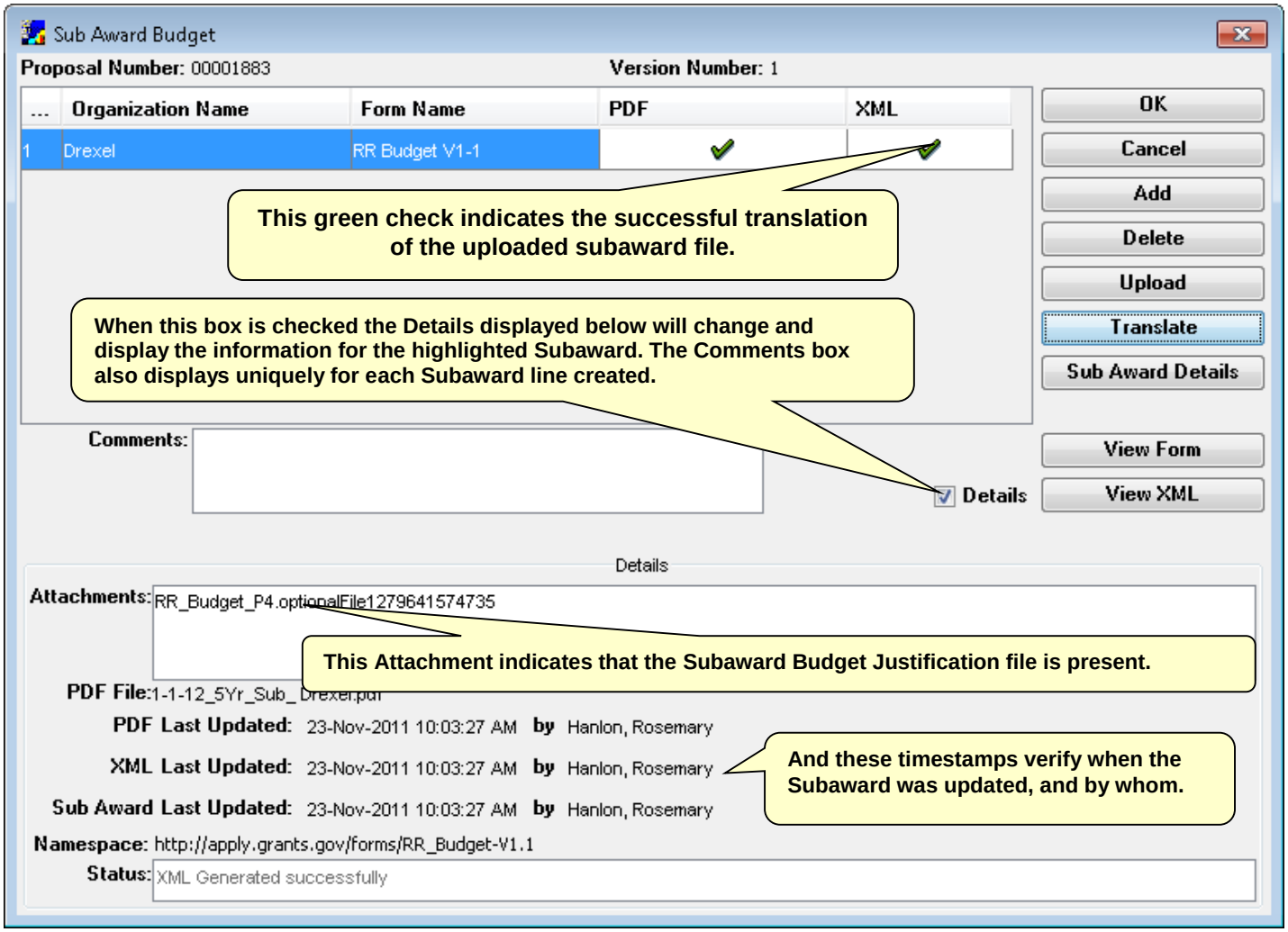


7. **Click OK** to close the SUB AWARD BUDGET window. The system will automatically populate the detailed budget with the line items for the subaward, parsing the first $25K subject to F&A in the appropriate budget periods.





8. **Repeat** the upload steps if there are more Subawards to transmit with your submission.
9. **Options available in the SUB AWARD BUDGET window:**
    a. **Sub Award Details**: opens the details window for review or manual entry
    b. **Upload** again to replace the file for the selected Organization
    c. **View Form** to view the Adobe Subaward Budget form.
    d. **View XML** to view the translated file
    e. **Add a Comment** to make a note about this subaward
    f. **Uncheck/Check Details** to collapse/view the information about the uploaded and translated file.

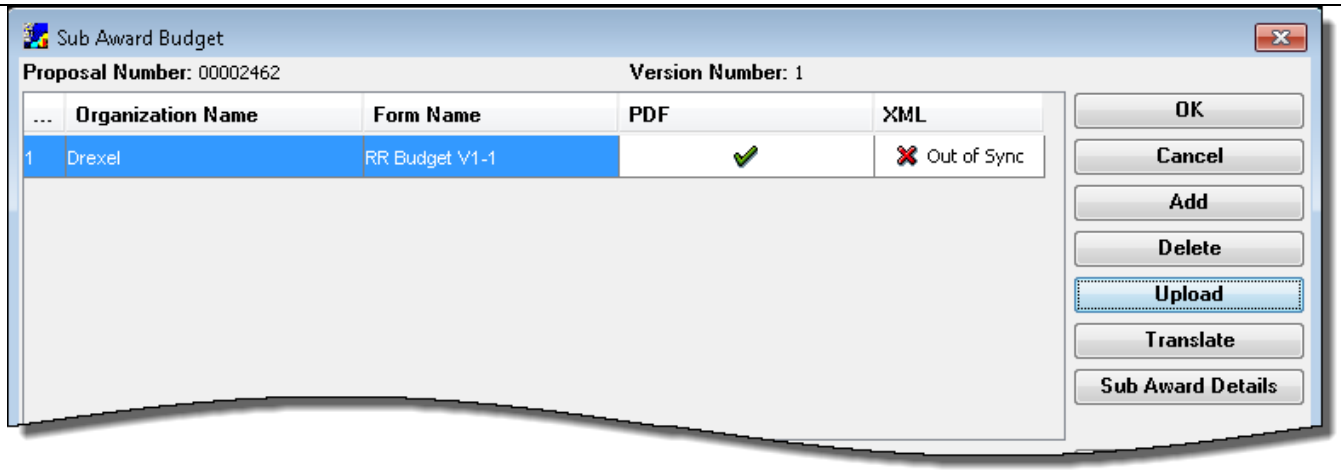


Using the Subaward Comment box

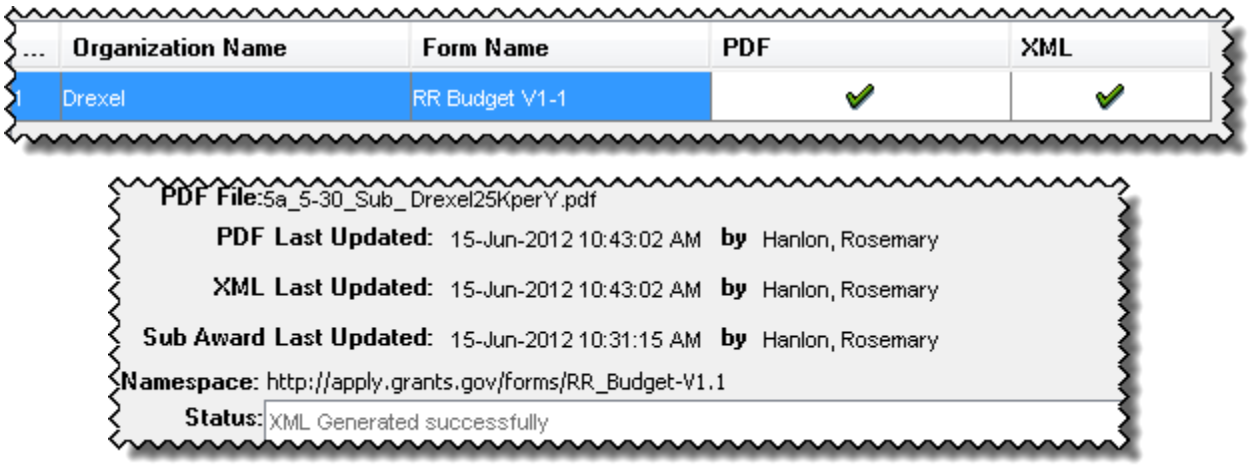
- Use the Comments box to insert notes about the uploaded files.
- Deselect the **Details** check box to minimize the translation details pane in the SUB AWARD BUDGET window.

Replacing an Uploaded Subaward File

1. From MODIFY BUDGET FOR PROPOSAL select **Edit > Sub Award**. The SUB AWARD BUDGET window opens.
2. Select the line for the subawardee whose Adobe budget file you are going to replace.
3. Click **Upload**. A file browser window opens.
4. Find the Adobe budget file, select it, and click **Open**. The file browser closes and focus returns to the SUB AWARD BUDGET window. The replaced file's **XML** status is now Out of Sync, indicated by the red X in that column.



5. Click **Translate**. The Adobe file is translated to XML. The XML column will display the green check to indicate it is in sync; the **last updated** time stamps will change to indicate the transaction time and the name of the user that generated this XML successfully.



Viewing the uploaded Subaward Form from Coeus

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

Once translated, you can view the .XML file in a 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. As with all uploaded files in Coeus, the document is presented in a separate browser window as a PDF file. While this subaward document may appear to be a fully functioning PDF fill-able form, any changes you make will NOT be saved to your file already in Coeus! ***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.***

Special NIH Subcontract Instructions

Select the correct cost elements for subaward F&A expenses to enable the Coeus modular budget sync feature to work effectively for NIH modular budget submissions. Isolating the subaward indirect expense entries by selecting the subawardee's F&A types in your budget gives Coeus the data needed to sync to the NIH modular budget screen and submission forms. The four direct cost types are listed here, and two examples follow.

Code	Description	Cost Type
532201	Subawards Direct – Subject to F&A (first $25,000)	Direct
532202	Subawards Direct – Not Subject to F&A	Direct
SUBFAGT	Subawards F&A – no F&A	Indirect
SUBFALT	Subawards F&A – Subject to F&A	Indirect

Example 1

The subaward is $75,000 annual direct costs plus 65% F&A, or $48,750, for a total of $123,750.

This is the common situation in which the first period costs of the subcontract exceed $25,000. Three line items are needed in the first period, and two in the following periods.

Period 1:

532201	Subawards Direct -- subject to F&A	First 25K of subawardee direct costs	0.00	$25,000.00
532202	Subawards Direct-- not subject to F&A	Remainder of direct costs	0.00	$50,000.00
SUBFAGT	Subawards F&A - No F&A	Subawardee F&A costs	0.00	$48,750.00

Period 2:

532202	Subawards Direct-- not subject to F&A	Period 2 subawardee direct costs	0.00	$75,000.00
SUBFAGT	Subawards F&A - No F&A	Subawardee F&A costs	0.00	$48,750.00

Period 3:

532202	Subawards Direct-- not subject to F&A	Period 3 subawardee direct costs	0.00	$75,000.00
SUBFAGT	Subawards F&A - No F&A	Subawardee F&A costs	0.00	$48,750.00

Example 2

The subaward is $12,000 annual direct costs plus 65% F&A, or $7,800, for a total of $19,800.

In this example the subaward total is less than $25,000. All costs incur Institute F&A. This is an uncommon situation in which two line items are needed in the first period and three in the second.

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

Period 1:

532201	Subawards Direct -- subject to F&A	Less than 25K Period 1	0.00	$12,000.00
SUBFALT	Subawards F&A - Subject to F&A	For syncing modular budget	0.00	$7,800.00

Period 2:

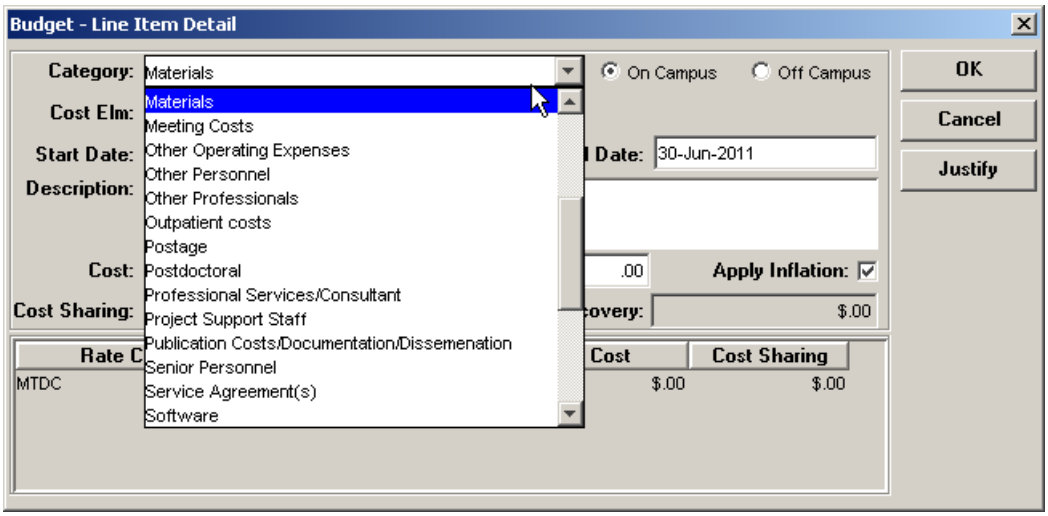
532201	Subawards Direct -- subject to F&A	Total still less than 25K	0.00	$5,200.00
532202	Subawards Direct-- not subject to F&A	Subawardee direct costs >25K	0.00	$6,800.00
SUBFAGT	Subawards F&A - No F&A	For syncing modular budget	0.00	$7,800.00

Budget Categories

A subset of the available cost elements (GLs) is used for proposal submission. As a result, many of the GLs you are accustomed to seeing in UC Flex are unavailable. Coeus groups the GLs into budget categories to support printing of sponsor forms. These categories are dependent on the individual sponsor's needs. Each available cost element has been assigned to a budget category based on UC use and sponsor definition. You can reset the budget category when needed to support unique budget submission requirements. Please see Appendix B: Cost Elements Used in Proposal Development at UC, page 132

Viewing and Changing a Line Item Budget Category

1. Select the line item. When selected the line item is highlighted.
2. Select **Items > Edit Details…** or double-click the line item. The BUDGET – LINE ITEM DETAIL window opens.



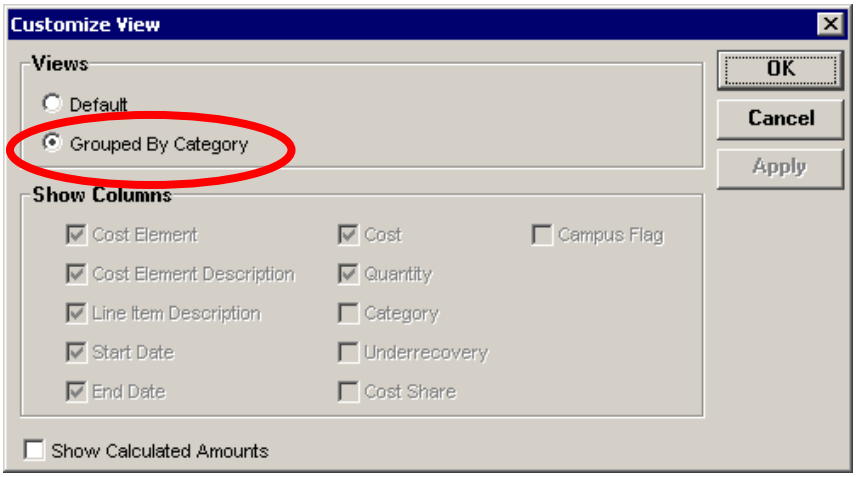
3. To change the category, click the **Category** drop-down list and make a selection.

Note: You cannot change a budget category if the line item has person details entered. To make that change, remove the person details, and then change the budget category, and re-enter the person details.

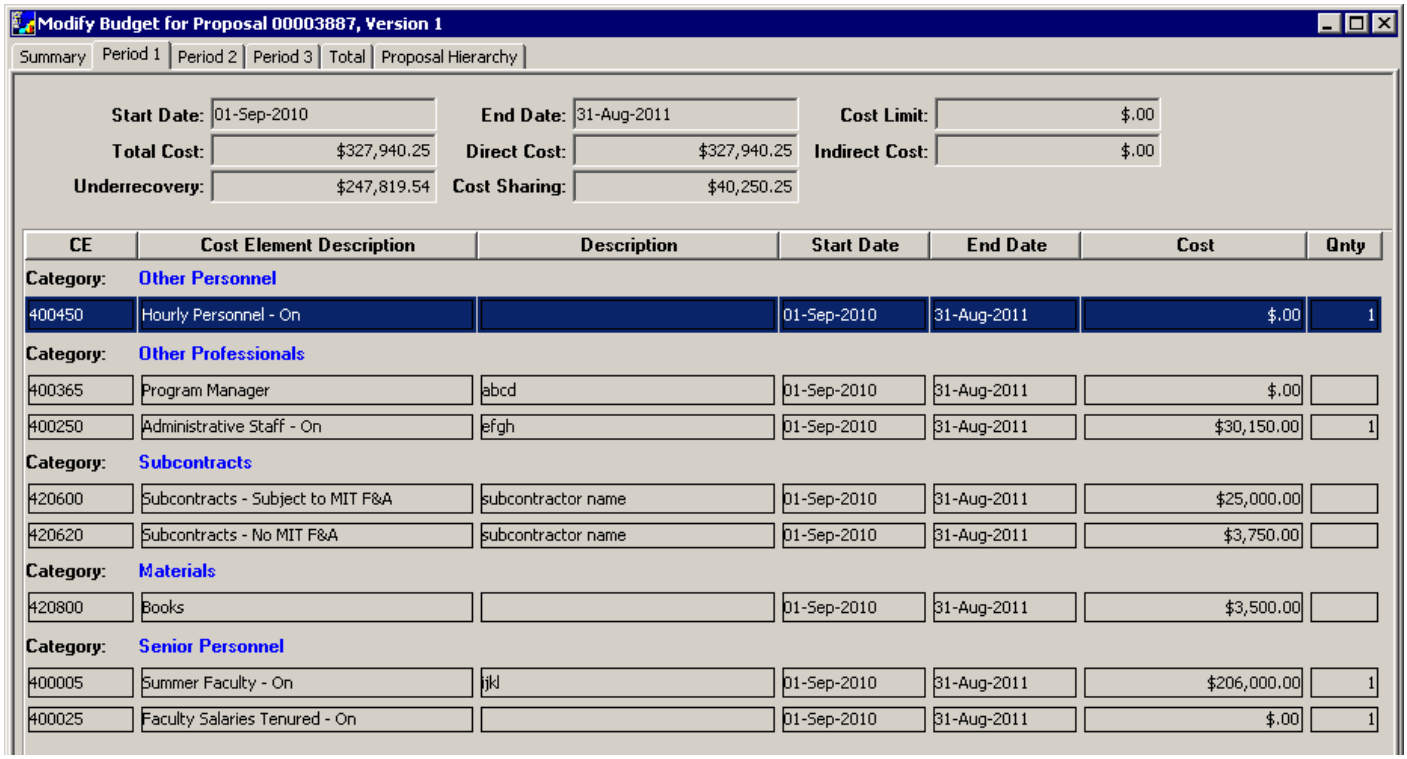
Viewing All Period Budget Categories

First Method

1. Select the tab for the budget period you want to view.
2. Select **View > Customize**. The CUSTOMIZE VIEW window opens.



3. Select the **Grouped By Category** option button (circled above). Click **OK**.
4. The view in the period tab changes to look similar to this.

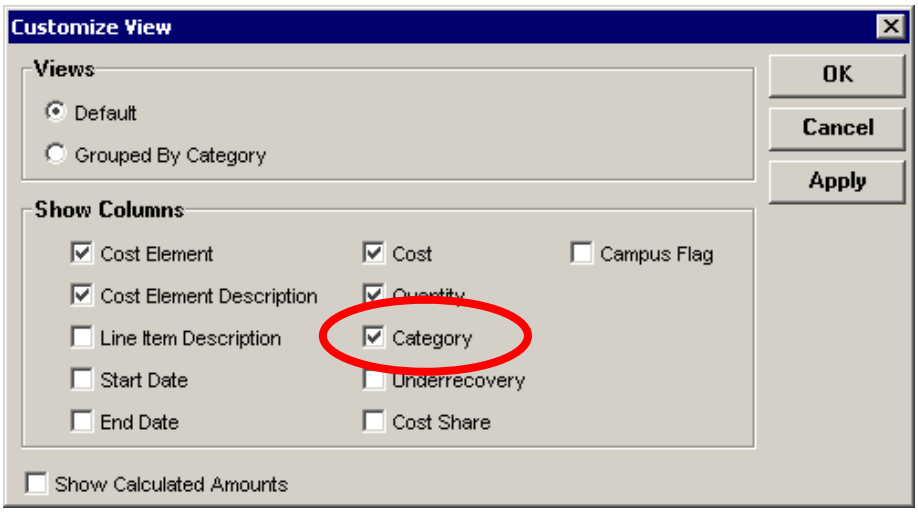


CE	Cost Element Description	Description	Start Date	End Date	Cost	Qnty
Category:	Other Personnel					
400450	Hourly Personnel - On		01-Sep-2010	31-Aug-2011	$.00	1
Category:	Other Professionals					
400365	Program Manager	abcd	01-Sep-2010	31-Aug-2011	$.00	
400250	Administrative Staff - On	efgh	01-Sep-2010	31-Aug-2011	$30,150.00	1
Category:	Subcontracts					
420600	Subcontracts - Subject to MIT F&A	subcontractor name	01-Sep-2010	31-Aug-2011	$25,000.00	
420620	Subcontracts - No MIT F&A	subcontractor name	01-Sep-2010	31-Aug-2011	$3,750.00	
Category:	Materials					
420800	Books		01-Sep-2010	31-Aug-2011	$3,500.00	
Category:	Senior Personnel					
400005	Summer Faculty - On	ijkl	01-Sep-2010	31-Aug-2011	$206,000.00	1
400025	Faculty Salaries Tenured - On		01-Sep-2010	31-Aug-2011	$.00	1

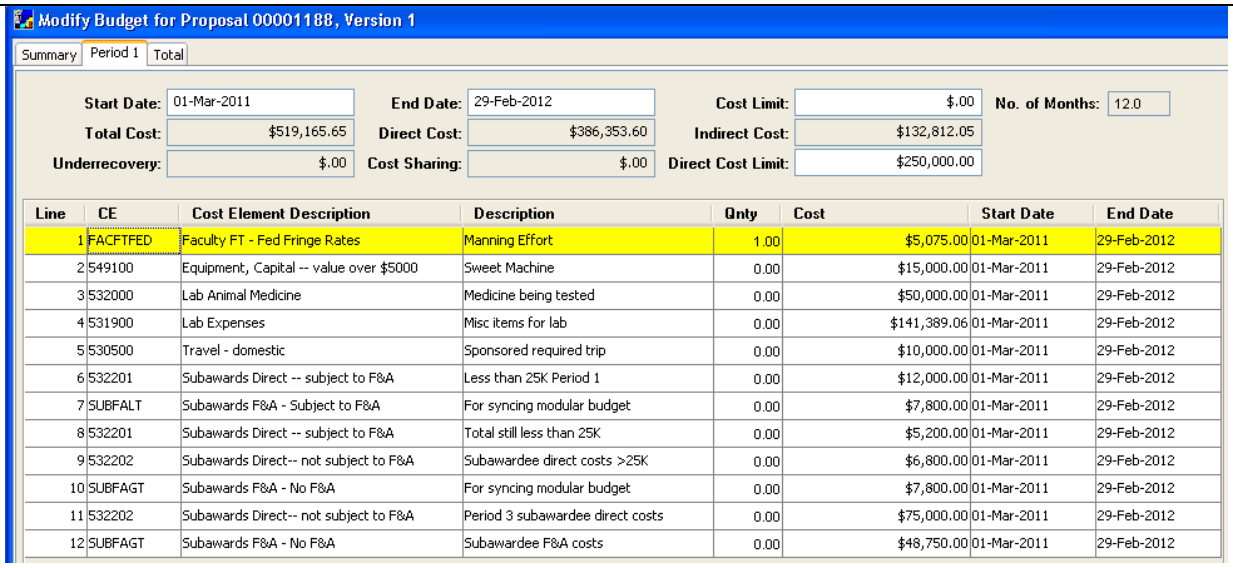
Line items are grouped by the category to which they will print on the budget forms. You cannot modify line items in this view. (To modify line items, return to the default view. See *Returning to the Default View*, page *72*.)

Second Method

1. Select the tab for the budget period you want to view.
2. Select **View > Customize**. The CUSTOMIZE VIEW window opens.



3. Select the **Category** checkbox (circled above). Uncheck any unneeded columns (optional). Click **OK**.
4. The view in the period tab looks similar to this.



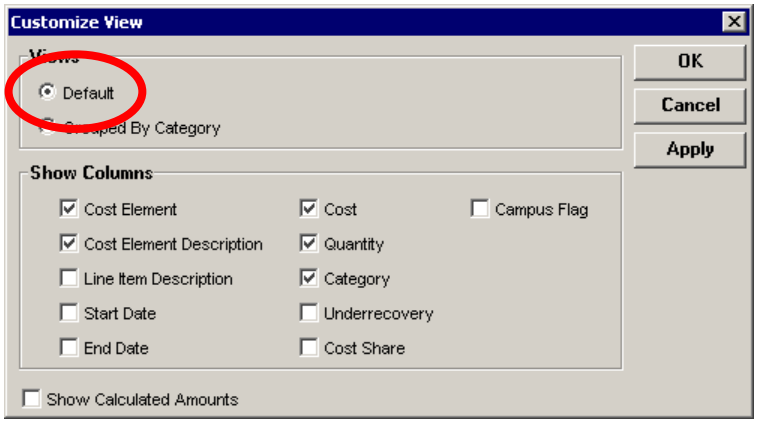
Line	CE	Cost Element Description	Description	Qnty	Cost	Start Date	End Date
1	FACFTFED	Faculty FT - Fed Fringe Rates	Manning Effort	1.00	$5,075.00	01-Mar-2011	29-Feb-2012
2	549100	Equipment, Capital -- value over $5000	Sweet Machine	0.00	$15,000.00	01-Mar-2011	29-Feb-2012
3	532000	Lab Animal Medicine	Medicine being tested	0.00	$50,000.00	01-Mar-2011	29-Feb-2012
4	531900	Lab Expenses	Misc items for lab	0.00	$141,389.06	01-Mar-2011	29-Feb-2012
5	530500	Travel - domestic	Sponsored required trip	0.00	$10,000.00	01-Mar-2011	29-Feb-2012
6	532201	Subawards Direct -- subject to F&A	Less than 25K Period 1	0.00	$12,000.00	01-Mar-2011	29-Feb-2012
7	SUBFALT	Subawards F&A - Subject to F&A	For syncing modular budget	0.00	$7,800.00	01-Mar-2011	29-Feb-2012
8	532201	Subawards Direct -- subject to F&A	Total still less than 25K	0.00	$5,200.00	01-Mar-2011	29-Feb-2012
9	532202	Subawards Direct-- not subject to F&A	Subawardee direct costs >25K	0.00	$6,800.00	01-Mar-2011	29-Feb-2012
10	SUBFAGT	Subawards F&A - No F&A	For syncing modular budget	0.00	$7,800.00	01-Mar-2011	29-Feb-2012
11	532202	Subawards Direct-- not subject to F&A	Period 3 subawardee direct costs	0.00	$75,000.00	01-Mar-2011	29-Feb-2012
12	SUBFAGT	Subawards F&A - No F&A	Subawardee F&A costs	0.00	$48,750.00	01-Mar-2011	29-Feb-2012

Each line item displays the name of the category to which it will print on the budget forms.

Note: You might need to scroll to the right to see all columns.

Returning to the Default View

1. Select the tab for the budget period you want to return to the default view.
2. Select **View > Customize**. The CUSTOMIZE VIEW window opens.



3. Select the **Default** option button (circled above), and click **OK**.

Generating the Remaining Budget Periods

You create the remaining budget periods from the Period 1 budget. This can be done only once, but you can make changes to individual line items and apply those changes to later periods.

1. Check that all budget items that will be needed in future periods are in the Period 1 budget.
2. Click the **Generate All Periods** icon or select **Budget Periods > Generate All Periods**. A tab is created in the MODIFY BUDGET FOR PROPOSAL screen for each period generated. Each tab displays the same line items as PERIOD 1, but with costs inflated by the rate specified. The TOTAL tab displays totals for the project.
3. Click the **Save** icon or select **File > Save**. If you have set cost limits and any are exceeded, warnings indicate which periods exceed the limit. Click OK and make any necessary adjustments, as explained in the next section.

Making Adjustments

You can make several adjustments to the budget, as explained in the following sections.

Deleting a Personnel Line Item

Use this procedure to delete a line item that has person details.

1. Open the tab for the budget period from which you want to delete the line item.
2. Select the line item. When selected, it is highlighted in yellow.
3. Click the **Personnel Budget for Line Item** icon or select **Items > Personnel Budget…**. The PERSONNEL BUDGET DETAILS window opens.
4. Click **Delete** to remove the highlighted line. A verification message displays: "Do you want to delete this row?" Click **Yes**. Repeat this step to remove each line in the PERSONNEL BUDGET DETAILS window.
5. When all lines have been deleted, click **OK**. The PERSONNEL BUDGET DETAILS window closes, and focus returns to the period tab.
6. Click the **Delete Line Item** icon or select **Items > Delete Line Item…**.

Note: You cannot use the **Delete** key to delete a line item. You must use the **Delete Line Item** icon or the menu selection.

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7. A confirmation message displays. Click **Yes** to delete or **No** to keep the line.
8. Click the **Save** icon or select **File > Save**.

Deleting a Non-Personnel Line Item

1. Open the tab for the budget period you want to delete the line item from.
2. Select the line item. When selected, it is highlighted in yellow.
3. Click the **Delete Line Item** icon or select **Items > Delete Line Item…**.

Note: You cannot use the **Delete** key to delete a line item. You must use the **Delete Line Item** icon or the menu selection.

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4. A confirmation message displays. Click **Yes** to delete or **No** to keep the line.
5. Click the **Save** icon or select **File > Save**.

Adding a Line Item to One or More Periods

1. Open the tab for the budget period to which you want to add the line item. If you are adding the line item to more than one period, open the tab for the first period to which the line item will be added.
2. Follow the instructions in *Adding Personnel Line Items* (page *54*), *Adding Non-Personnel Line Items* (page 63), or *Adding Subaward Line Items* (page 64), depending on the type of line item you are adding.
3. To apply the line item to later periods, click to select it and select **Items > Apply to Later Periods**.
4. Click the **Save** icon or select **File > Save**.

Changing a Line Item and Applying It to Later Periods

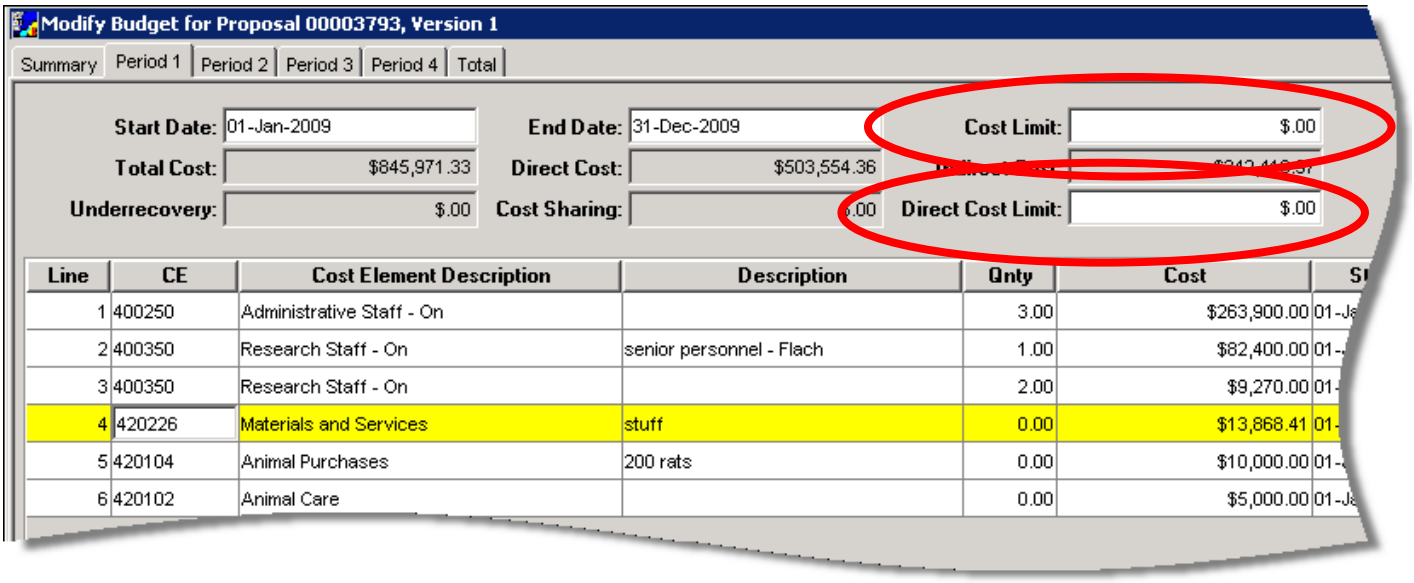
1. Open the tab for the budget period in which you want to change the line. If the line item applies to more than one period, open the tab for the first of those periods.
2. Click to select the line item to change. The line is highlighted in yellow when selected.
3. Do one of the following, depending on the type of line item you are changing:
4. For a personnel line item, click the **Personnel Budget for Line Item** icon or select **Items > Personnel Budget…**. Make the change in the PERSONNEL BUDGET DETAILS window and click **OK**.
5. For a non-personnel line item, double-click the line and make changes in the BUDGET – LINE ITEM DETAIL window. Click **OK**.

6. To add the line item to later periods, click to select it and select **Items > Apply to Later Periods**.
7. Click the **Save** icon or select **File > Save**.

Syncing Line Items to a Cost Limit

This calculation tool enables the user to adjust a non-personnel line item to meet a total cost limit. Coeus calculates the required overhead, adds (or subtracts) the direct cost to the selected line item, and calculates the indirect cost. If the amount of a line item is reduced, Coeus displays a confirmation message.

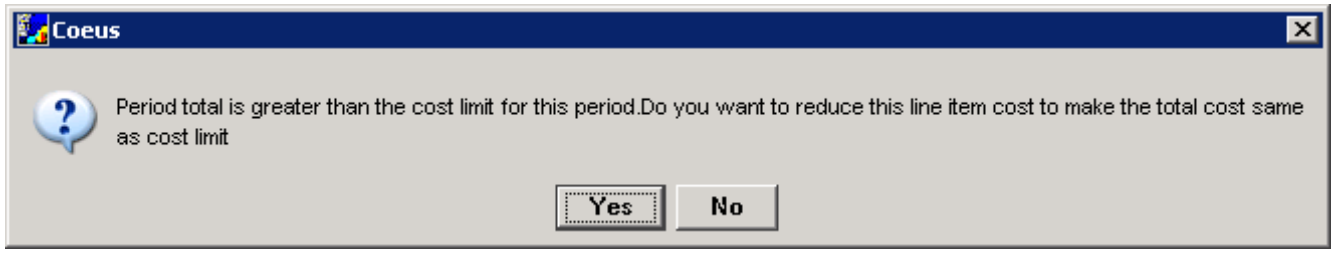
1. Open the tab for the period you want to work in.
2. Enter the limit for the period in either the Period **Cost Limit** field or **Direct Cost Limit** (circled below).



3. Click to select a non-personnel line item to adjust.

Note: Consider performing this action incrementally, selecting a different line item for each calculation to distribute the increase or decrease. A personnel line item cannot be synced to the period cost limit.

4. Select
   a. **Items > Sync to Period Cost Limit** or
   b. **Items > Sync to Direct Cost Limit**
   - If the budget is being decreased, this message displays.



   - Click **Yes**. The amount in the **Cost** field of the selected line item is decreased.
   - If the budget is being increased, the amount in the **Cost** field of the selected line item is increased.
5. Repeat steps *1* through *4* for all periods in the budget.
6. Click the **Save** icon or select **File > Save**.

Cost Sharing

Cost sharing manages the funds in excess of the sponsor's support, to be provided by another source, for the specific proposal.

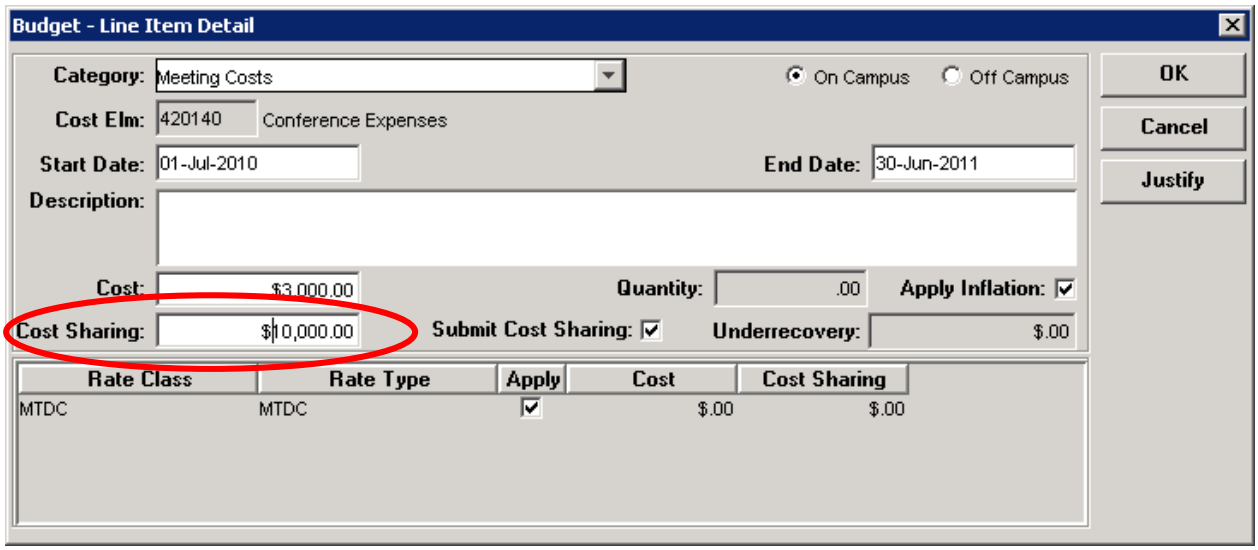
Entering Cost Sharing by PI or Project Person

1. Click on the personnel line item to cost share.
2. Click the **Personnel Budget for Line Item** icon or select **Items > Personnel Budget…**. The PERSONNEL BUDGET DETAILS window opens.
3. Enter a percentage in the **% Effort** field that is greater than the percentage in the **% Charged** field.

   Example: A Professor/PI with a nine-month base salary of $90,000 ($10,000 per month) added to the budget for one summer month (7/1 – 7/31) at 100% effort and 50% charge generates $5,000 + EB + F&A in cost sharing.
4. Click **OK**. The PERSONNEL BUDGET DETAILS window closes.
5. Click the **Save** icon or select **File > Save**.

Entering Cost Sharing Manually

1. Double-click a non-personnel line item. The BUDGET – LINE ITEM DETAIL window opens.
2. Enter the dollar value in the **Cost Sharing** field. The total cost sharing expense is added to the Period total, including any indirect expenses.



3. Click **OK**. The BUDGET – LINE ITEM DETAIL window closes.
4. Click the **Save** icon or select **File > Save**.

Entering Cost Sharing for Sub Awards

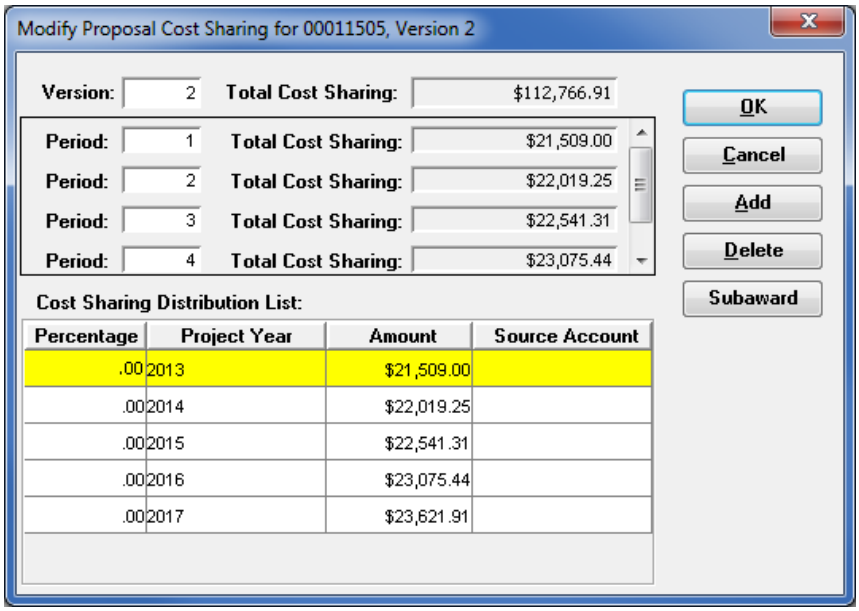
From the proposal's budget, use the menu path **Edit>Subaward** to open the Sub Award Budget window.

- Select the **Organization** to maintain
- click the **Sub Award Details** button to open the SUB AWARD DETAIL ENTRY window
- **Cost Sharing** column is meant to be **user entered** – there are no values in the uploaded form to sync.
- **Proceed to Cost Sharing Distribution**

For additional Sub Award Details instructions, see Uploading and Translating Subaward Files

Distributing Cost Sharing Expense

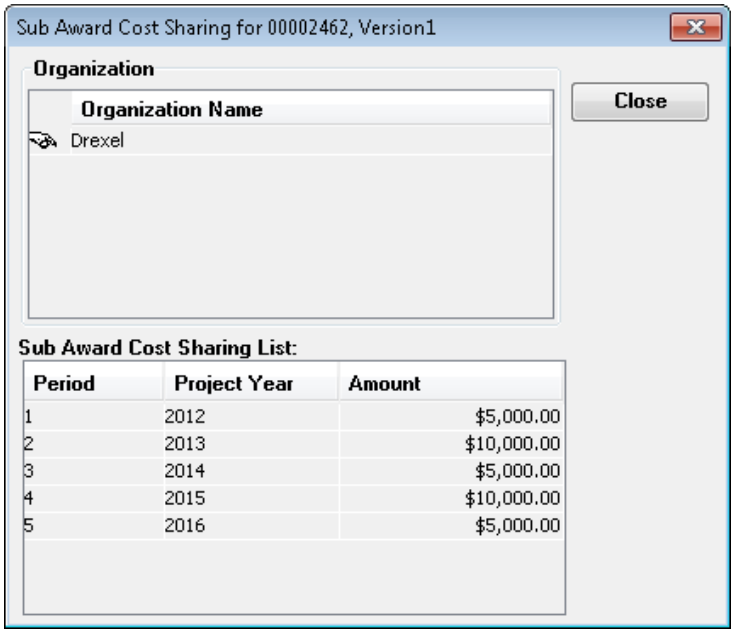
1. Select **Edit > Cost Sharing Distribution…**. The MODIFY PROPOSAL COST SHARING window opens.



2. Enter a percentage of the cost share expense in the **Percentage** column or the dollar value in the **Amount** column for each fiscal year with a cost sharing expense.
3. Edit the **Project Year** to align with the budget period, if needed.
4. Enter an account number or source code in the **Source Account** field for each fiscal year that has a cost sharing expense. For waived F&A use code VP-R.
5. To split an amount among sources, click **Add** to add one or more lines to the **Cost Sharing Distribution List**. Make entries in the added lines as in the steps above.
6. Click **Delete** to remove any lines that do not show distribution.
7. Click **Subaward** to open the maintenance window.

   a. 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.)

   b. 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.

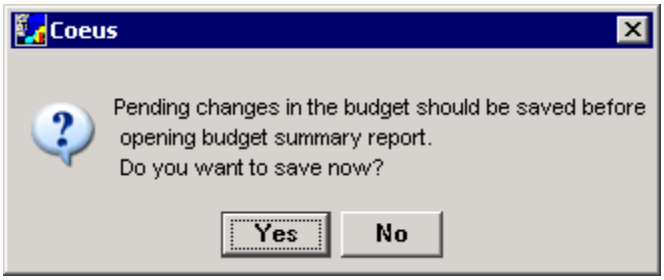


8. Click **OK**. The MODIFY PROPOSAL COST SHARING window closes.
9. Click the **Save** icon or select **File > Save**.

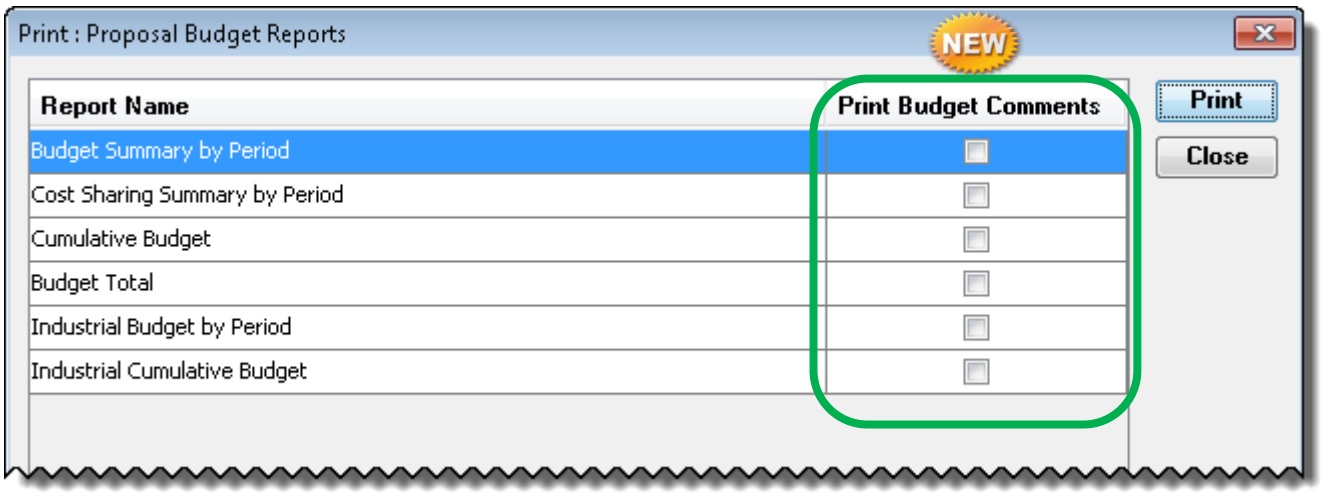
Printing a Budget Summary Report

The budget summary reports can be viewed online or printed. They show all budget periods for the proposal. See *Appendix: Budget Summary Report Samples*, page 138, for examples of these reports.

1. From the MODIFY BUDGET FOR PROPOSAL screen click the **Calculate** icon or select **Budget Periods > Calculate All Periods**.
2. Select **File > Budget Summary…**.
   a. If you have made changes to the budget but have not saved them, this message displays.



   b. Click **Yes**.
3. The PRINT: PROPOSAL BUDGET REPORTS window opens.



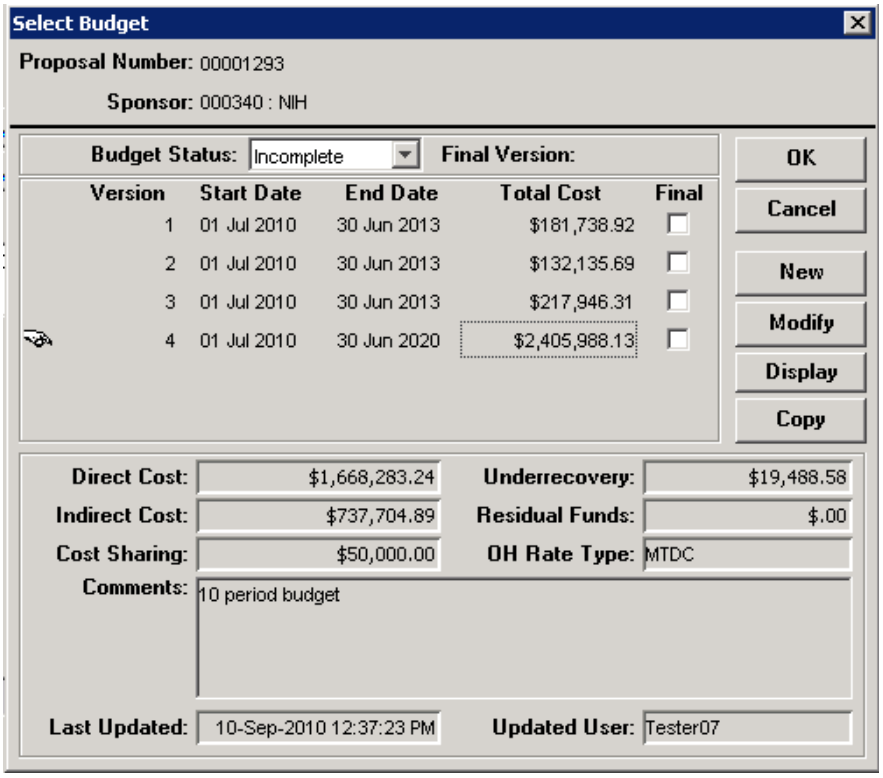
4. Click a **Report Name** to select a report to be printed
5. Click the check box in the **Print Budget Comments** column to include those on the report.
6. Click **Print**. A PDF file of the report opens in a new browser window.
7. Click the PDF **Save** icon in the browser to save a copy of the report.

Modifying an Existing Budget

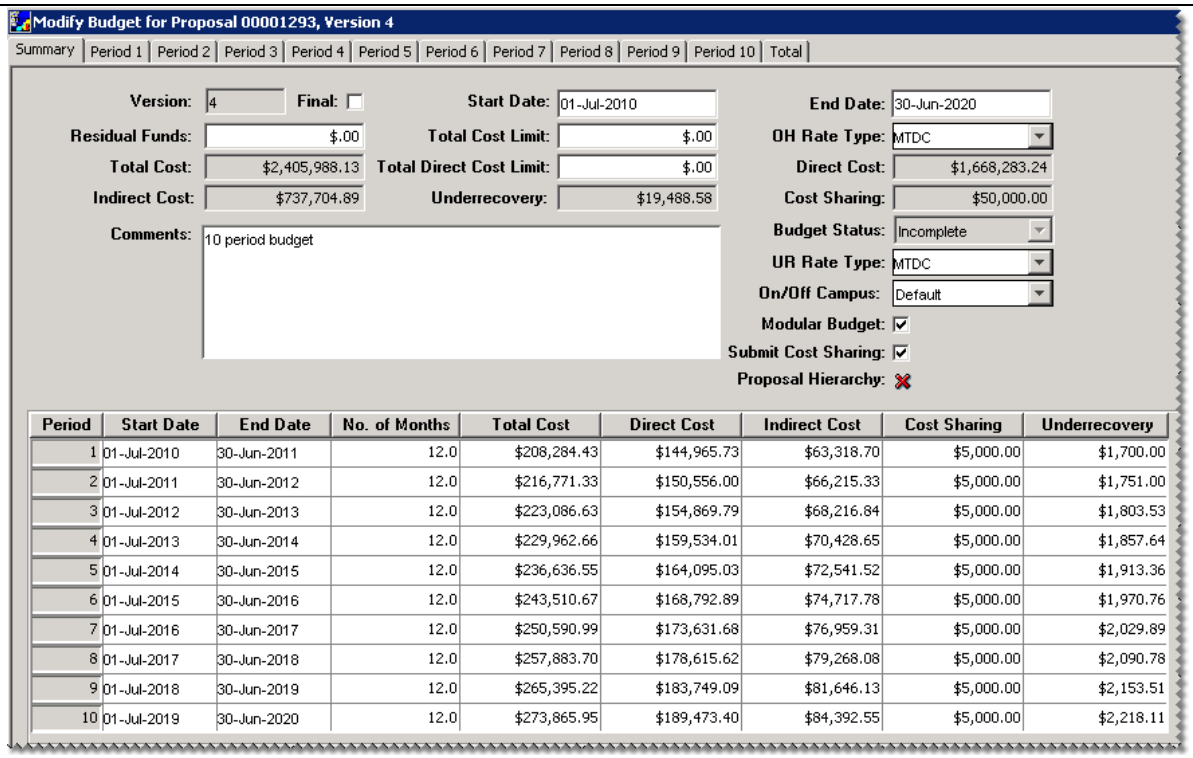
You can make changes to an existing budget version or create a new version to try different scenarios. You can have any number of versions, but only the one marked **Final** and **Complete** will be included in the final proposal.

Modifying a Budget Version

1. Open the SELECT BUDGET window (see *Opening a Budget*, page *47*).



2. Click to select the version to modify. The icon on the left points to the selected version.
3. Click **Modify**. The MODIFY BUDGET FOR PROPOSAL screen for the selected version opens.



Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Jul-2010	30-Jun-2011	12.0	$208,284.43	$144,965.73	$63,318.70	$5,000.00	$1,700.00
2	01-Jul-2011	30-Jun-2012	12.0	$216,771.33	$150,556.00	$66,215.33	$5,000.00	$1,751.00
3	01-Jul-2012	30-Jun-2013	12.0	$223,086.63	$154,869.79	$68,216.84	$5,000.00	$1,803.53
4	01-Jul-2013	30-Jun-2014	12.0	$229,962.66	$159,534.01	$70,428.65	$5,000.00	$1,857.64
5	01-Jul-2014	30-Jun-2015	12.0	$236,636.55	$164,095.03	$72,541.52	$5,000.00	$1,913.36
6	01-Jul-2015	30-Jun-2016	12.0	$243,510.67	$168,792.89	$74,717.78	$5,000.00	$1,970.76
7	01-Jul-2016	30-Jun-2017	12.0	$250,590.99	$173,631.68	$76,959.31	$5,000.00	$2,029.89
8	01-Jul-2017	30-Jun-2018	12.0	$257,883.70	$178,615.62	$79,268.08	$5,000.00	$2,090.78
9	01-Jul-2018	30-Jun-2019	12.0	$265,395.22	$183,749.09	$81,646.13	$5,000.00	$2,153.51
10	01-Jul-2019	30-Jun-2020	12.0	$273,865.95	$189,473.40	$84,392.55	$5,000.00	$2,218.11

4. Make your changes. Refer to preceding sections of this chapter for instructions.
5. Click the **Save** icon or select **File > Save**.
6. You may need to make additional edits if any warnings appear regarding Appointment Types, Period Types, or Cost Elements. A warning will appear if any of these have been made inactive since the budget was last modified. You will be required to remove inactive elements or select a valid alternative.

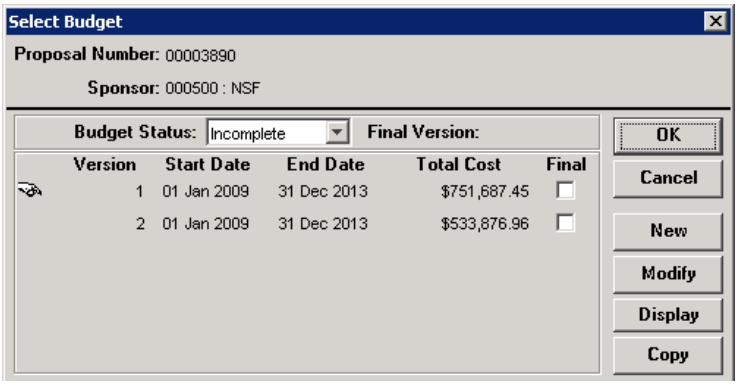
Creating a New Version

Coeus provides two options for creating a new version of the budget. Instructions for both options are given here.

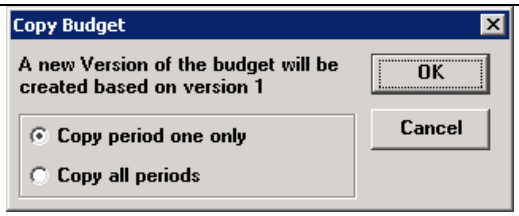
Copying an Existing Version

Before you copy a budget version, be aware of the changes you want to make. If you will make a minor change that occurs in one or two line items, copy all periods. If you will make extensive changes to staff, effort, and line items, copy only Period 1 and generate the remaining periods.

1. Open the SELECT BUDGET window (see *Opening a Budget*, page *47*).



2. Click to select the version to copy. The icon on the left points to the selected version.
3. Click **Copy**. The COPY BUDGET window opens.

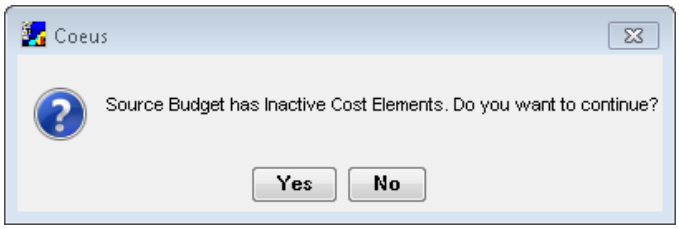


4. Select one of the options buttons, depending on the type of changes you will make. Click **OK**.

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.

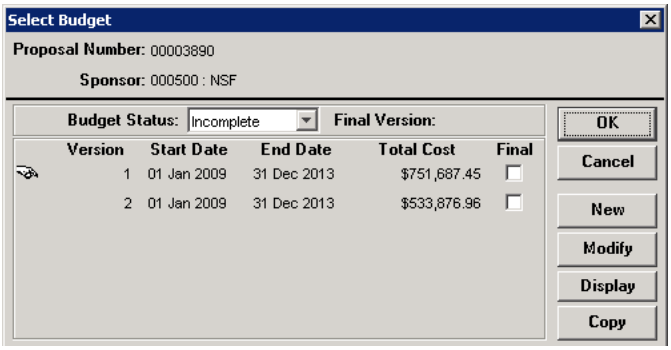
This warning will occur if a budget person has an Appointment or Period Type that has been made inactive. You may continue with the selected budget, or click 'No' and opt to create a new budget.



5. The MODIFY BUDGET FOR PROPOSAL screen for the new version opens (see page *82*).
6. Create the new budget version. Refer to preceding sections of this chapter for instructions.

Creating a Version Without Copying

1. Open the SELECT BUDGET window (see *Opening a Budget*, page *47*).



2. Click **New**. The CREATE BUDGET FOR PROPOSAL screen (see page *49*) opens, displaying the new version number.
3. Create the new budget version. Refer to preceding sections of this chapter for instructions.

Finalizing the Budget

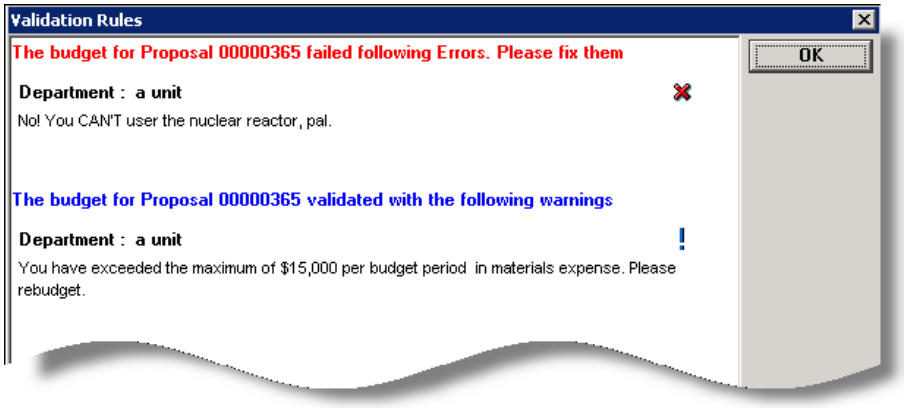
One version of the budget must be marked **Final** and **Complete** before the proposal is submitted for approval. This is the only version that will be submitted to the sponsor. You can finalize the version on the SELECT BUDGET window list or on the version's SUMMARY tab.

Perform Budget Validations:

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, the budget 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.

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

To perform budget validations prior to marking the budget complete, from the Budget module, use menu path **Action > Budget Validations**



Budget Validation Errors:

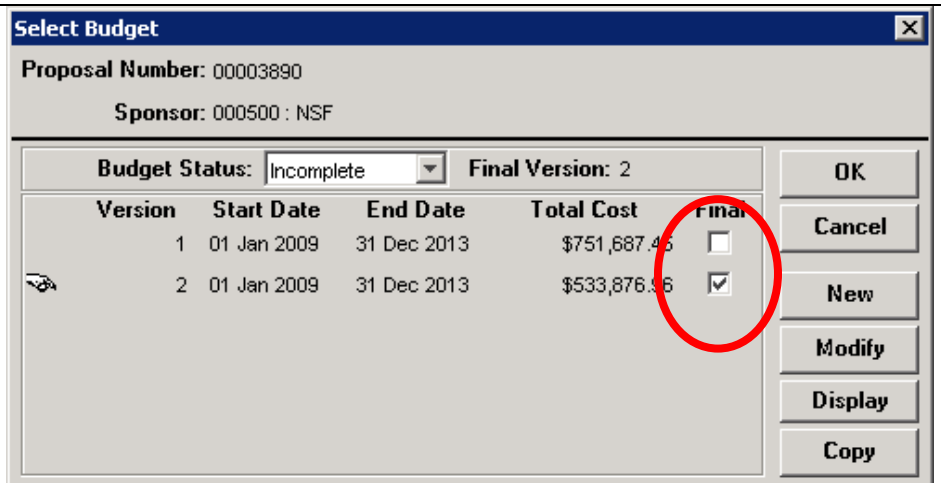
- If a proposal budget fails a validation rule, a red error notice is presented to the user.
- The Department (unit) where the rule is applied appears in the alert text, as validation rules can be applied at any level in the hierarchy.
- The text from the validation rule's User Message should be specific as 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:

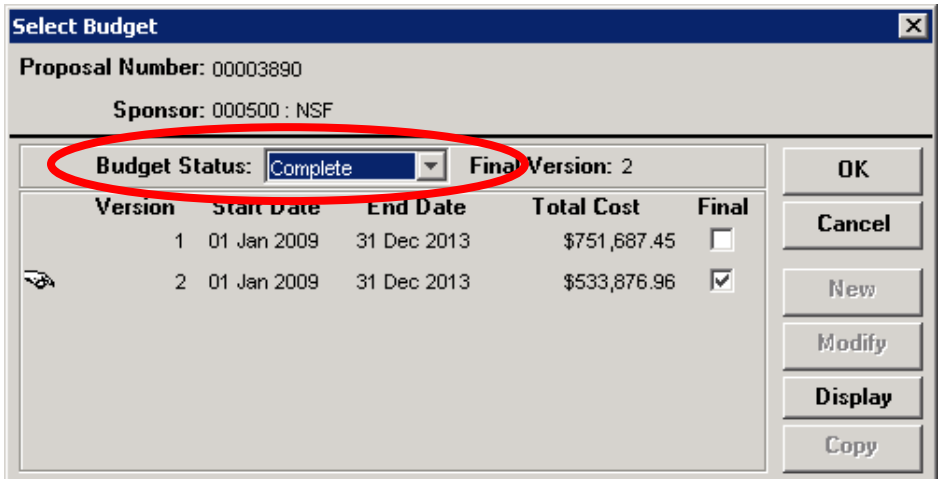
- Validation Warnings are presented under a blue validation notice.
- The Department (unit) where the rule is applied appears, as validation rules can be applied at any level in the hierarchy.
- Warning messages do *not* keep a budget from being marked Complete.
- If more than one budget validation warning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

On the Select Budget Window

1. Open the SELECT BUDGET window (see *Opening a Budget*, page *47*).



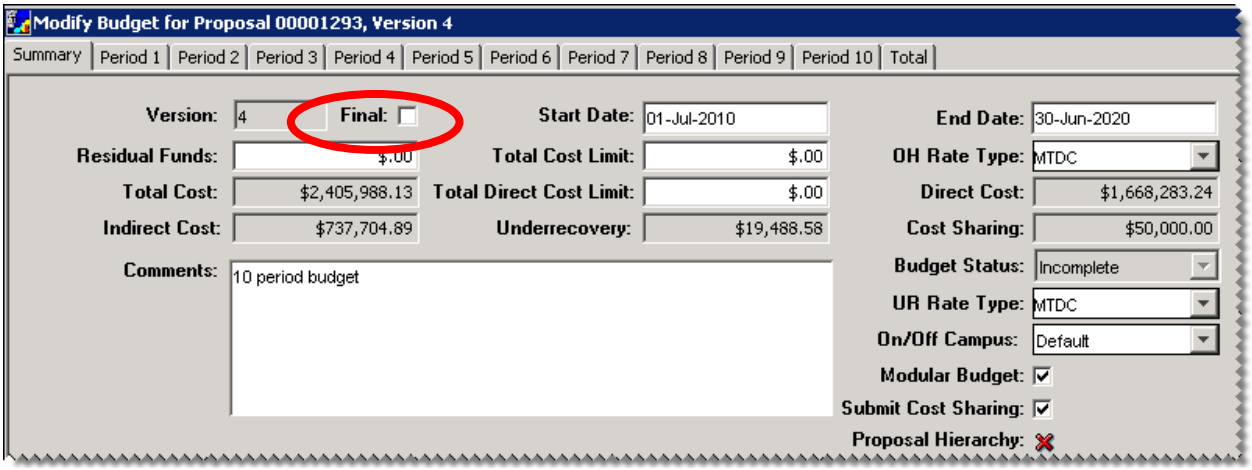
2. Select the **Final** checkbox (circled above) for the version. This message displays: “You are modifying the final version status. Are you sure?”
3. Click **Yes**.
4. In the **Budget Status** field (circled below) select **Complete** from the drop-down list.



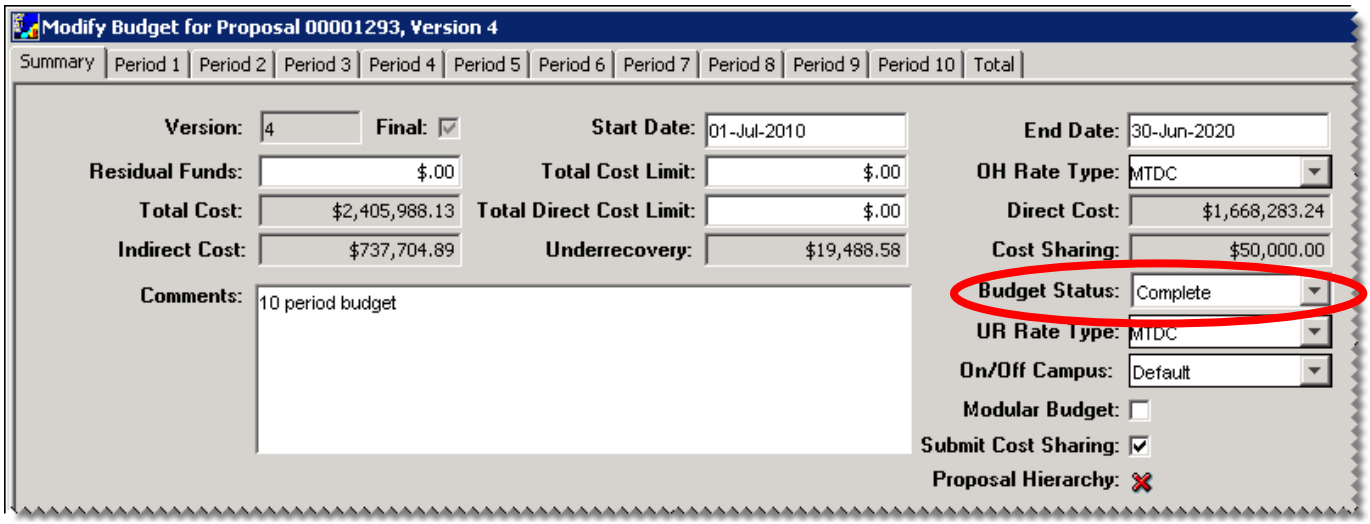
5. Click **OK**.
6. Click the **Save** icon or select **File > Save**.

On the Budget Summary Tab

1. Open the SUMMARY tab of the selected version.



2. Select the **Final** checkbox (circled above). This message displays: "You are designating a new final version. Are you sure?"
3. Click **Yes**.
4. In the **Budget Status** field (circled below) select **Complete** from the drop-down list.
5. Confirm if Cost Sharing expense should be transmitted on the Grants.gov forms; if yes, keep the **Submit Cost Sharing** box checked, or uncheck the box to keep this information from appearing on those forms.
6. Check the **Modular Budget** box if the NIH PHS398 Modular Budget form is selected. (See section on creating a modular budget).



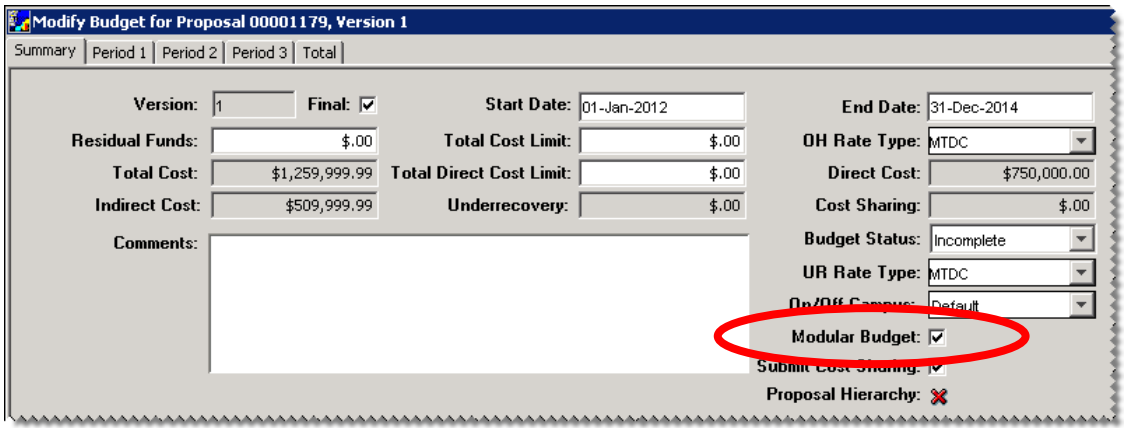
7. Click the **Save** icon or select **File > Save**.

Creating a Modular Budget

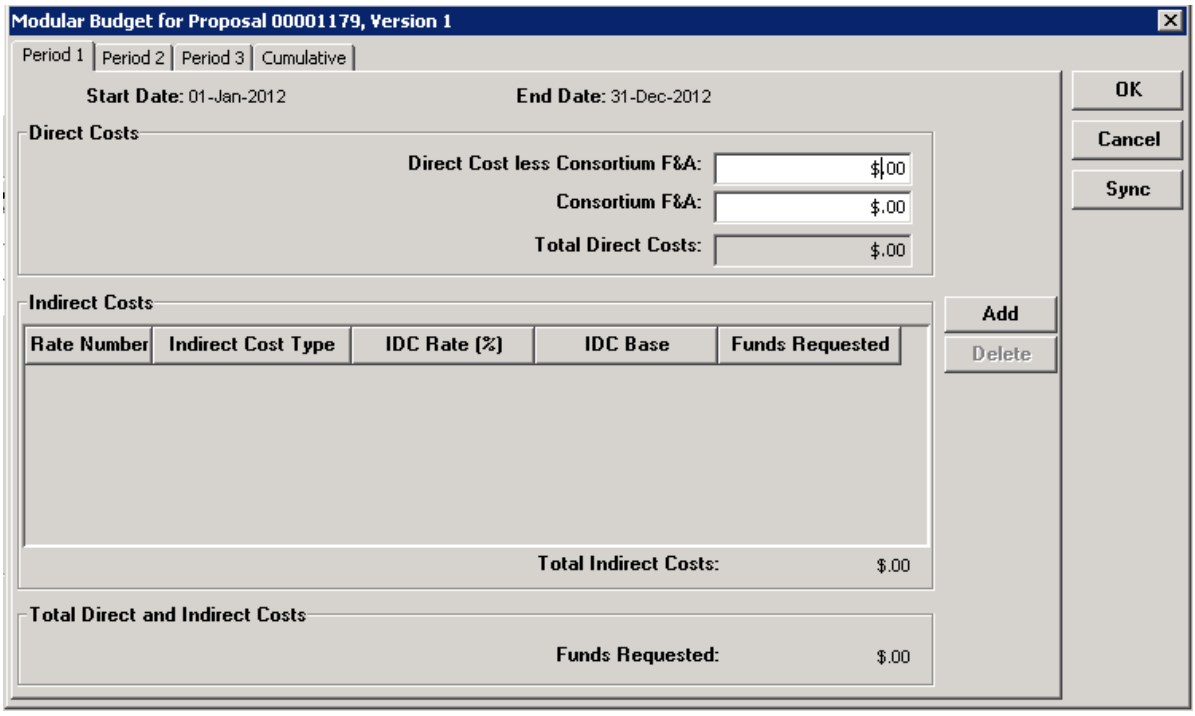
NIH is the only sponsor that requires modular budgets. See the sponsor opportunity for specific requirements. If you need to submit a modular NIH budget for your proposal, it is recommended that you follow the preceding instructions for creating a detailed budget so that you accurately calculate indirect expenses.

How to Create a Modular Budget

1. Create the detailed budget as explained in preceding sections of this chapter.
2. On the budget SUMMARY tab select the **Modular Budget** checkbox (circled below).



3. Select **Edit > Modular Budget**. The MODULAR BUDGET FOR PROPOSAL window opens.



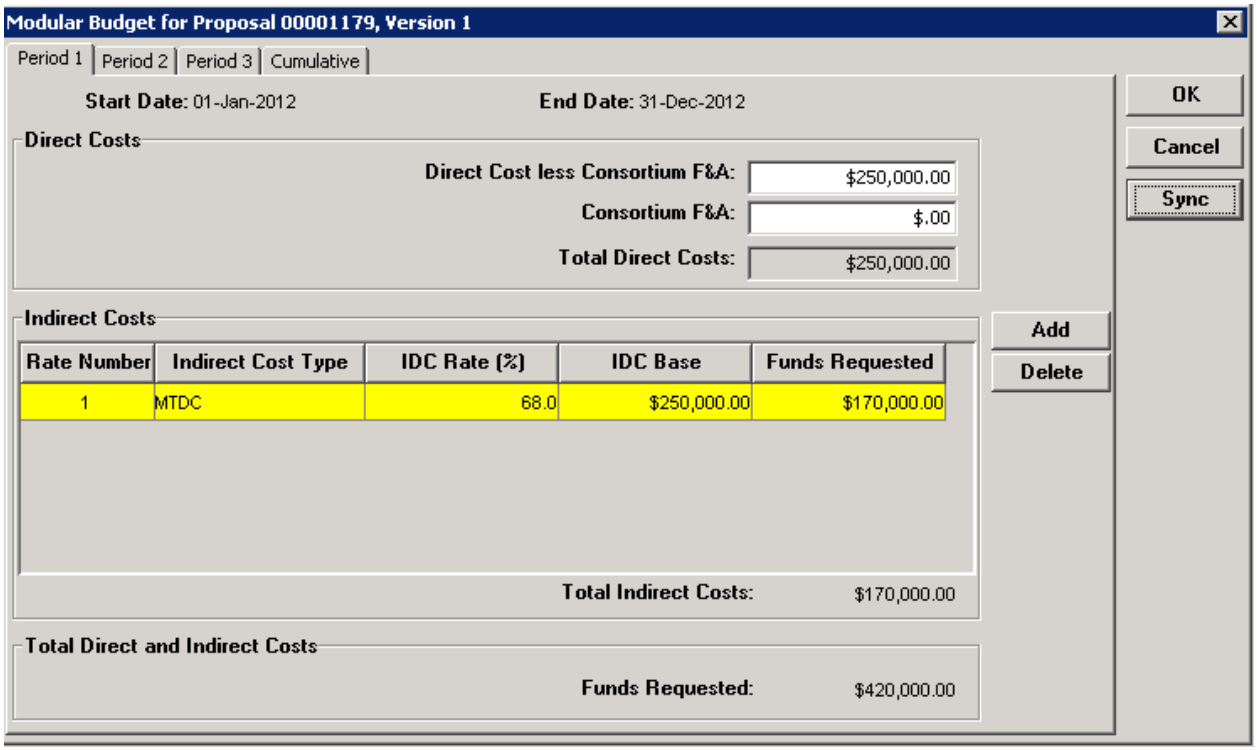
4. ***Optional*** (Do this if the modular budget is being created from a detailed budget.) Click **Sync**. Coeus synchronizes the modular budget with the budget you created, suggests the number of $25,000 modules, and uploads the calculated indirect costs and rates for each budget period.
5. If you did not create a detailed budget, enter all required data (see below) for each budget period.
6. Click **OK**. The MODULAR BUDGET FOR PROPOSAL window closes, and the modular budget is saved.

Note: If you make any changes to the detailed budget after creating the modular budget, you must return to the modular budget window and click **Sync** to refresh the window.

You can manually edit all fields in the MODULAR BUDGET FOR PROPOSAL window, but when you click **Sync**, and data you entered is overwritten with data generated by the sync process.

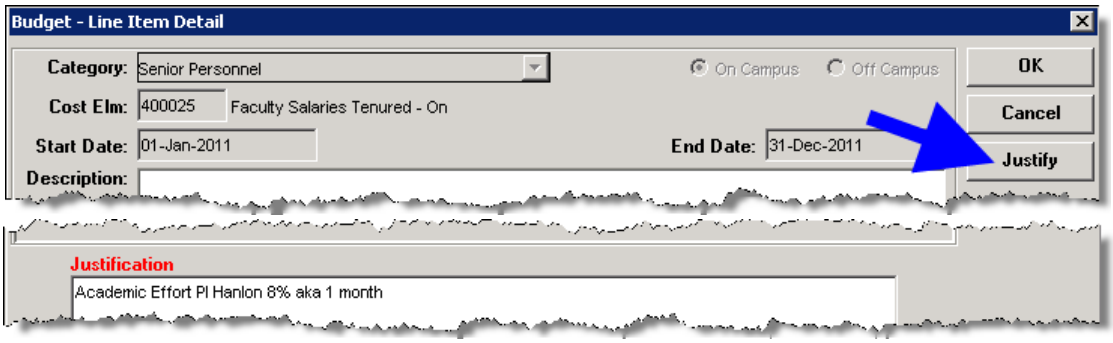
All fields in the MODULAR BUDGET FOR PROPOSAL window are ***required***.

- **Direct Cost Less Consortium F&A —** Direct cost for the period, calculated from the detailed budget and rounded up to the nearest $25,000. This value does not include any F&A generated by consortiums (subawards).
- **Consortium F&A —** The total F&A entered for any consortium or subawards using the GL or cost element for that purpose.
- **Indirect Costs**
  - ***Indirect Cost Type*** —Type of IDC, such as MTDC or TDC.
  - ***IDC Rate (%)*** — Rate of indirect cost applied to the period (or part of the period if a prorated base and total).
  - ***IDC Base*** — Funds in the budget that generate IDC.
  - ***Funds Requested*** — Indirect costs plus applied F&A.

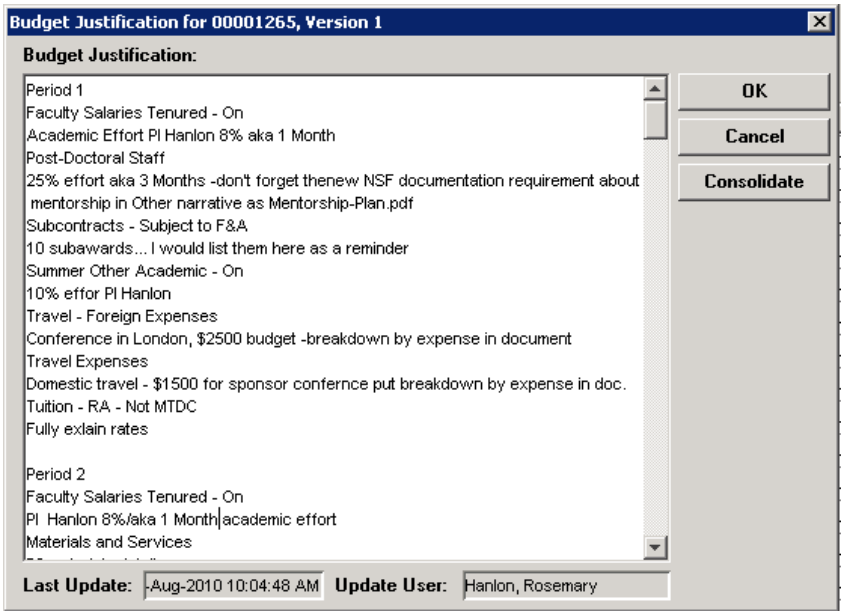


Creating the Budget Justification Document

You can consolidate the notes in the **Justification** field of the BUDGET – LINE ITEM DETAIL window and use them as the basis of the Budget Justification narrative document (see *Uploading Narratives*, page 90).



1. Open a blank document outside of Coeus (such as a Word document) to be used as the Budget Justification narrative document.
2. In the MODIFY BUDGET FOR PROPOSAL screen select **Edit > Budget Justification**. A blank BUDGET JUSTIFICATION window opens.
3. Click **Consolidate**. All justification notes are merged in the Budget Justification notepad.

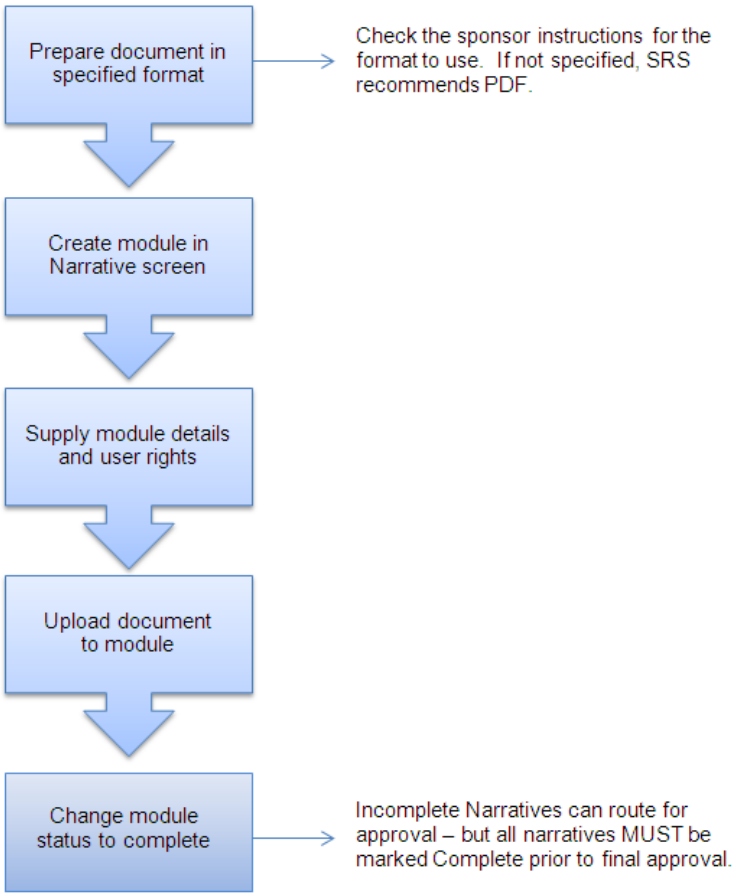


4. Select the text in the window and press **Ctrl+C** (Mac users press **Command**+**C**) to copy it.
   - The Budget Justification notepad entries can be edited in this window, but changes will not be returned to the line item detail.
   - Changes or additional line item budget justification entries made to the Budget Details will not appear unless the **Consolidate** button is used.
   - Repeated use of "Consolidate" button adds a new, complete justification list to the notepad. The new list will be separated by a row of asterisks (*********). Users may wish to delete the previous consolidated list (or cut and paste to an external document) before repeating the use of the Consolidate button.
5. Paste the text in the budget justification document and use this list as an aide to completing your sponsor's required elements.

TIP: Use this notepad tool to generate a list, and then cut and paste to an external document to format and conform to your sponsor and institutional requirements. This tool will not automatically create or generate a budget justification narrative attachment.

Overview of the Narrative Creation Process

The steps in creating a narrative are shown here.



About Narrative Modules

Narrative modules are Coeus containers for documents that are created outside of Coeus and are required for all submissions. You prepare each document according to instructions in the announcement and save it as a PDF (see *A Note About Document Format*, page 96) or other file type as specified by the sponsor. You then upload the document to the narrative module in Coeus.

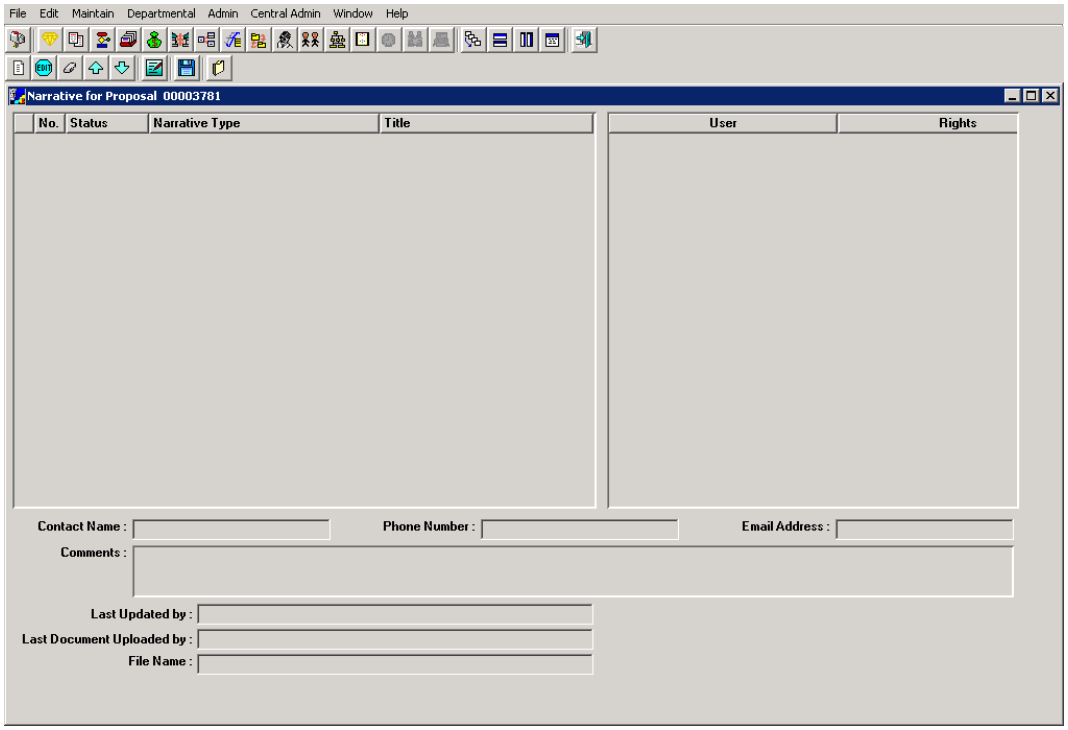
TIP: Link your proposal to the sponsor opportunity using the Action > Grants.gov ***before*** you maintain narratives. You won't be able to see and select most of the form-specific narrative types until you link to the opportunity.

Narrative Screen

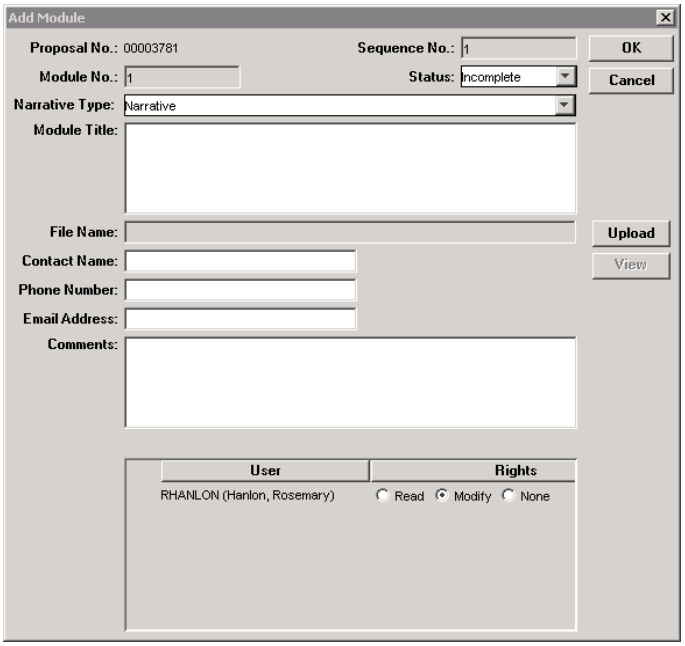
The Narrative for Proposal screen displays the narrative modules you create. The second toolbar (see *Coeus Interface*, page 9) at the top of the screen contains icons for working with narrative modules. That toolbar is shown here. Icons are shown when they are used in the instructions that follow.

Adding a Narrative Module

1. Prepare the document outside of Coeus. See the sponsor's instructions for information about the content and format of the document.
2. Do one of the following to open the NARRATIVE FOR PROPOSAL screen:
   a. Search for the proposal. Highlight it in the DEVELOPMENT PROPOSAL LIST screen and select **Edit > Narrative**.
   b. If you have the proposal open, from the PROPOSAL DETAILS screen click the **Proposal Narrative** icon or select **Edit > Narrative…**.



3. Click the **Add Module** icon or select **Edit > Add**. The ADD MODULE window opens.



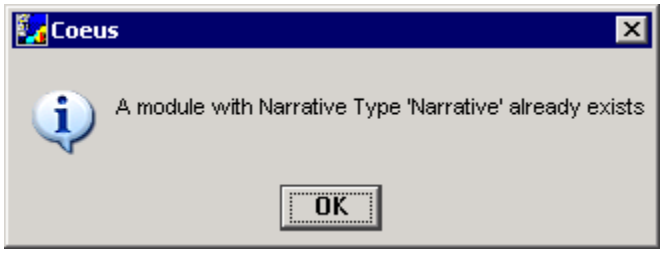
4. Supply the details for the narrative module:

   a. Select the **Narrative Type** from the drop-down list.

   If a Grants.gov opportunity has *not* been selected, only a brief list of default narrative types is available. A base, or default, list of types will always be presented.

   For proposals linked to Grants.gov opportunities, the narrative types available in the drop-down list directly relate to the needs of the s2s forms utilized by the Grants.gov opportunity selected. See the sponsor's instructions for the content and format anticipated for these narrative files.

   b. Most narrative types can be used only once. If you select a **Narrative Type** that can be used only once and that has already been used, a message similar to this displays:



   c. The **Module Title** field is ***required*** if the **Narrative Type** is one that can be used more than once (examples include: “other” “other attachment” and several PHS-specific “appendix” types, among others). When the narrative is one of these *multiple* types, the entry in the **Module Title** field is used as the file name. (See the funding opportunity or the sponsor requirements for file naming conventions.) Enter a unique title, and do not use any spaces or special characters. See *What “No Special Characters” Means*, page 142.
   For a single-use **Narrative Type** this field is for your reference and is optional.

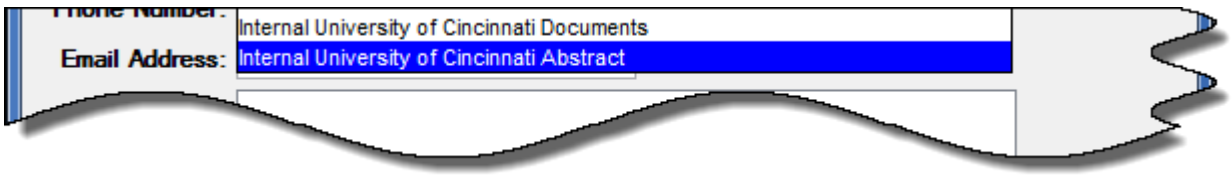
   d. The **Contact Name**, **Phone Number**, **Email Address**, and **Comments** fields are optional.

   e. You can control which users are allowed to modify or read the narrative file. Specify each user's access rights in the pane on the right of the screen. As proposal aggregator you have ***Modify*** rights, which you should not change. The rights are:

Right	Meaning
Read	User can read the document and details but cannot update either.
Modify	User can read the document and details, upload a new file to this module, and update the details.
None	User cannot open the file or details.

   f. You can either upload the file now, or click **OK** to return to the NARRATIVE FOR PROPOSAL window and upload the file to this narrative placeholder at a later time. The status of the narrative will default to Incomplete if you do not upload a file.

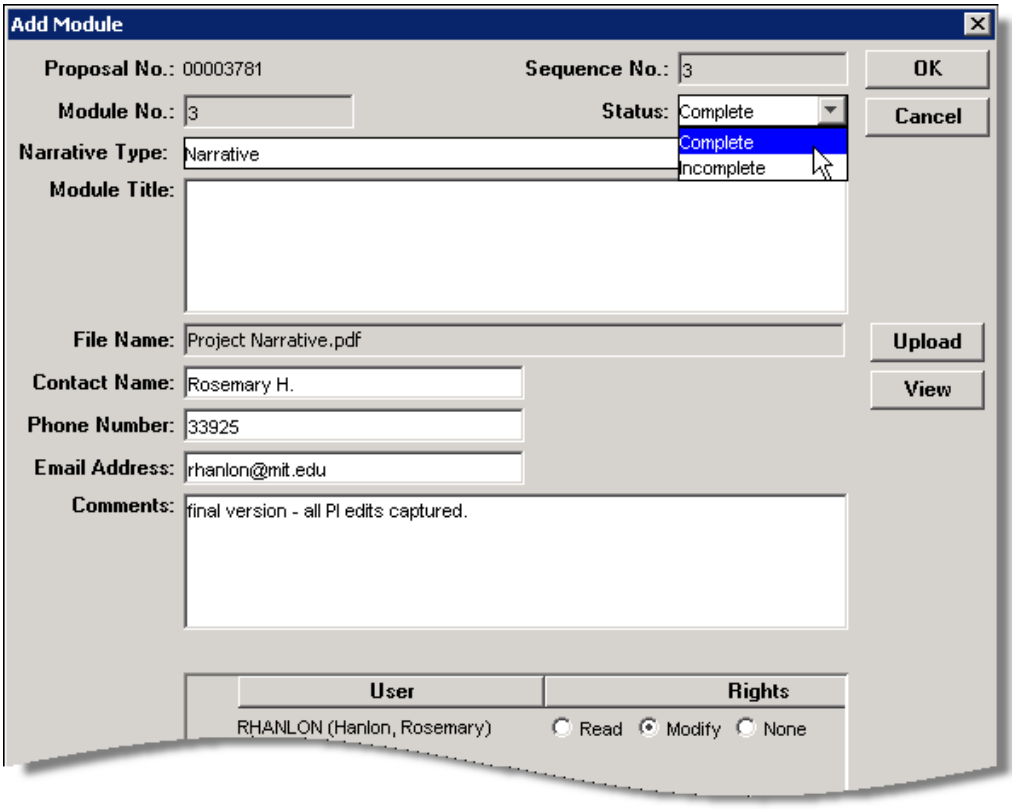
   g. Be sure to upload the proposal abstract.



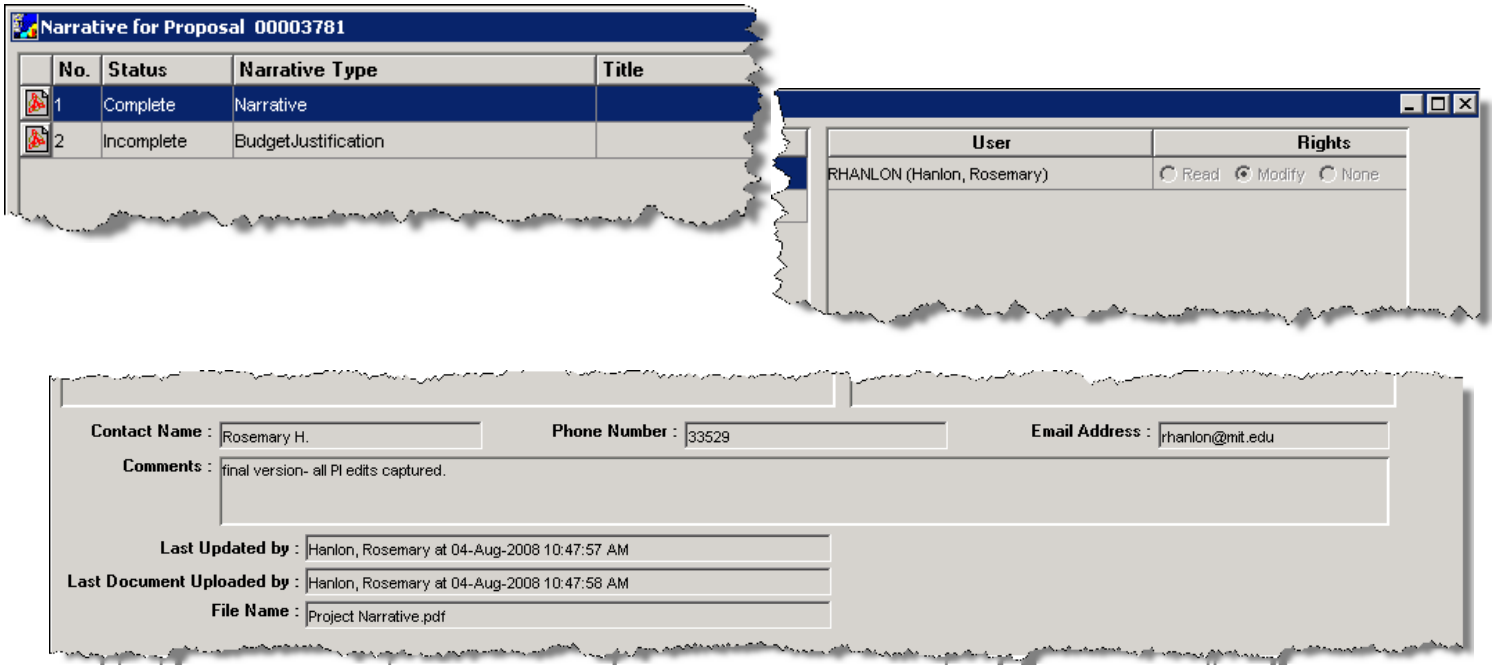
Uploading a Narrative from the Add Module window

In the ADD MODULE window.

1. Use the **Upload** button. A file browser window opens.
2. Locate your file and select Open. The focus returns to the ADD MODULE window.
   a. Use the View button to preview the file and confirm it is the correct one in the proper file format.
   b. Change the status to complete using the drop-down option in the **Status** field, if appropriate.
   c. Leave the **Status** field at ***Incomplete*** if the file is still in draft mode.
   d. Change the status to **Complete** if the file is ready to be approved and submitted to the sponsor. Incomplete narratives can route for internal approval, but *must* be Complete to support **final approval** actions. Incomplete status cannot achieve "submitted" status.



3. Click **OK**. The ADD MODULE window closes, and the NARRATIVE FOR PROPOSAL window regains focus. (see Module #1 in the graphic below).
   a. An attachment icon will be displayed beside the module identifying the upload.
   b. At the lower portion of the window, user timestamps and the file name will be displayed for the highlighted entry.



Uploading a Narrative Module from the Narrative for Proposal window

1. In the NARRATIVE FOR PROPOSAL window highlight the **Narrative Type** line for the narrative you will update.
2. Select the **Upload Attachment** icon or select **Edit > Upload Attachment.** A file browser window opens.
3. Select the file to upload and click **Open**. The focus will return to the Narrative window and the Upload Attachment icon will be displayed beside the module.
4. The default status will be set to **Incomplete**. Change the status to **Complete** to ensure the proposal completes the review and approval cycle, and will successfully submit to the sponsor. See the section on Modifying Narratives to change the status to complete.
5. Repeat the upload steps for any narrative types established as placeholders.

Modifying a Narrative Module

The modifications that can be made to narrative modules depend on the proposal status, as explained in the following table.

Proposal Status	Allowed Narrative Module Modifications
In Progress	Existing modules and module details can be updated, new narrative modules can be added, modules can be deleted, and narrative type can be changed.
Approval in Progress	**Only *existing* modules** and module details can be updated. When a module is updated, the approvers are notified so they can review the modified module. New narrative modules *cannot* be added, and existing modules *cannot* be deleted.
Recalled	Existing modules and module details can be updated, new narrative modules can be added, modules can be deleted, and narrative type can be changed.
Rejected	Existing modules and module details can be updated, new narrative modules can be added, modules can be deleted, and narrative type can be changed.
Submitted	Modifications are **not allowed** because the proposal is now an Institute record.

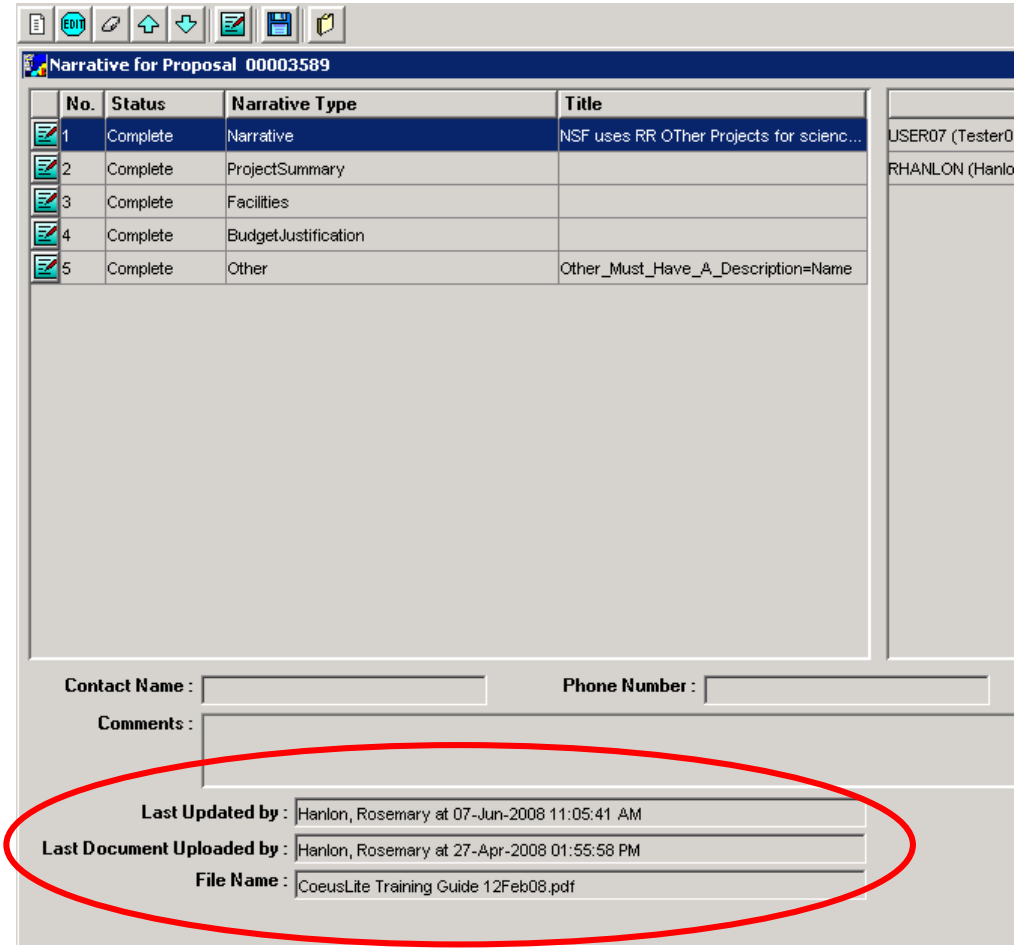
Updating a Narrative File

Use this procedure to refresh an already uploaded narrative file with a file of the same type

1. Do one of the following to open the NARRATIVE FOR PROPOSAL screen:
   a. Search for the proposal. Highlight it in the PROPOSAL DEVELOPMENT LIST screen and select **Edit > Narrative**.
   b. If you have the proposal open, from the PROPOSAL DETAILS screen click the **Proposal Narrative** icon or select **Edit > Narrative…**.
2. Highlight the **Narrative Type** line to refresh and do the following:
   a. Click the **Modify Module** icon or select **Edit > Modify**. The EDIT MODULE window opens.
   b. Select the file to upload and click **Open**. The file uploads and replaces the existing one.
      i. Use the Upload button to open a file browser window.
      ii. Select the file to upload and click **Open**. The file uploads and replaces the existing one.
3. Check that the uploaded attachment is the correct file and format.
   a. From the NARRATIVE FOR PROPOSAL window, click on the Attachment icon.
   If you have the appropriate software on your computer, the file will open in a new browser window.

b. From the EDIT MODULE window, click the View button. If you have the appropriate software on your computer, the file will open in a new browser window.

4. If the incorrect file was uploaded, locate the correct one and repeat either Modify procedure.
5. Coeus automatically saves the narrative file to the Coeus Application Server.
6. Confirm that the Narrative **Status** is set to **Complete**.
7. The data at the lower portion of the window will be updated to reflect the modification date, time, and user.
8. If the proposal's status is Approval in Progress, an email message is sent to all approvers alerting them that the file in the module has been updated.



Updating Narrative Module Details

This procedure makes changes to the details without changing the uploaded file.

1. Do one of the following to open the NARRATIVE FOR PROPOSAL screen:
   a. Search for the proposal. Highlight it in the PROPOSAL DEVELOPMENT LIST screen and select **Edit > Narrative**.
   b. If you have the proposal open, from the PROPOSAL DETAILS screen click the **Proposal Narrative** icon or select **Edit > Narrative…**.
2. Select the module to modify by clicking to highlight it in the list.
3. Click the **Modify Module** icon or select **Edit > Modify**. The EDIT MODULE window opens.
4. Make changes in the available detail fields (**Status, Module Title, Comments**, etc.) and click **OK**.
5. Click the **Save** icon or select **File > Save**.

Deleting a Narrative Module

Deleting a narrative module removes the file from the proposal and deletes all detail information. Do not use this procedure if you want to replace an uploaded file; to do that, see *Updating a Narrative File*, page 94.

1. Do one of the following to open the NARRATIVE FOR PROPOSAL screen:
    a. Search for the proposal. Highlight it in the PROPOSAL DEVELOPMENT LIST screen and select **Edit > Narrative**.
    b. If you have the proposal open, from the PROPOSAL DETAILS screen click the **Proposal Narrative** icon or select **Edit > Narrative…**.
2. Select the module to delete by clicking to highlight it in the list.
3. Click the **Delete Module** icon or select **Edit > Delete Module**.
4. Click the **Save** icon or select **File > Save**.

Modify or Re-Order Narrative Module Order

You can organize the modules in the list for your convenience.

To change the order of modules in the NARRATIVE FOR PROPOSAL window, select (highlight) a module and

1. Click either the **Move Module Up** or **Move Module Down** icon ,
2. Or select **Edit > Move Up** or **Edit > Move Down**.
3. Click the **Save** icon or select **File > Save**.

Notes on Copied Grants.gov Proposals & Narratives

When the **Copy Proposal** option includes the Narratives, Coeus will copy all the narrative types and uploaded files. These copied narrative 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 the Narratives module, all of the copied narrative types – even Grants.gov opportunity specific - can be viewed and maintained *prior* to linking the newly copied proposal to a valid Grants.gov opportunity.

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.

Note on Document Format

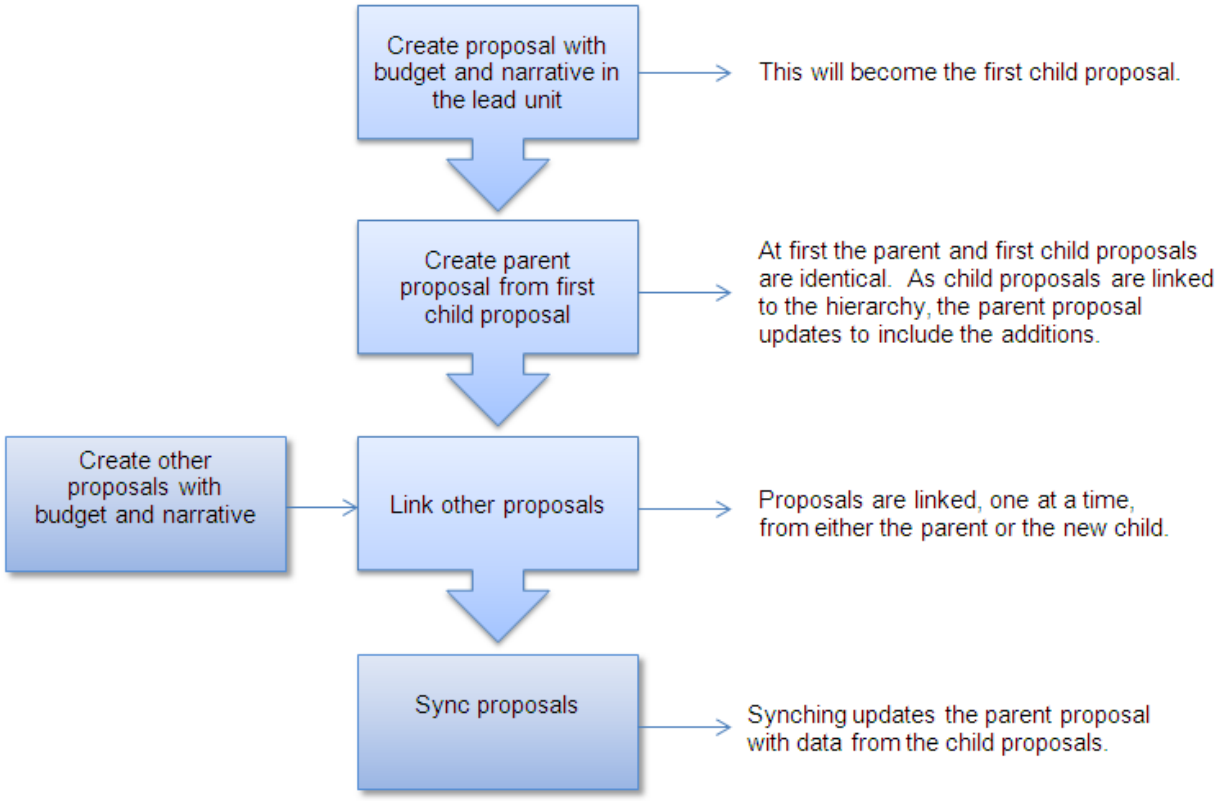
Refer to instructions from the sponsor, such as the application or submission policy guide and the specific opportunity instructions, to determine the file format for narrative documents.

If you have a choice between Word and PDF, or if no format is specified, conversion to PDF format is recommended. Many sponsors have strict page count limits for narrative modules. Due to several variables, the same Word file can have a different number of pages on another computer, due to local margin and format settings. In contrast, a PDF file will always look the way it does when you create it. That means you have complete control over the format the sponsor will see, including margin width and page count, when you upload a narrative in PDF format.

Overview of the Hierarchy Creation Process

A proposal hierarchy combines multiple budgets to submit as one. A hierarchy consists of two levels: one parent proposal and one or more child proposals. The parent is created from a child proposal, and then other child proposals are linked to the hierarchy. The resulting group is submitted as a single proposal.

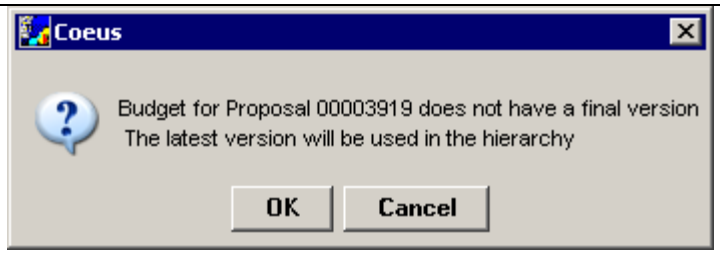
Before you create the parent proposal, decide which child proposal you will use to create it. Often hierarchies are created with proposals from different units. When that is the case, the parent proposal should be created from the child proposal for the lead unit of the project.



Creating a Hierarchy

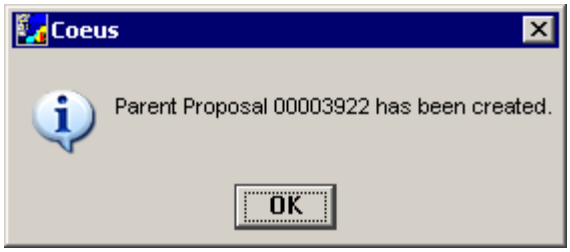
Creating the Parent Proposal

1. Click the **Maintain Proposal Development** icon or select **Maintain > Proposal Development…**. The DEVELOPMENT PROPOSAL LIST screen opens with the SELECT DEVELOPMENT PROPOSAL window over it.
2. Enter search criteria (see *Searching for a Proposal*, page 132) for the child proposal to use for creating the parent and click **Find**.
3. Select the proposal from the results and click the **Modify Selected Proposal** icon or select **Edit > Modify Proposal…**.
4. Select **Edit > Create Hierarchy**. If the proposal you are using to create the parent does not have a budget version marked **Final**, this message displays.



Click **OK** to continue: the ***highest number Budget Version*** will be used; or click **Cancel** to discontinue hierarchy creation and return to mark a budget Final.

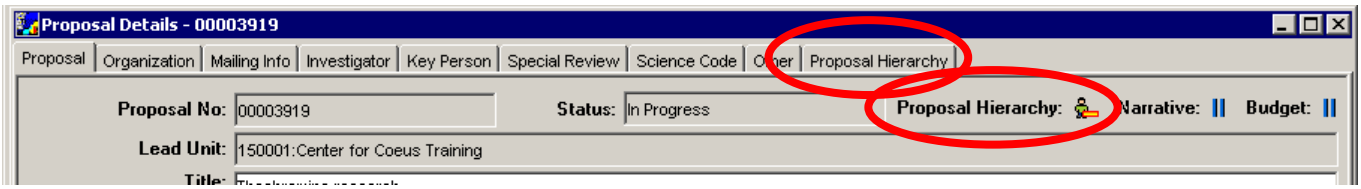
5. Coeus creates the parent proposal and displays this message.



6. Make a note of the parent proposal number.
7. Click the **Close** icon or select **File > Close**.

The proposal you just created is the new parent proposal, and the one you just closed is the first child proposal. Open the first child proposal again and you will see these changes:

- The PROPOSAL DETAILS screen has a new tab, PROPOSAL HIERARCHY.
- On the PROPOSAL tab of the PROPOSAL DETAILS screen, the icon in the Proposal Hierarchy space in the upper right corner has changed from to , indicating this proposal is a child in a hierarchy.



- The second toolbar has a new icon, **Sync to Parent** , and the corresponding menu item **Edit > Sync to Parent** has been added.

Open the new parent proposal and you will see these features:

- The PROPOSAL HIERARCHY tab is part of both the PROPOSAL DETAILS screen and the BUDGET screen.
- The Proposal Hierarchy space on the PROPOSAL tab has the icon , indicating this proposal is the parent in a hierarchy.
- The second toolbar has the **Sync All** icon , and there is a corresponding menu item, **Edit > Sync All**.

At this point you have a hierarchy with the parent proposal and one child proposal. Now you can link other child proposals.

A note about CoeusLite and Hierarchy:

Proposals can be created in CoeusLite or Premium, but hierarchies can only be created and maintained in Premium. Once linked to a hierarchy, proposals can only be modified in Premium. Unlink the child proposals to allow Lite users access to modify, and then recreate the link and to the hierarchy.

Linking Child Proposals

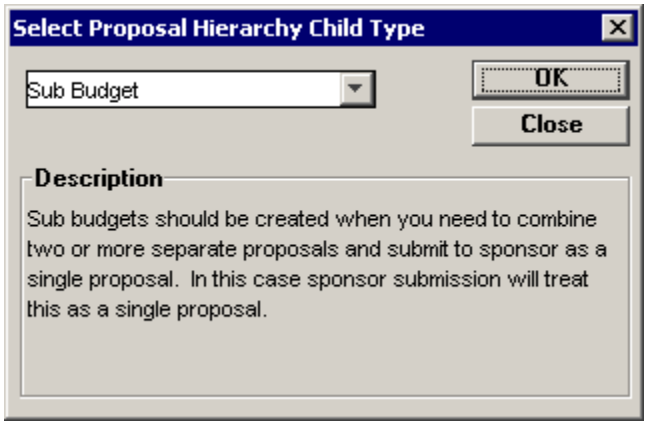
Note: The parent proposal can accommodate a child proposal's *end date* if it is later than the parent proposal's end date. The end date for the parent proposal is extended in this case. However, a child proposal *cannot* have a start date that is *earlier* than the parent proposal's start date. In this case, a new hierarchy should be constructed from proposal with the earliest required start date.

A child proposal can be linked to the hierarchy either from the child itself or from the parent. Neither method is preferred over the other.

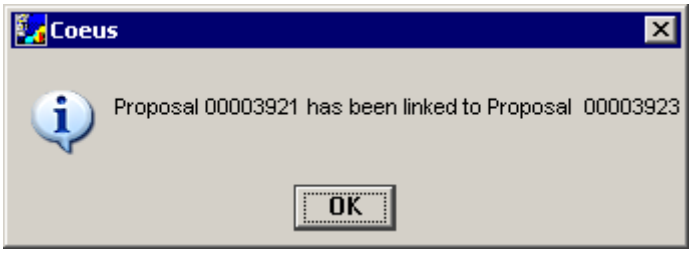
The **Budget Status** of the parent budget must be set to **Incomplete**, the default status, to enable linking a child proposal to a hierarchy.

Linking from the Child

1. Open the proposal you want to link to the hierarchy.
2. Select **Edit > Link to Hierarchy**. If the child proposal does not have a budget version marked **Final**, the message shown on page *98* displays. Click **OK** to continue or **Cancel** to discontinue linking.
3. The SELECT PROPOSAL HIERARCHY CHILD TYPE window opens.

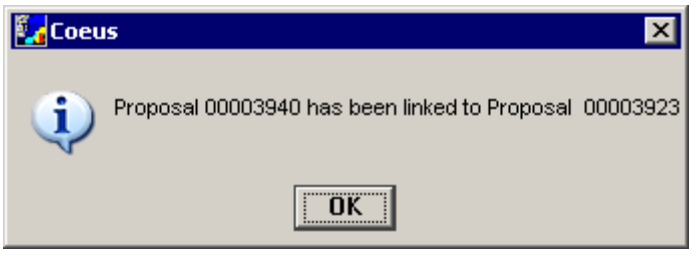


4. Select **Sub Budget** or **Sub Project** from the drop-down list (see *Which to Select, Sub Budget or Sub Project?*, page 100). Click **OK**. The DEVELOPMENT PROPOSAL SEARCH window opens.
5. Enter the parent proposal number and click **Find**.
6. The DEVELOPMENT PROPOSAL SEARCH RESULT tab displays the result of your search. Select the parent proposal and click **OK**.
7. The child proposal is linked to the hierarchy. This message displays; click **OK**.



Linking from the Parent

1. Open the parent proposal.
2. Select **Edit > Link Child Proposal**. The SELECT PROPOSAL HIERARCHY CHILD TYPE window opens (see above). Select **Sub Budget** or **Sub Project** and click **OK**.
3. The DEVELOPMENT PROPOSAL SEARCH window opens. Enter the number of the proposal you want to link to the hierarchy and click **Find**.
4. The DEVELOPMENT PROPOSAL SEARCH RESULT tab displays the result of your search. Select the proposal you want to link to the hierarchy and click **OK**.
5. If the child proposal does not have a budget version marked **Final**, the message shown on page *98* displays. Click **OK** to continue. (Click **Cancel** to discontinue linking.)
6. The child proposal is linked to the hierarchy. This message displays.



7. Click **OK**.
8. If you have more child proposals to link, go back to step *2*.

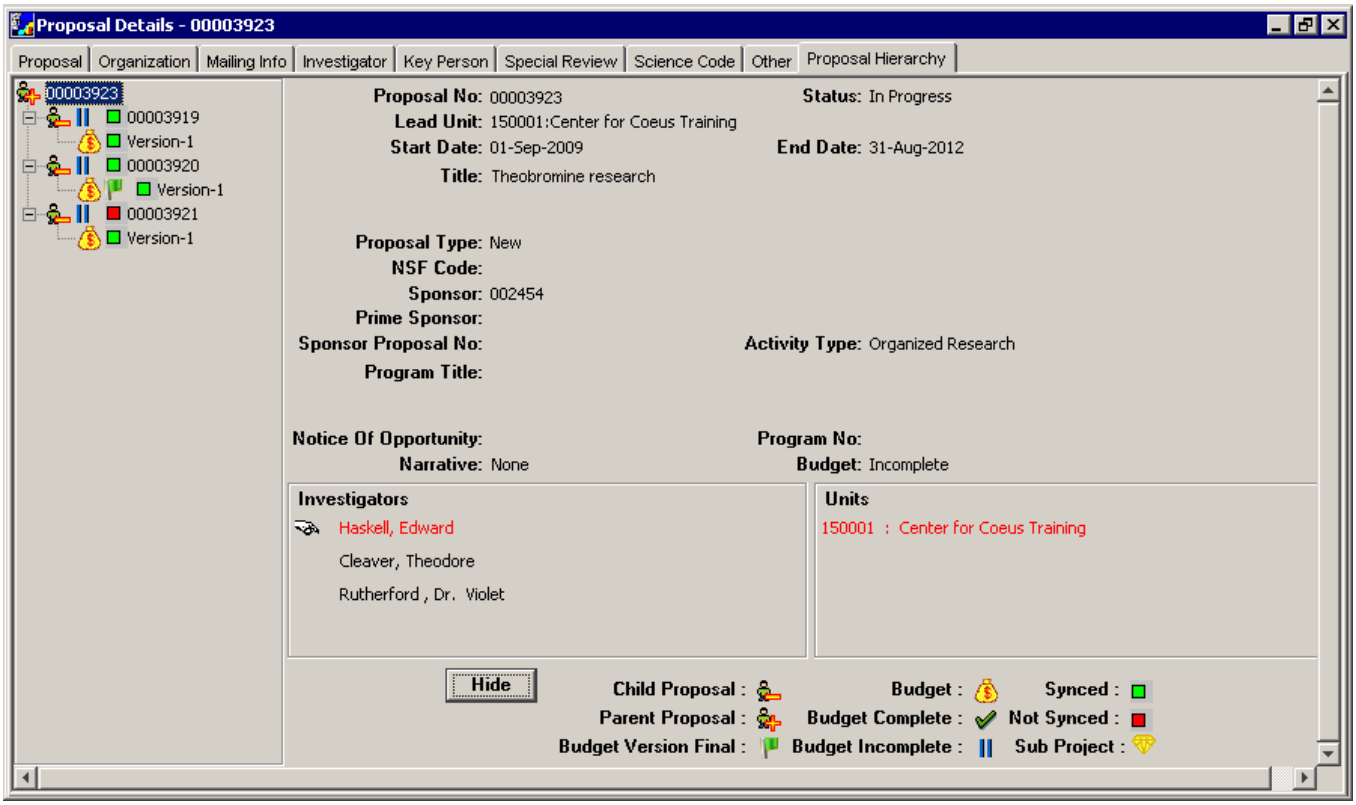
Which to Select, Sub Budget or Sub Project?

Note: Typically only one of these types, Sub Budget or Sub Project, is selected for all child proposals in a hierarchy. Refer to the sponsor instructions for the type to use.

Select **Sub Budget** to combine two or more separate proposals to submit as a single proposal. The sponsor receives one combined proposal. Budget data is copied as-is from the child to the parent. That is, all line items and calculated amounts are copied from the child's budget to the parent's budget.

Select **Sub Project** to include a subproject in a proposal. The sponsor receives a master proposal with attached subprojects. Details from the child budget are consolidated in the parent budget. Each period of the parent budget contains two line items for each child, one for all direct costs and the other for all indirect costs.

Proposal Hierarchy Tab



The PROPOSAL HIERARCHY tab consists of two panes. The left pane contains a tree that graphically shows all proposals in the hierarchy, and the right pane contains information about the selected proposal. This tab is the same in all proposals in the hierarchy.

Click **Show Legend** at the bottom of the PROPOSAL HIERARCHY tab to see the icons used in the tree.

Click **Hide** (shown above) to collapse the legend.

In the tree click ⊞ (expand) icon next to a child proposal to display all budget versions and the one marked final .

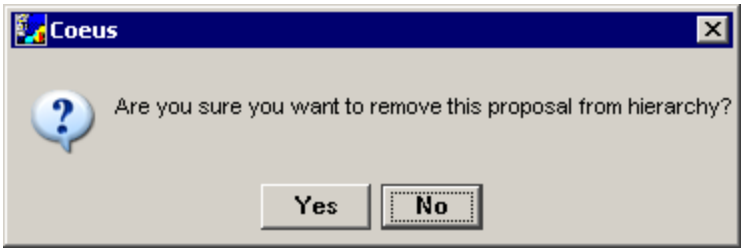
Click ⊟ to collapse the tree.

Click a proposal number to display details of that proposal in the right pane.

Removing a Proposal from a Hierarchy

The **Budget Status** of the parent budget must be set to **Incomplete**, the default status, to enable removal of a child proposal from a hierarchy.

1. Open the child proposal you want to remove in modify mode.
2. Select **Edit > Remove from Hierarchy**. This message displays.



3. Click **Yes**.
4. Click the **Close** icon or select **File > Close**.

Note: If you remove all child proposals from a hierarchy, the parent proposal becomes inaccessible. Attempting to open it may cause this message to display: “Unknown Error, Contact Coeus Administrator.”

Syncing the Proposals

Synchronizing the hierarchy updates the parent proposal with information from the child proposals. See *Entering Data and Syncing the Proposals*, below, for information on what is synchronized.

Syncing from the Parent Proposal

1. Open the parent proposal in modify mode.
2. Click the **Sync All** icon or select **Edit > Sync All**.

Syncing from a Child Proposal

1. Open the child proposal in modify mode.
2. Click the **Sync To Parent** icon or select **Edit > Sync To Parent**.

Entering Data and Syncing Hierarchy Proposals

Data Location	Enter Data In	Parent Updated When	
		Creating Parent	Linking or Syncing
Proposal tab	Either parent or child	Yes	No
Organization tab	Parent	Yes	No
Mailing Info tab	Parent	Yes	No
Investigator tab: Investigator & Unit	Child	Yes	Yes
Investigator tab: % Effort field, PI & Faculty checkboxes	Either parent or child	Yes	No
Investigator tab: Certification	Parent to submit proposal; optional in child.	No	No
Key Person tab: Name, Role	Child	Yes	Yes
Key Person tab: %Effort field, Faculty checkbox	Either parent or child	Yes	Yes
Special Review tab	Either parent or child	Yes	Yes
Science Code tab	Child	Yes	Yes
Other tab	Either parent or child	No	No
Yes/No Questions	Parent to submit proposal; optional in child.	No	No
Abstracts	Parent to submit proposal; optional in child.	No	No
Notepad	Either parent or child	No	No

Data Location	Enter Data In	Parent Updated When	
		Creating Parent	Linking or Syncing
Proposal Persons window: Person Details, Person Attachments, Degree	Parent if the person is in more than one child proposal. Child if the person is in this child proposal only.	Yes	Yes[1]
Proposal Persons window: Person Details, Person Attachments, Degree	Parent if the person is in more than one child proposal. Child if the person is in this child proposal only.	Yes	Yes[2]
Narratives	Parent if the **Narrative Type** is used in multiple proposals and the type allows only one. Child if the **Narrative Type** is used in only one proposal. The proposal in which the narrative was created for a **Narrative Type** that allows multiples.	Yes	Yes[3]
Grants.gov	Parent	Yes[4]	No
Main Budget screen	Child (typically)	Yes	Yes
Budget details	Parent for Total Cost Limit, Residual Funds, and UR Rate Type; child for other data.	Yes	Yes
Budget Status field	Mark all Complete. Child proposals must be marked Complete before the parent is marked Complete.	No	No
Modular Budget	Parent	No	No
Budget Justification	Either parent or child	No	No
Subaward Budget	Child	Yes	Yes

Notes

- The parent proposal budget can be marked **Complete** only after all child proposal budgets are marked **Complete**.
- After a parent proposal budget is marked **Complete**, child proposals cannot be linked to or removed from the hierarchy.
- The parent proposal can have a modular budget.
- The status of a child proposal is updated if the parent proposal is rejected, making the child proposal editable.

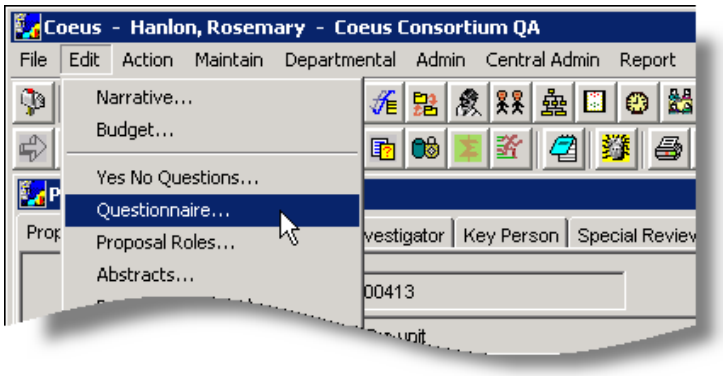
[1] If the same person is named in multiple proposals, the data is updated in the parent from the first child linked to the hierarchy or the first child synced.
[2] If the same person is named in multiple proposals, the data is updated in the parent from the first child linked to the hierarchy or the first child synced.
[3] When a **Narrative Type** that does not support multiples is used in multiple proposals, the data is updated in the parent from the first child linked to the hierarchy or the first child synced.
[4] The **CFDA No.** and **Program No.** fields are updated in the parent, but the Grants.gov logo does not display in the parent. Connect to Grants.gov from the parent proposal.

Several tasks must be completed before the proposal is ready to be submitted for approval.Follow the instructions in this chapter to perform these functions.

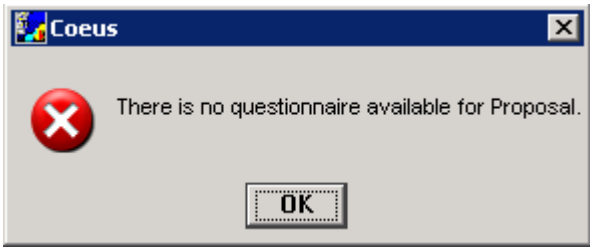
Answering Questionnaires

Answering the Questionnaire is required in order to complete, validate and submit your proposal for approval routing. Questionnaires can be designated as mandatory or optional. The UC Policy Questions questionnaire is required for all proposals submitted by UC.

To answer the Questionnaire, from the PROPOSAL DETAILS window use the menu path **Edit > Questionnaire**….

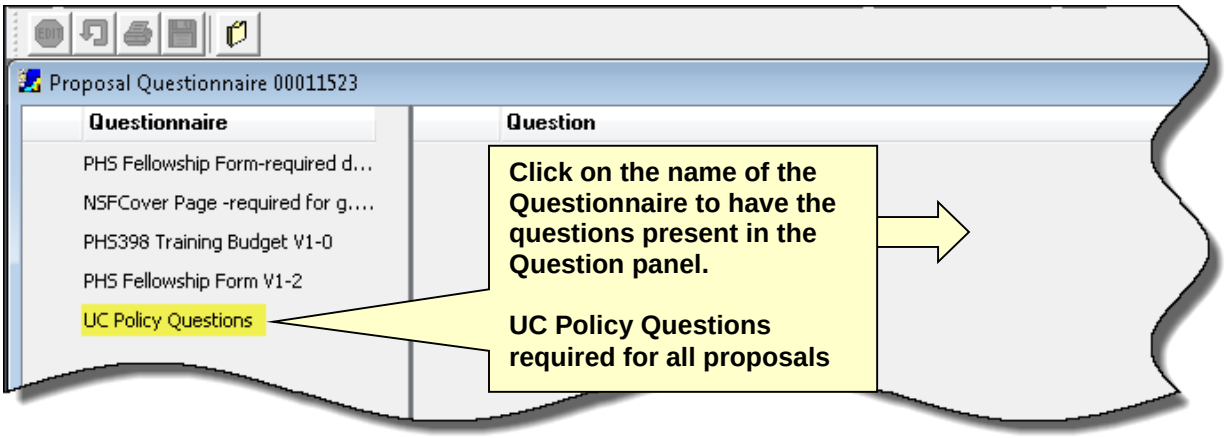


1. If no questionnaires are applicable, a notification box will appear to confirm that there are none available to be answered. Since the UC questionnaire is required for all proposals, please contact coeus@uc.edu if you see this notification.

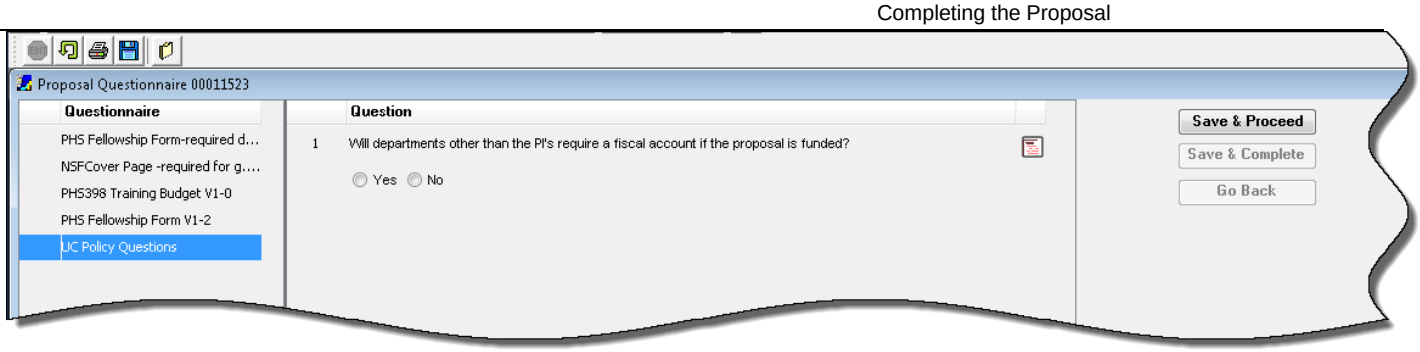


The proposal may not trigger any conditions that invoke additional questionnaires. The Grants.gov form supporting questionnaires may require that a specified form be present in the linked Grants.gov sponsor opportunity.

2. The PROPOSAL QUESTIONNAIRE window will open with at least one named questionnaire available to select and answer. Note: the 2nd tier icons will not activate until a questionnaire is selected.



3. Click on a named questionnaire in the left **Questionnaire** panel to select it. Once selected, the 2nd tier icons will become active, the first question(s) will appear in the central **Question** panel, and the **Save & Proceed** button will activate. The **Go Back** buttons will only activate after Save & Proceed is used and the next question(s) are presented.



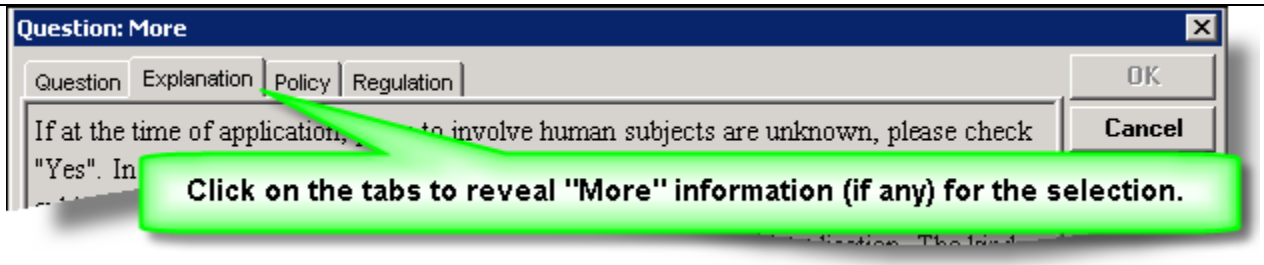
Navigating a Questionnaire

While answering a questionnaire, the following actions can be taken to review or revise your answers.

Save	**Save** if there is only one panel of questions, the Save button will appear.
Save & Proceed	**Save & Proceed** button will appear if there are additional questions to answer after this panel.
NEW Save & Complete	**Save & Complete** button will appear when modifying a previously completed Questionnaire. The button will *not* appear if there are additional questions to answer due to a changed response.
Go Back	**Go Back** button allows a user to scroll back to the last question answered.
	Modify (edit) to open a previously completed questionnaire. Or use menu path Edit >Modify from an open PROPOSAL QUESTIONNAIRE window.
	Start Over deletes all prior answers and returns the user to the beginning of the Questionnaire. Or use menu path Edit>Start Over from an open PROPOSAL QUESTIONNAIRE window. Start over is active while a questionnaire is being answered. To start over a *completed* questionnaire, with the questionnaire name selected, click the Edit icon, and then click the Start Over icon. (Alternatively, use the same options under the Edit menu path.)
	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).
	Save will save answered questions and allow the user to leave the questionnaire without completing it. When the user returns to that questionnaire, it will open at the last saved question panel.
	Close will close the QUESTIONNAIRE FOR PROPOSAL window. Alternatively, use the interior window close (x) button at the far-right of the QUESTIONNAIRE FOR PROPOSAL (RECORD NUMBER) title bar.

To complete a questionnaire:

1. Answer each question presented in the **Questions** panel.
   Questions may need to be answered by:
   - Clicking a radial button to respond to Yes/No, or Yes/No/NA
   - Entering a Date in a 10-character format e.g. MM/DD/YYYY (count includes slashes)
   - Entering text
   - Entering a number
   - Selecting an item from a predefined list
2. The **"More**" icon may contain additional information to help you understand and answer the question. Click each tab-header to reveal information, if any, and then click **Cancel** to close this window.



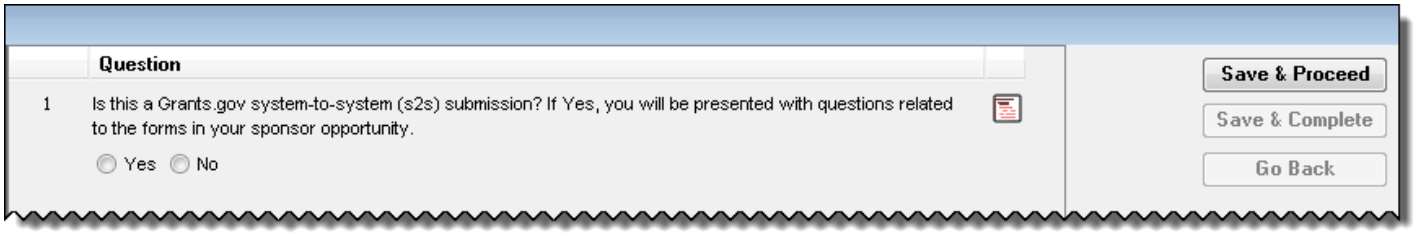
3. Once the questions in view are answered, click **Save** or **Save & Proceed** to present the next question(s).
4. If you did not answer a question, or did not conform to the answer requirements, a notification window will open identifying the question to complete.
5. With all applicable questions 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

NEW 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

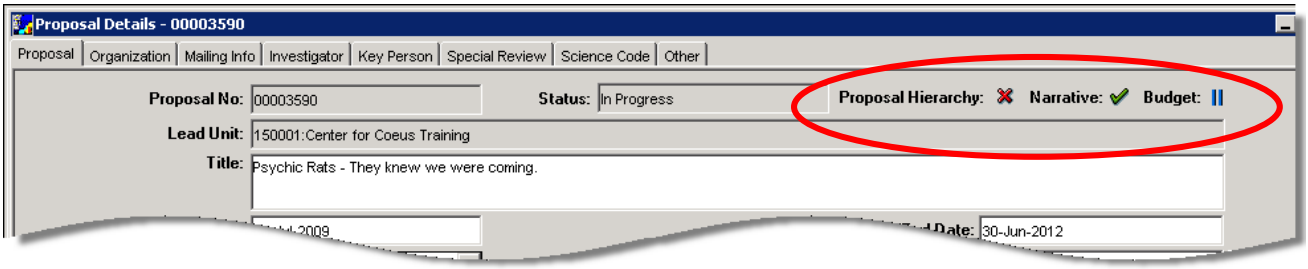
The new Smart Questionnaire requires an opening question, but a “No” answer will generate required questions.



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.

Checking the Status of the Narrative and Budget

Status of both the narrative and budget must display as complete before you can route the proposal for approval. These statuses are displayed on the PROPOSAL tab of the PROPOSAL DETAILS screen (circled below).



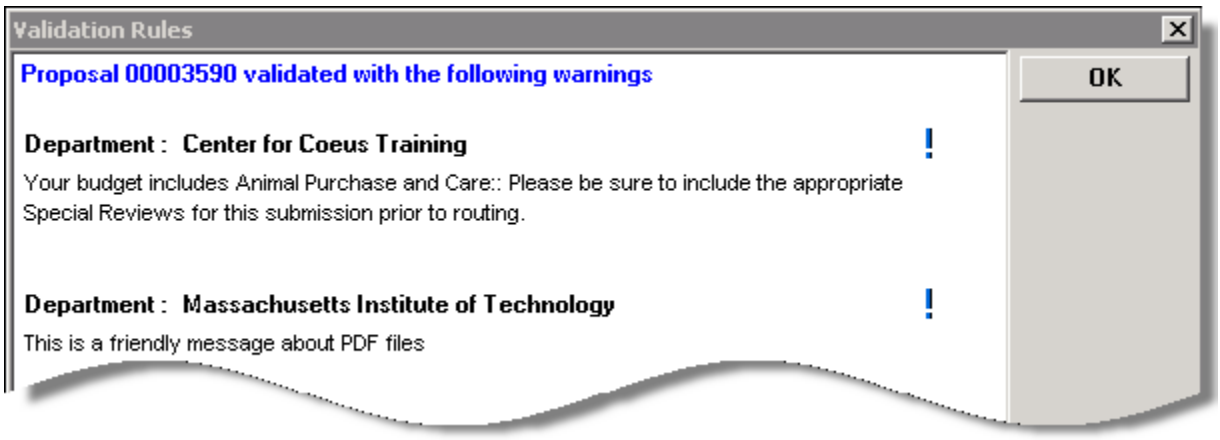
Status	Meaning for Narrative	Meaning for Budget
Complete ✔	At least one narrative document has been uploaded, and all narrative documents have been marked **Complete**.	One version of the budget has been marked **Final**, and that version is designated **Complete**.
In Progress ‖	Narratives exist for this proposal. Open the NARRATIVE tab and check that all uploaded documents are marked **Complete**.	At least one version of the budget has been created, but it is not designated **Final** and **Complete**.
Not Started ✖	No modules have been uploaded to the NARRATIVE window.	No budget has been created.

To change the status of…	from…	to…	do this…
Budget	✖	✔	Create a budget and designate it as both **Final** and **Complete** (see Finalizing the Budget, page 84).
Budget	‖	✔	Designate a version of the budget as **Final** and **Complete** (see Finalizing the Budget, page 84).
Narrative	✖	✔	Upload narrative documents and mark all as **Complete** (see Adding a Narrative Module, page 91).
Narrative	‖	✔	Check that all narrative documents have been uploaded, are up-to-date, and have been marked **Complete** (see Adding a Narrative Module, page 91).

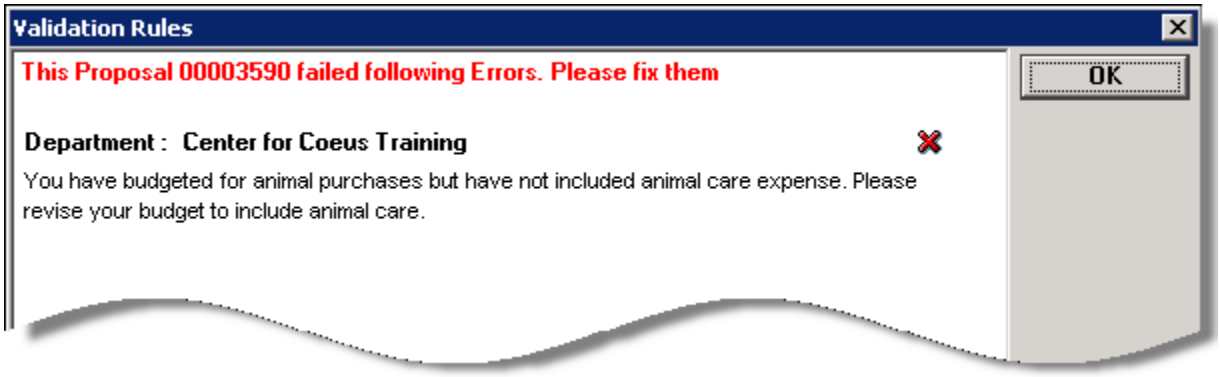
Validating the Proposal with Coeus

The Coeus validation checks for completion of Institute requirements and certain sponsor requirements. Most of these validations are created to support UC business practices and warn of missing elements.

1. Select **Action > Validation Checks**.
2. The Institute validation check runs and opens the VALIDATION RULES window, which lists items that must be addressed before the proposal can be submitted. This validation will include the Budget Validations as well.
3. A *Validated* notification may still provide a notice for you to review and revise your application prior to submitting to route for approval.
    a. Review the notice, and then click **OK** to close the VALIDATION RULES window.
    b. Confirm that your proposal complies with the Validation notice, and then proceed with submission for approval, if you are ready.



4. A *failed* validation means the proposal cannot be submitted for approval routing until the situation causing the failure is remedied.
    a. Review the notice, and then click **OK** to close the VALIDATION RULES window.
    b. Make the necessary corrections until the proposal passes the validation rule.



Validating the Proposal with Grants.gov

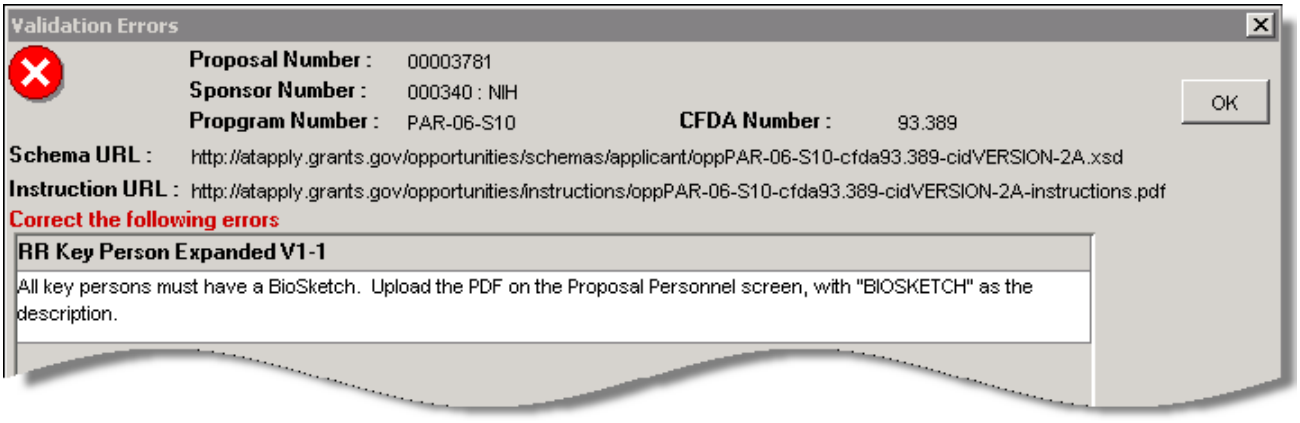
If your proposal is eligible for electronic system-to-system (s2s) submission by Coeus to Grants.gov, you must perform the validation check on the GRANTS.GOV SUBMISSIONS DETAILS screen before it can be considered complete. This validation determines if all elements required by the sponsor for this announcement have been completed.

Note: Complete all proposal preparation and narrative uploads before performing this validation.

1. From the PROPOSAL DETAILS screen, select **Action > Grants.gov**. The GRANTS GOV SUBMISSION DETAILS window opens.

2. Open the OPPORTUNITY tab and click **Validate**. The result is one of these:

- The message “Validation Successful” displays. Close the GRANTS GOV SUBMISSION DETAILS window and continue preparing the proposal.
- A list of items to correct is displayed. Review this list, close the GRANTS GOV SUBMISSION DETAILS window, make the appropriate corrections, and repeat the validation.



Do not attempt to submit the proposal for approval routing until all items noted in the validation report have been corrected and the validation is successful.

Creating a PDF of the Proposal

Grants.gov Submission

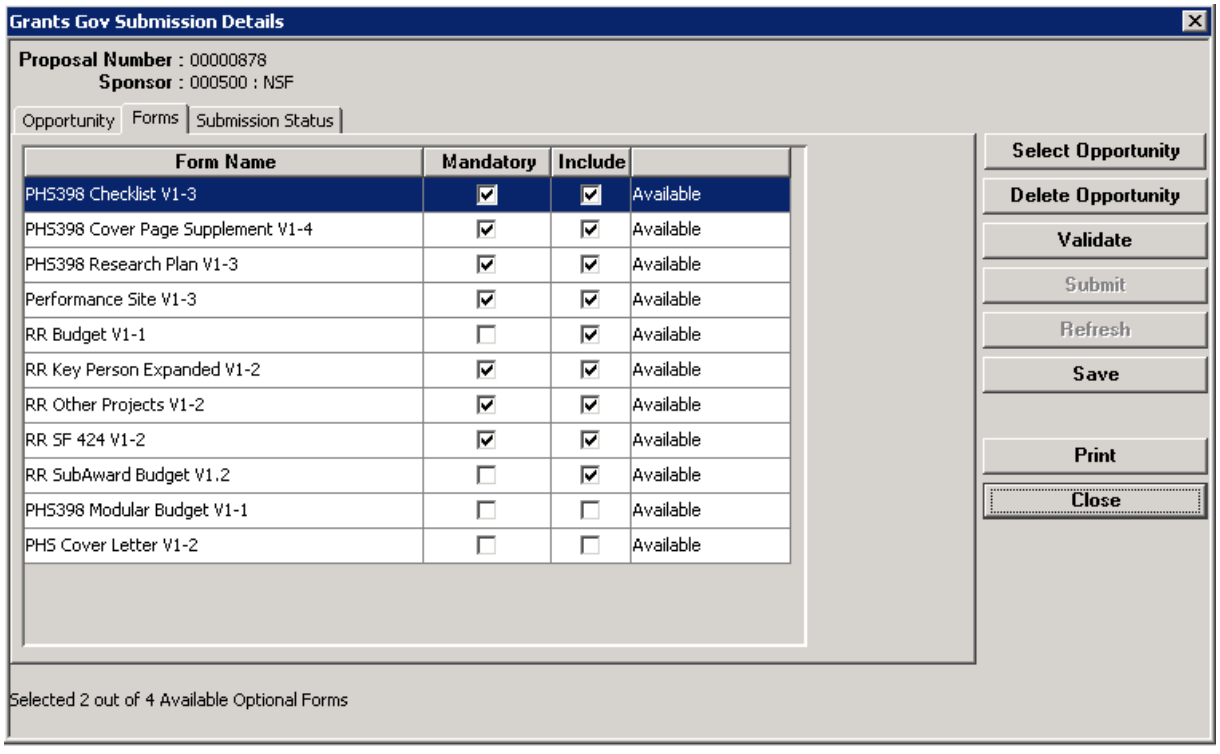
This feature enables you to create a PDF file of the proposal for several purposes:

- Confirm the form set has been filled in as expected.
- Confirm that all relevant or required files are attached.
- Enable users to preview the contents of the electronic submission.
- Enable you or the PI to save a PDF version of the proposal for off-line access.

Note: The forms appear in alphabetical order by form name, followed by the PDF attachments. (Other non-PDF attachments will NOT preview in this method).

The Coeus Print/Preview function provides the end-user with a method to preview and confirm that the maintained data and narratives are present and conform to the sponsor & opportunity's submission requirements. The order in which the forms and uploads are presented is a visual representation of the data-stream that will be transmitted to the sponsor. The Coeus view is in no way meant to represent an "assembled grant image." Several sponsors (NIH and NSF) receiving electronic submissions separate narratives from the forms they were submitted with and completely discard some forms entirely (checklists) and reassemble the transmitted data into their own "grant image." There are no known Grants.gov or sponsor requirements for a standard "print" view of the electronic submission process.

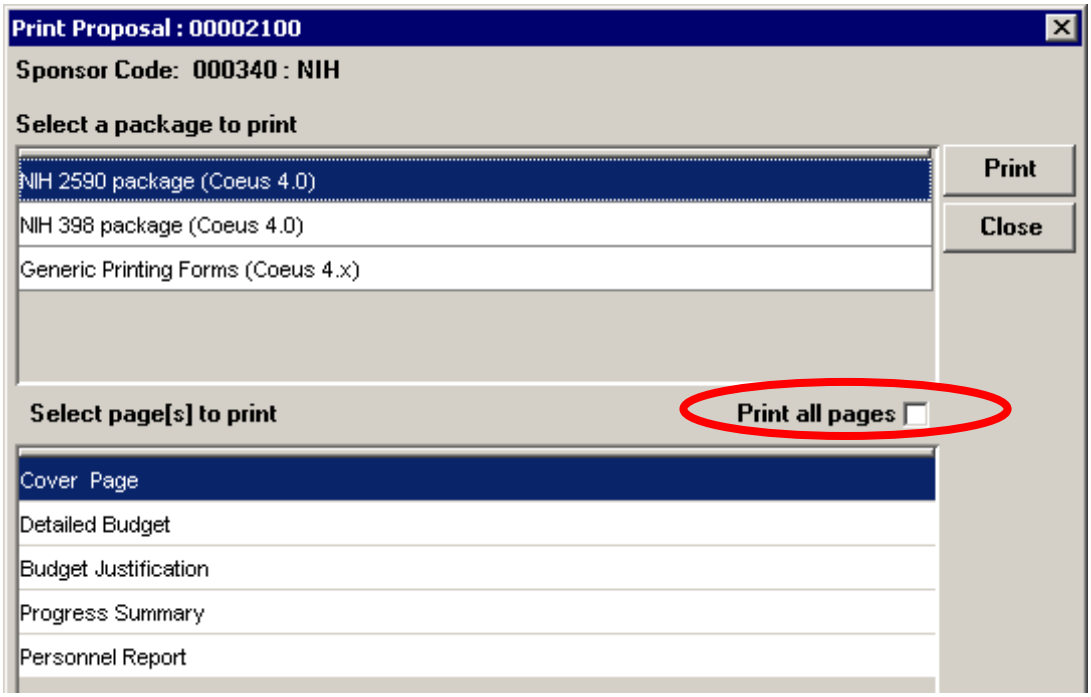
1. From the PROPOSAL DETAILS screen, select **Action > Grants.gov**. The GRANTS GOV SUBMISSION DETAILS window opens.
2. Open the Forms tab.



3. Multi-Select all mandatory and optional forms for your submission with **Ctrl**+click (Mac users **Command**+click).
4. Click the **Print** button at the right of the window. A browser window opens with a compiled PDF file of the proposal's forms.
5. Click the PDF **Print** button to print or the PDF **Save** button to save the PDF file if desired.

Paper Submission

1. Click the **Print** icon or select **File > Print**. The PRINT PROPOSAL window opens.



2. Review the sponsor instructions for the forms required. If more than one print package is listed in the top part of the screen, click to select the correct package. In the bottom part of the screen select the **Print all pages** checkbox (circled above) or select individual forms using **Ctrl**+click (Mac users **Command**+click).
3. Click **Print**. A browser window opens with a PDF file of the forms.
4. Click the PDF **Print** button in the browser to print the file or click the PDF **Save** button to save the file.

About the Approval Process

The completed proposal must be submitted to a pre-determined set of approvers before it can be submitted to the sponsor. Who those approvers are is determined by the investigators' departments (units).

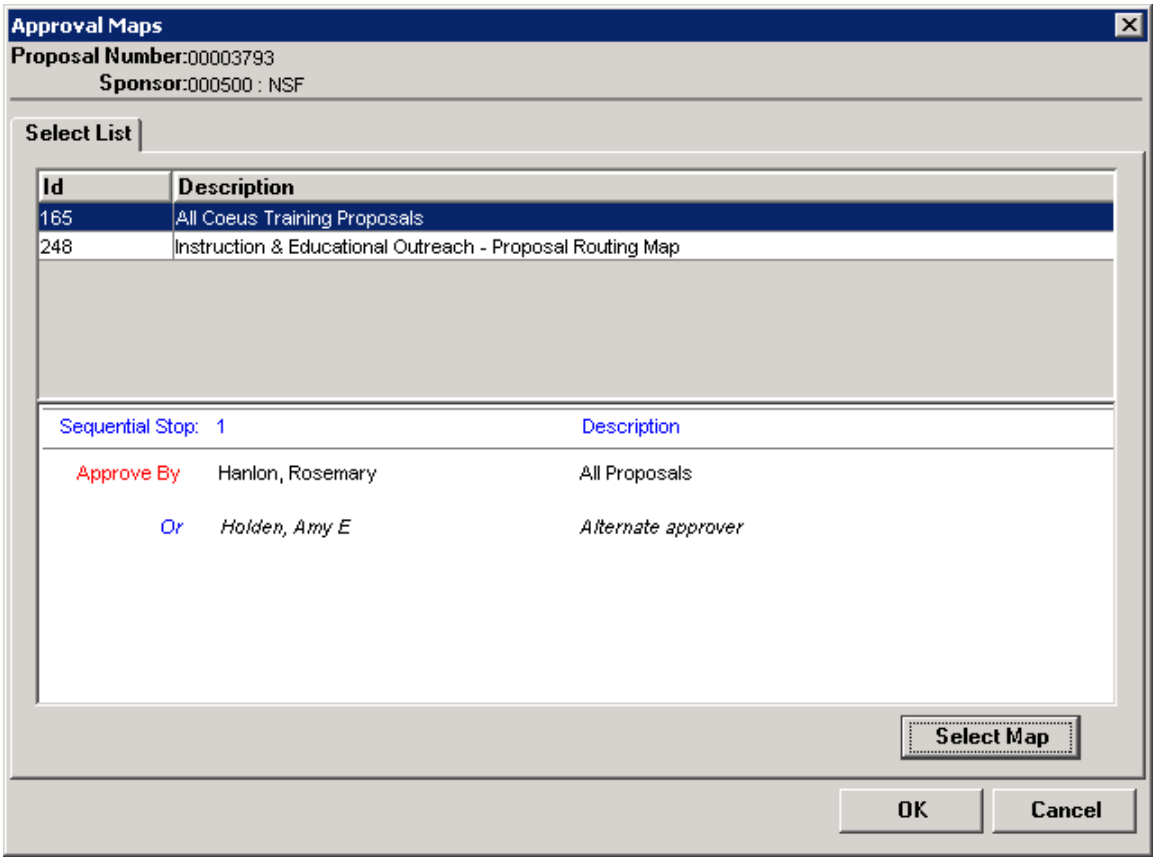
Routing the Proposal

You ***must*** perform all tasks in the previous chapter before submitting the proposal for approval. If you have not completed them, return to *Completing the Proposal*, page 104.

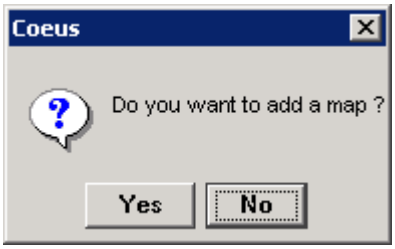
Select an Additional Indirect Approval Map

You may have more than one approval routing map maintained for your unit to choose from for your proposal. If more than one map is available, you can view and select a routing map by taking the following steps:

1. From the PROPOSAL DETAILS module, from the **Action** menu **>Select Approval Map** or click the **Select Proposal Routing** icon . The APPROVAL MAPS window will open.

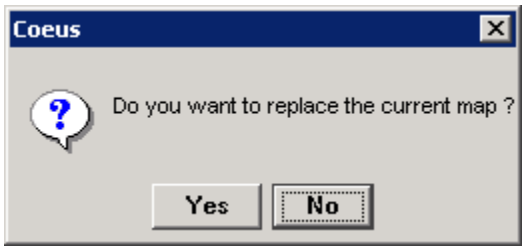


2. Click on a map **Description** line to view the approvers in that map.



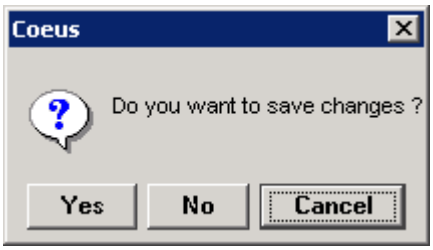
- With a map highlighted, click on the **Select Map** button.
- Click the **Yes** to apply the selected Map or **No** to cancel the action.

- If you've previously selected a map and use the **Select Map** button again, you'll be offered the chance to replace the current map.
- Click the **Yes** to apply the replace the Map or **No** to cancel the action



3. Click **OK** to apply the selected map.

4. Or click **Cancel.**
   - Click **Yes** to save the last selection
   - Click **No** to return to the Approval Map window
   - Click **Cancel** to close the prompt and the Approval Map window with no action.

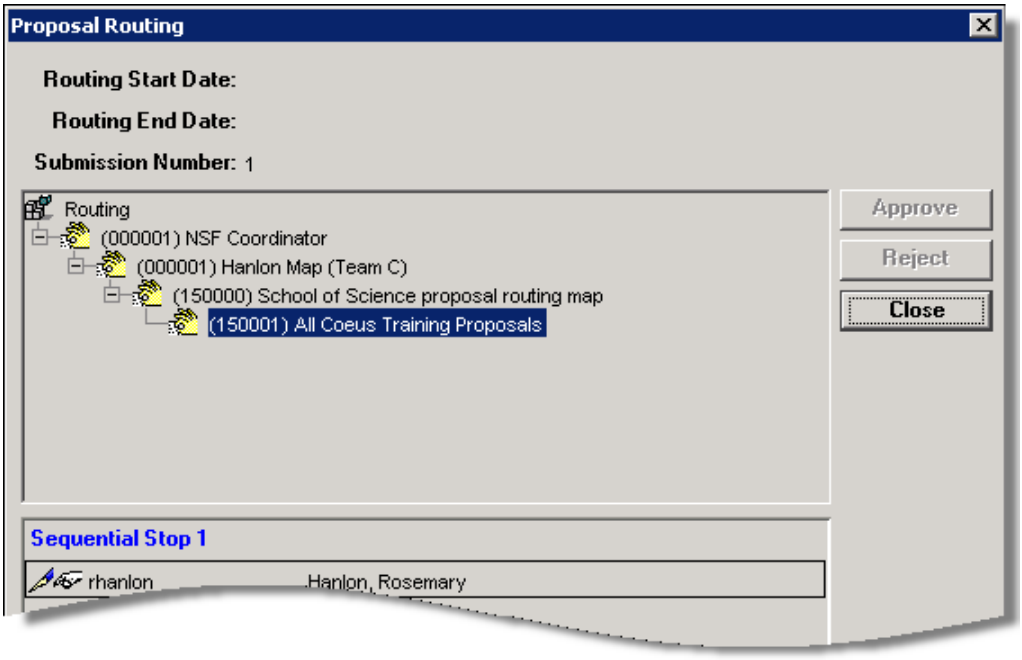


Show Routing Map

To view the approval routing map in advance of submitting for approval routing, take the following steps:

1. Select **Action > Show Routing**. The PROPOSAL ROUTING window will open.

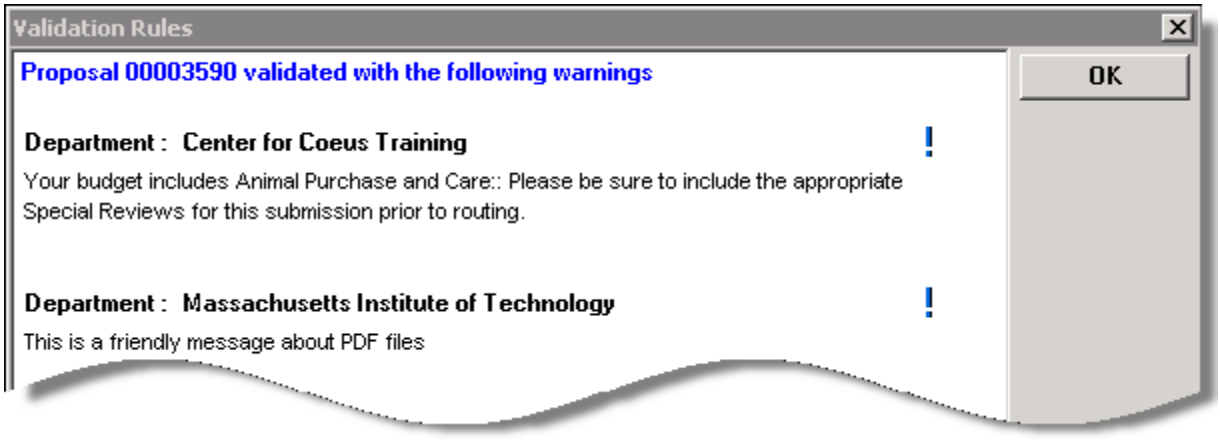
- Select each level in the displayed Routing Hierarchy to view the approvers maintained at each stop.
- Select **Close** to close the window.



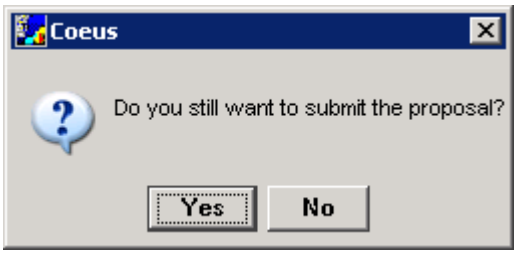
Submit a proposal for approval routing:

Follow these steps to submit a proposal that is ready to be submitted for approval:

1. Select **Action > Submit for Approval…**.or use the **Submit Proposal for approval** icon
2. Coeus Validations will be performed, regardless of whether you've manually validated the proposal. Click **OK** to close the VALIDATION RULES window.

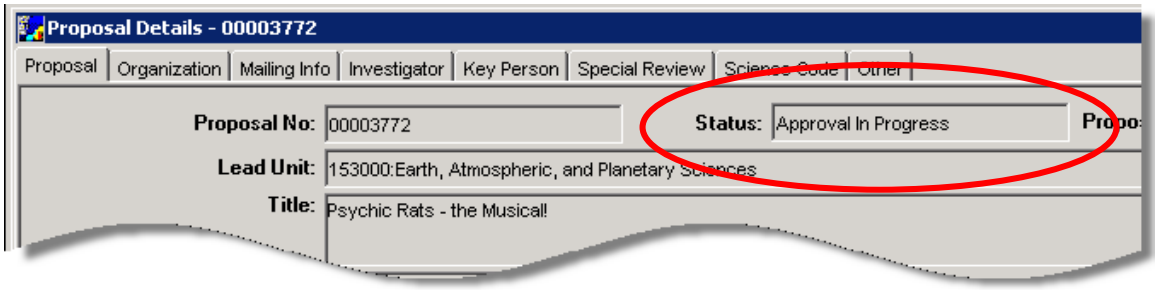


3. Select **Yes** to submit the proposal. Select **No** to close the prompt and cancel submittal until you've performed the Validation prompts or until you are ready.



4. If you selected **Yes**, a confirmation message opens confirming successful submittal.

5. Click **OK** to close the prompt. The PROPOSAL ROUTING window opens for information only.
6. Click **Close** in the PROPOSAL ROUTING window.
7. The proposal status is set to Approval in Progress.



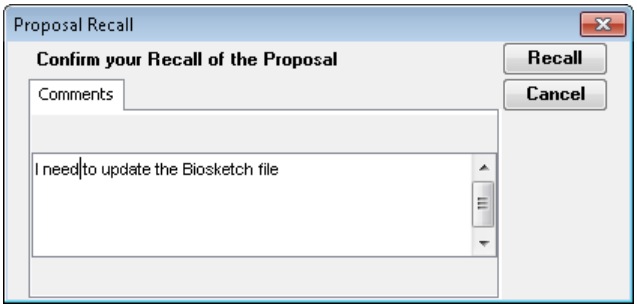
Recall an Approval in Progress Proposal, or: Oops! I didn't mean to submit! :

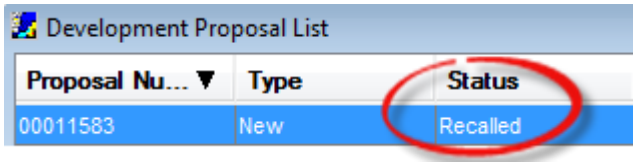
NEW 4.5.1 now allows the Proposal Aggregator to "Recall" a proposal that is routing for approval. This feature was added as an alternative to requesting the proposal be rejected. The feature was designed to allow the aggregator to remove a proposal from routing/approval because of a mistake, missing 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. Follow menu-path **Action > Approval/Rejection**.

- In the **PROPOSAL ROUTING** window, locate and click on the current approval stop.
- **Click Recall**; type in the reason for recalling the proposal in the confirmation window and then **click Recall**.
- **Click OK** in the confirmation window, and again in the successful transaction window.
- The proposal status is changed to **Recalled** and is now completed editable.





What Happens Next

These steps take place after you submit the proposal for approval.

Step 1: Departmental review and approval

Lead unit map:

All stops review and approve

Each Co-Investigator's home unit map:

All stops review and approve

Step 2: SRS review, approval, and submission to sponsor

Grant Administrator review and approval

Reject if a critical required element is missing from special reviews:

Human Subjects protocols verified for correctness, accuracy, and relevance to application.

Animal Use verified for correctness, accuracy, and relevance to application.

Use of Recombinant DNA/Biohazard: confirm YNQ's answered correctly. Dept. responsible for registering/reviewing with Biosafety Program

Radioactive Materials: confirm YNQ's answered correctly. Dept. responsible for registering/reviewing with Radiation Protection Program

Reject if proposal does not conform to the sponsor's instructions and UC requirements.

Submit only if:

All UC and sponsor requirements are met.

Bypass by Request

A request to bypass an approval must be approved by your Authorized Official. The request must verify that no substantive changes have been made that would require supplemental review by the approver being bypassed. The Department, PI, or Aggregator is responsible for alerting the Authorized Official of the need for bypass, and for understanding the nature of substantive change according to their Department, Dean, and Approvers.

Is my Proposal Approved yet? aka Viewing Approval Routing

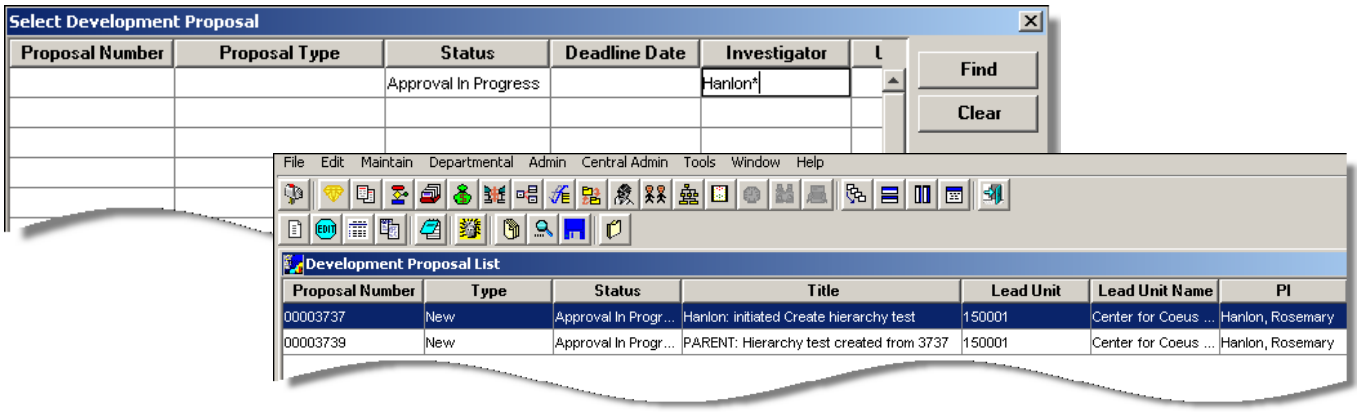
When a proposal is routing for approval, users with view access to the proposal can view the proposal's approval map and see where the proposal has been approved, and what approval routing stops are still to come.

Locate a routing Proposal from Coeus Proposal Development:

Launch Coeus Premium:

- From the **Maintain** menu, select **Proposal Development** or use the 2nd tier Icon:
- Use the **Search** window to locate the proposal.

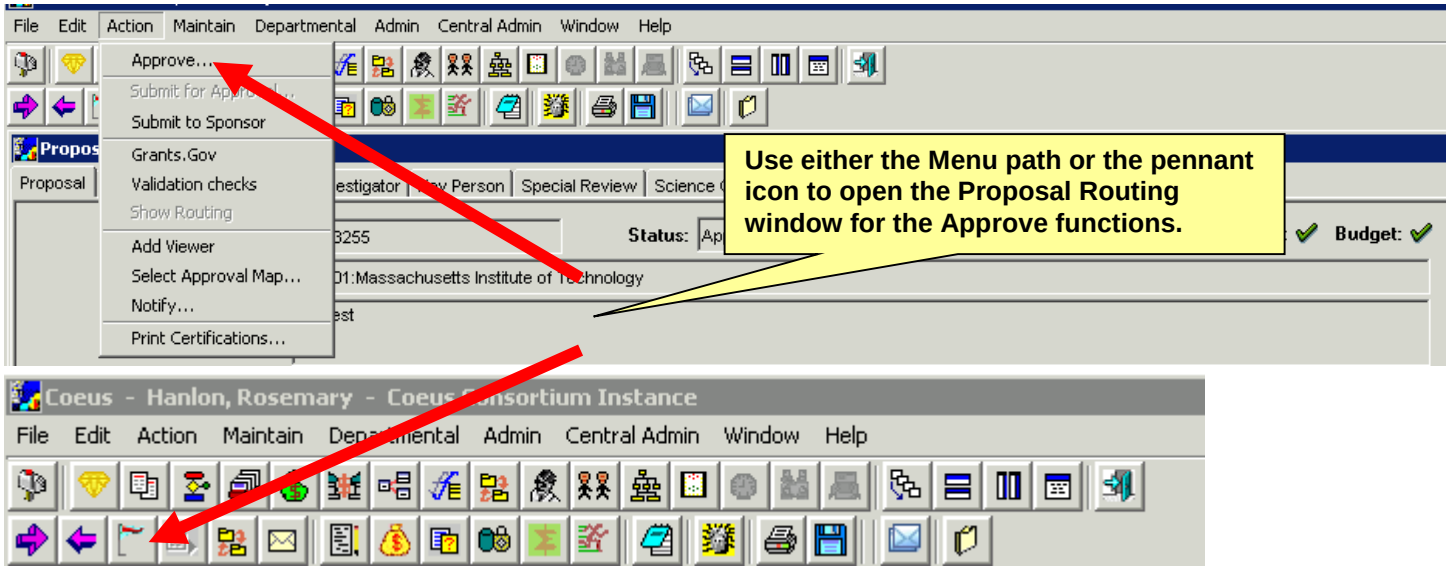
TIP: Limit your search to **Status: Approval in Progress** to only find *routing* proposals. You can further limit the search to one Investigator's proposal to further hone your query results.



- **Double-click** a Proposal from the search results on the Development Proposal List screen.
- *Or* from the **Edit** menu, select **Display Proposal**

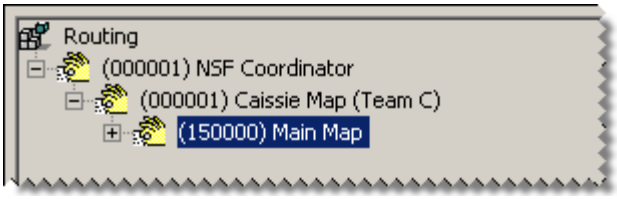
Open the Proposal Routing window from the Coeus Proposal:

- **With a Proposal open in Display mode** (default if proposal is in Approval in Progress status)
  - **Open** the Routing Window
    - **Action** menu**: Approve** or **Use the icon:**



The Proposal Routing Window:

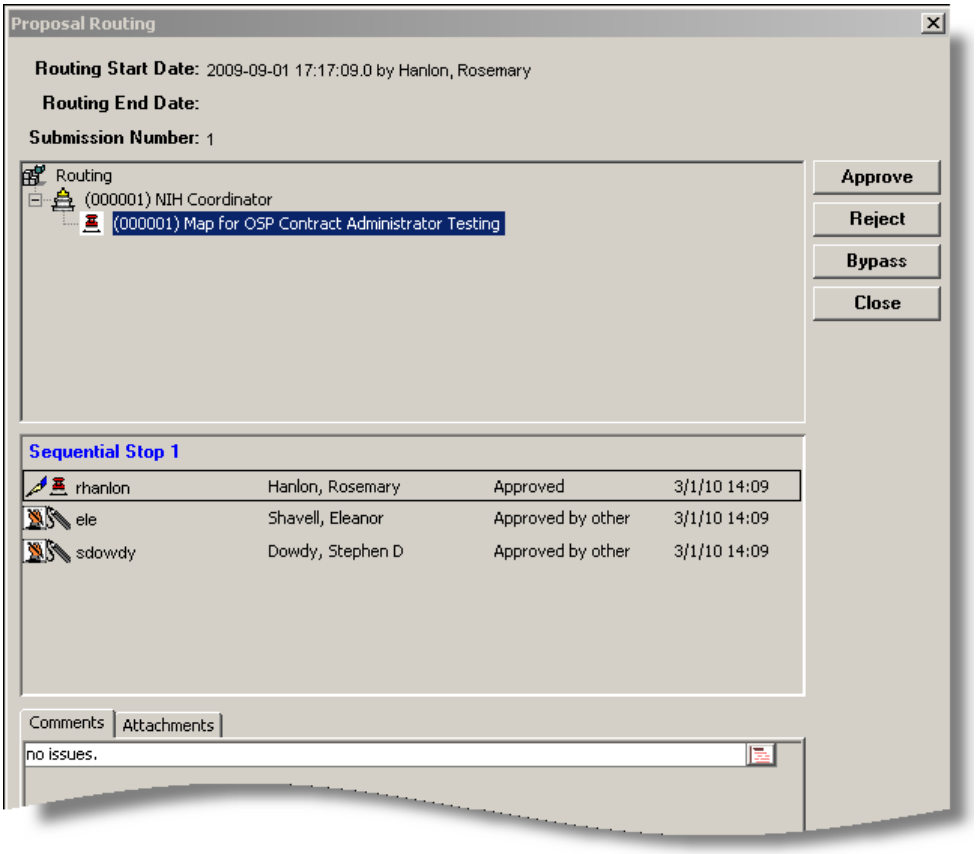
View Routing: The default routing hierarchy view has all routing stops expanded. But you can click the + or - to expand or compress each approval group. Select a level to review the approvers at that stop in the pane below.

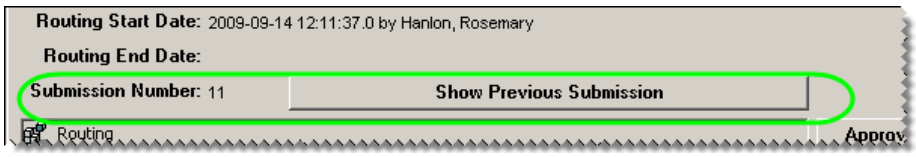


View Comment: Select each approver, If entered, the comment will be displayed in the lower pane Comment tab.

View Attachment: Select each approver, If entered, the Attachment will be displayed in the lower pane Attachments tab.

***Show Previous Submission:** If the proposal has been routed after rejection, a view option button will be presented.

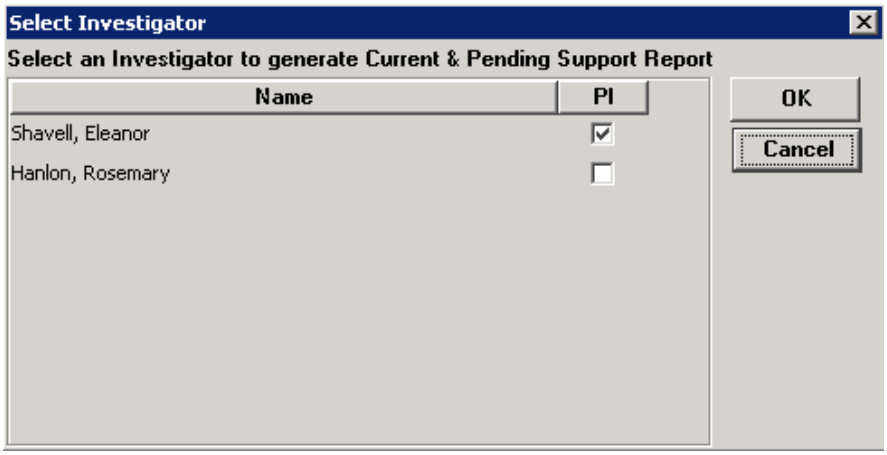




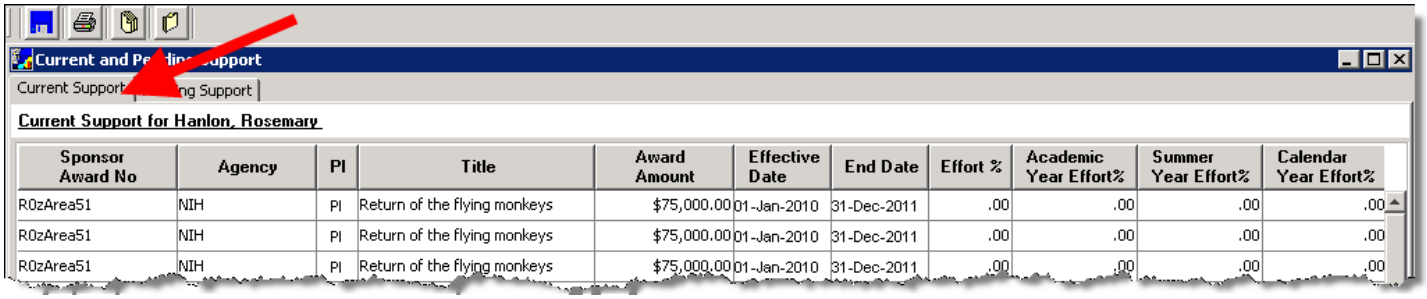
Current and Pending Report Tool:

Use the Current and Pending Report tool while preparing your proposal to query the Award and Institute Proposal modules for records where your Investigators are named.

1. Select **File > Current and Pending Report**… The SELECT AN INVESTIGATOR window will open to generate a Current and Pending Report. The window will list all the investigators from the proposal's Investigator tab. The proposal PI is denoted by the checked box in the PI column.

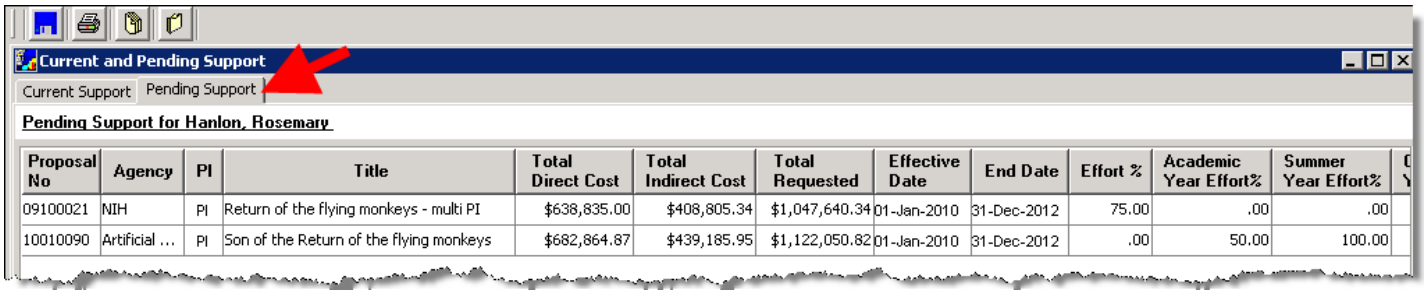


2. Click on an investigator's name to highlight the selection, then click **OK** to generate the report.
3. The CURRENT AND PENDING SUPPORT REPORT window will open.
   a. The first tab lists Current Support: Active awards where the investigator is a named PI or Co-I.
   b. The second tab lists the Pending Support: Pending Institute Proposals where the investigator is a named PI or Co-I.
4. Click on any column header to resort the list.
5. Click on the diskette icon on the 2nd tier toolbar, or use **File > Save** to save the support tab in view. (XLS will save to a format that can be opened and edited in MS Excel.)


Current Support | Pending Support

Current Support for Hanlon, Rosemary

Sponsor Award No	Agency	PI	Title	Award Amount	Effective Date	End Date	Effort %	Academic Year Effort%	Summer Year Effort%	Calendar Year Effort%
R0zArea51	NIH	PI	Return of the flying monkeys	$75,000.00	01-Jan-2010	31-Dec-2011	.00	.00	.00	.00
R0zArea51	NIH	PI	Return of the flying monkeys	$75,000.00	01-Jan-2010	31-Dec-2011	.00	.00	.00	.00
R0zArea51	NIH	PI	Return of the flying monkeys	$75,000.00	01-Jan-2010	31-Dec-2011	.00	.00	.00	.00


Current and Pending Support

Current Support | Pending Support

Pending Support for Hanlon, Rosemary

Proposal No	Agency	PI	Title	Total Direct Cost	Total Indirect Cost	Total Requested	Effective Date	End Date	Effort %	Academic Year Effort%	Summer Year Effort%
09100021	NIH	PI	Return of the flying monkeys - multi PI	$638,835.00	$408,805.34	$1,047,640.34	01-Jan-2010	31-Dec-2012	75.00	.00	.00
10010090	Artificial ...	PI	Son of the Return of the flying monkeys	$682,864.87	$439,185.95	$1,122,050.82	01-Jan-2010	31-Dec-2012	.00	50.00	100.00

Rolodex

You can add a non-employee investigator or key person to your proposal from the Rolodex. If you cannot find the person in a Rolodex search, you can add his or her name to the Rolodex.

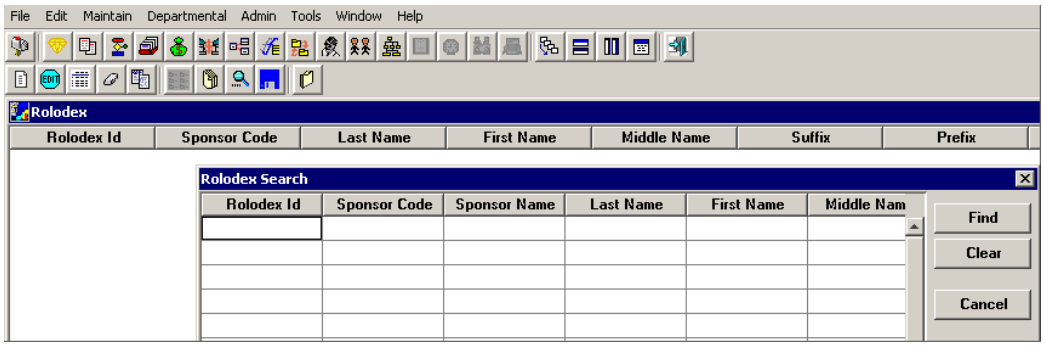
Note: Some users do not have this Rolodex role. If you are unable to add a name to the Rolodex, send email with all required contact information (see below) to **coeus@uc.edu**, and the Rolodex entry will be created for you.

Adding a Name to the Rolodex

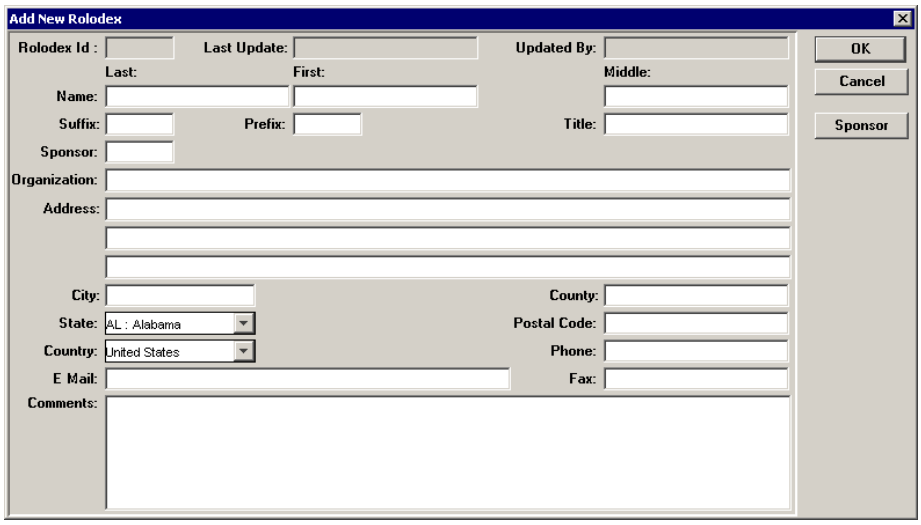
Before you add a name, be sure to search the Rolodex to determine if the name is already in it. This saves you time, and you avoid adding redundant information to the database.

Note: Do not use special characters (such as ü) in any Rolodex entry. Be careful about cutting and pasting into the Rolodex, since you might unintentionally include characters that cause Grants.gov to reject the entire proposal. (See *What "No Special Characters" Means*, page 142.

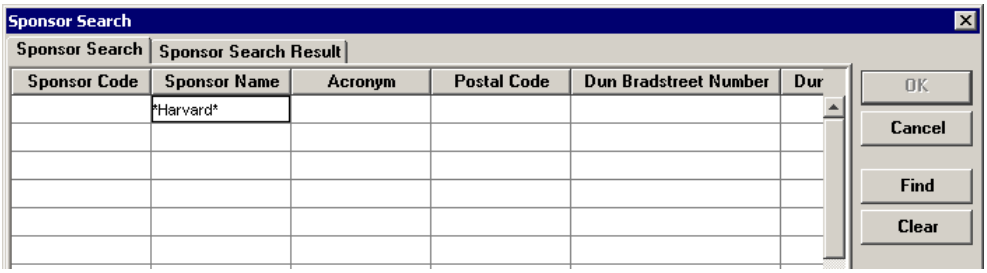
Click the **Maintain Rolodex** icon or select **Maintain > Rolodex…**. The ROLODEX window and ROLODEX SEARCH window open.



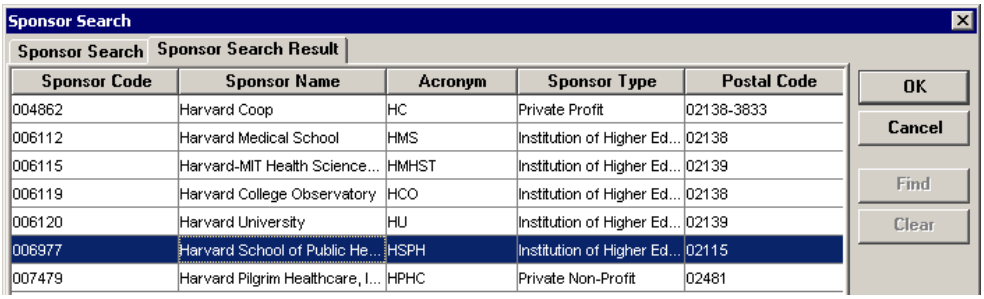
1. Click **Cancel** to close the ROLODEX SEARCH window.
2. Click the **Add** icon or select **Edit > Add**. The ADD NEW ROLODEX window opens.



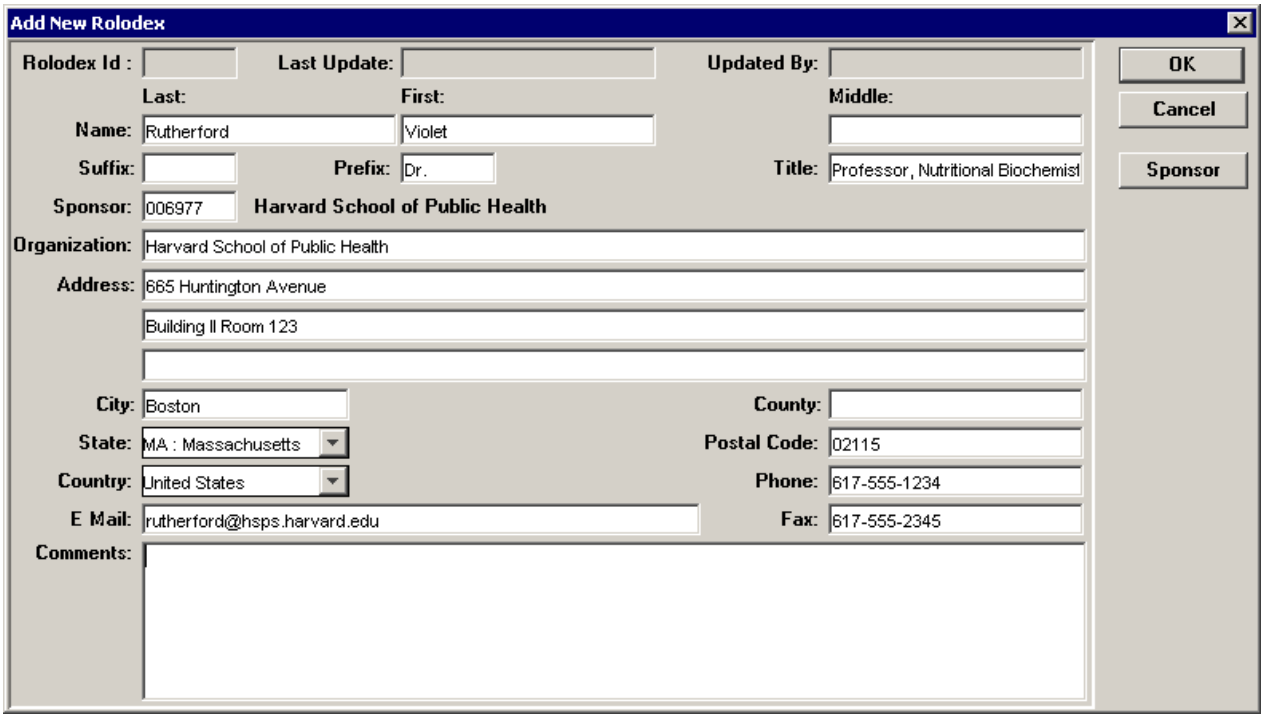
3. Click the **Sponsor** button. The SPONSOR SEARCH window opens.



4. Enter part of the person's organization name, with wildcards, in the **Sponsor Name** field.
5. Click **Find**. The SPONSOR SEARCH RESULT tab displays organization information that matches your search.



6. If the person's organization is listed, select it and click **OK**. Focus returns to the ADD NEW ROLODEX window with organization information filled in.
7. If it is not listed, click **Cancel**. Focus returns to the blank ADD NEW ROLODEX window.
8. Complete the ADD NEW ROLODEX form. At a minimum, these fields are required:
9. **Name** (**Last** and **First**), **Address** (street address on the first line; other lines are optional), **City**, **State**, **Postal Code**, **Country**, **Phone**, and **E-Mail**.



10. Click **OK**. Focus returns to the Rolodex window, which now has a line for this entry.

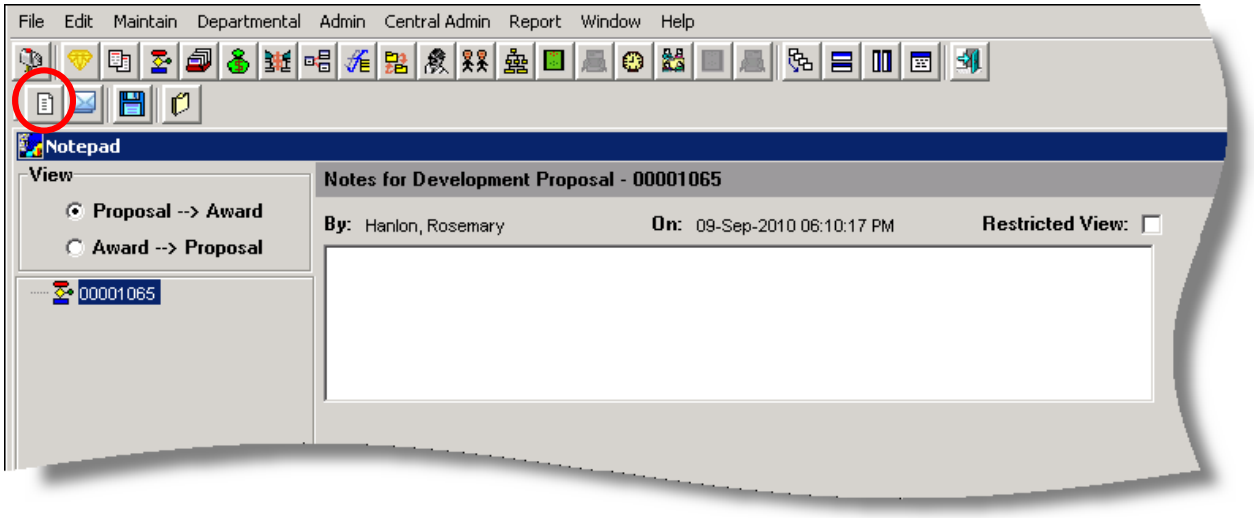
Coeus Communication Tools: Notepad, Notifications, and Email

Notepad is used for communication among users who have roles in a proposal. Messages are stored with the proposal, and they can be transmitted via email.

Creating a Notepad Item

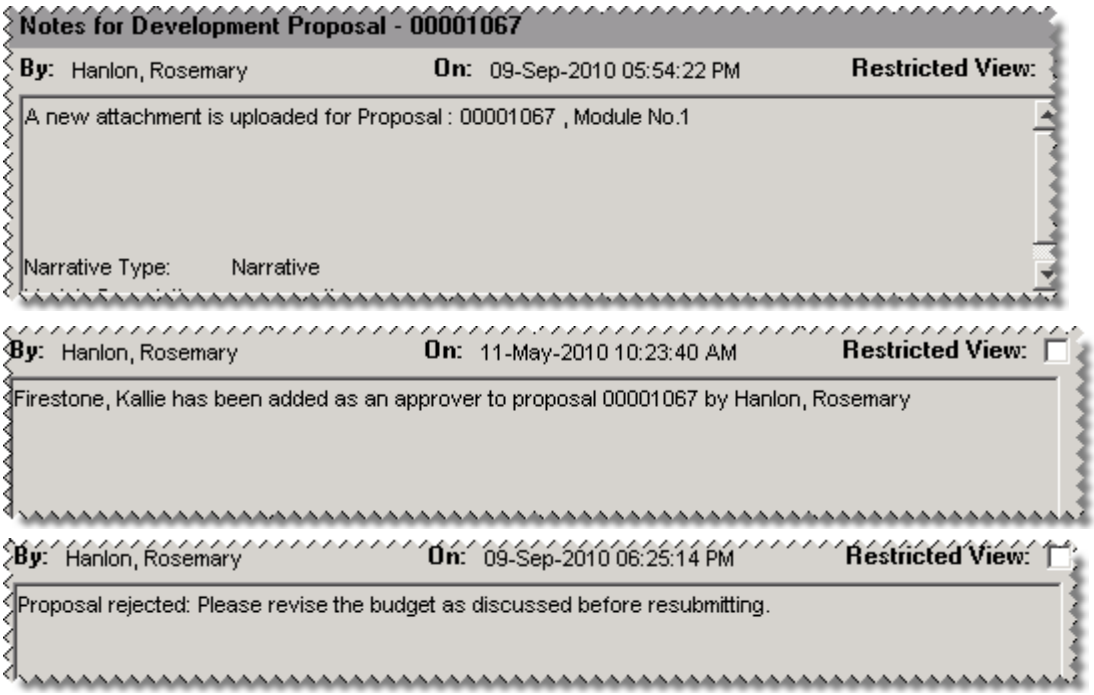
From the PROPOSAL DETAILS screen click the **Notepad** icon or select **Edit > Notepad…**.

1. In the Notepad window click the **Add New Row** icon or select **Edit > Add**. A blank text box opens.
2. Enter your message in the text box. When you are finished, click the **Save** icon or select **File > Save**. The background of the text box becomes grey and your name is added to the header above the text box.



Automatic Notepad entries are made by the system to record events like Proposal Narratives being refreshed, Added Approvers, and Data Override actions and Reject comments.

Some examples of system inserted notepad entries:

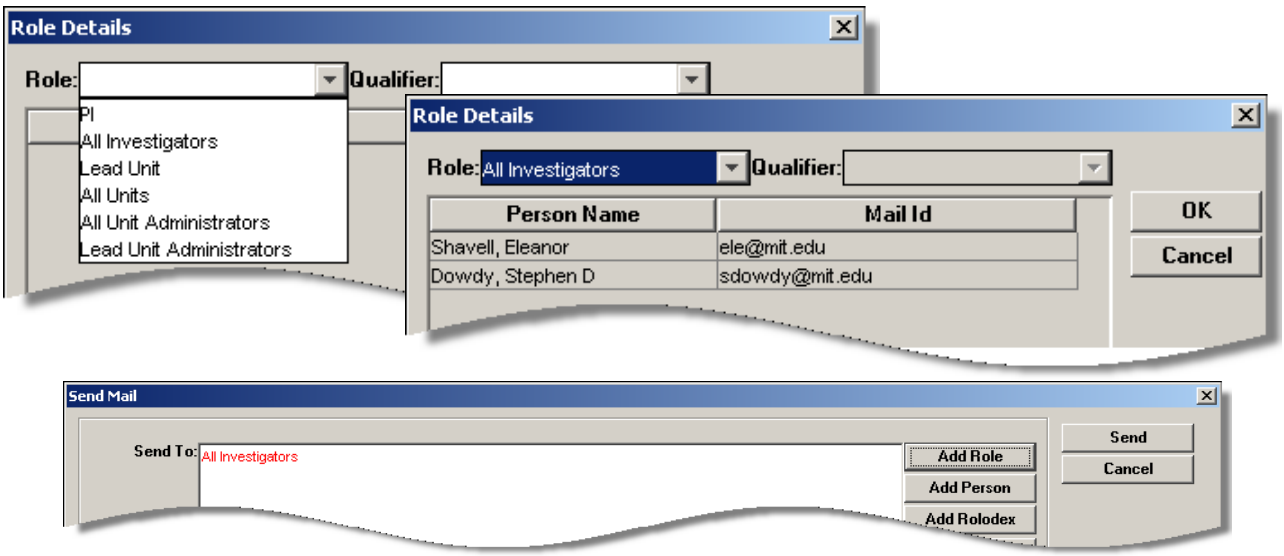


Sending a Notification – aka Send Mail

From the NOTEPAD window, select **Edit > Notify… or** click the **Send Email** icon.

Sending a Coeus Email

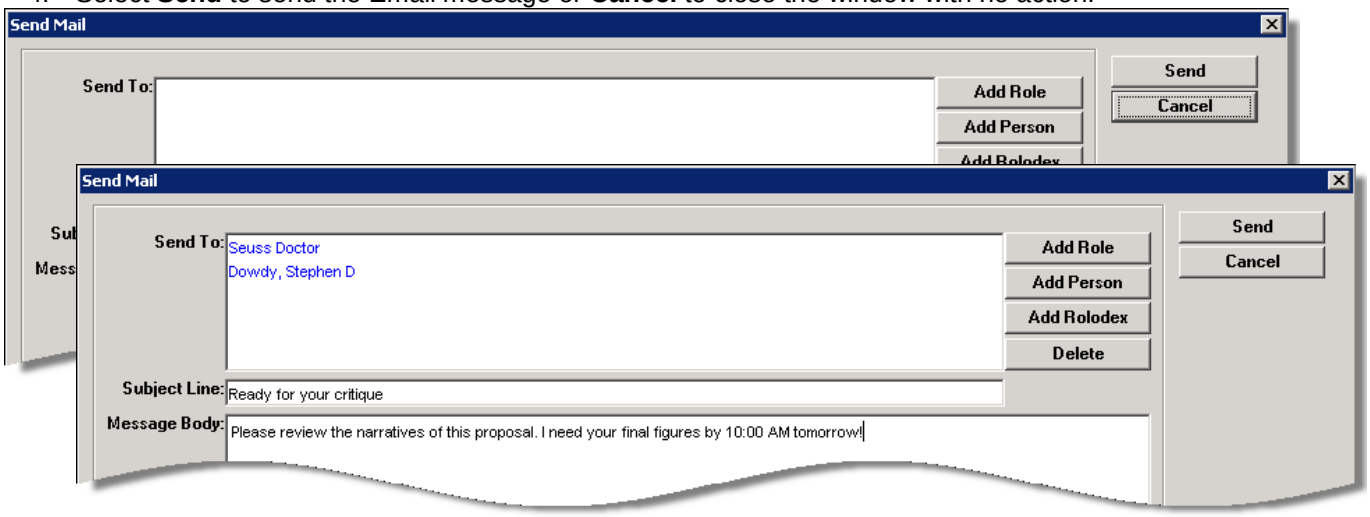
1. From the PROPOSAL DETAILS screen click the **Send Email Notification** icon
   a. Use **Add Role** to select from the maintained group of roles and qualifiers.
   Ex. Selecting Role: All Investigators will send the email to all the persons entered on the proposal Investigator tab.



   b. Use **Add Person** to search institutional personnel.
   c. Use **Add Rolodex** to search the Rolodex.
   d. Use **Delete** to remove the selected person entered in the Send To section.
2. Insert a descriptive title in the **Subject Line**.
3. Insert a message in the **Message Body** field.

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

4. Select **Send** to send the Email message or **Cancel** to close the window with no action.

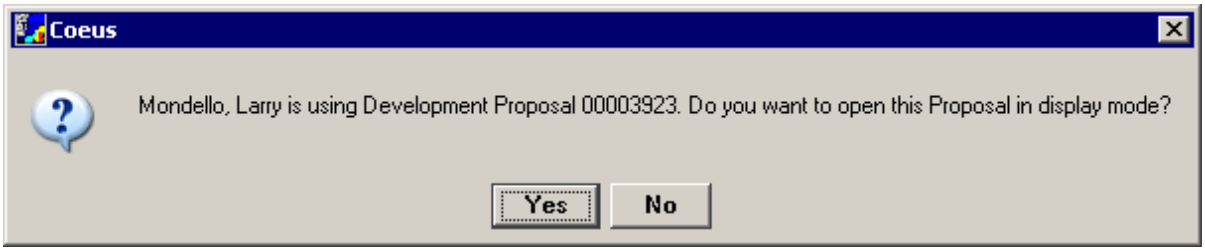


Locks

Whenever a proposal, budget, or narrative is open in modify mode, it is locked to everyone but the user who opened it. This prevents other users from overwriting the initial user's work. However, three users can work on different modules of the same proposal at the same time: One on proposal details, the second user on the budget, and the third on narratives.

Locks can also occur when there is a disconnection between the user's computer and Coeus. The disconnection can be caused by a computer crash, a network glitch or failure, or a server issue. Leaving a proposal open in Modify mode overnight may cause the proposal to lock if the Coeus server is rebooted for maintenance.

When a proposal is locked and you try to open it in modify mode, a prompt window will alert you of the user with the lock, and offer to let you continue to open the proposal in Display mode.

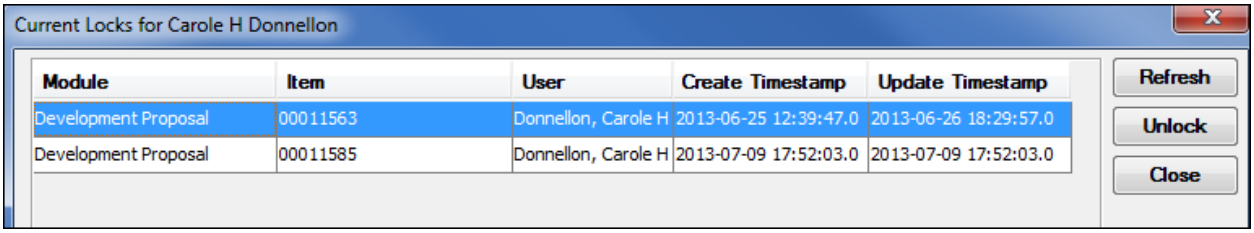


A similar message displays when you attempt to open a locked budget or narrative module.

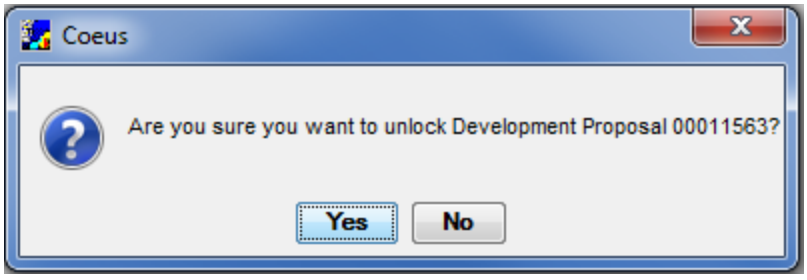
Removing a Lock

You can remove only your own locks. To have another user's lock removed; contact coeus@uc.edu.

1. Select **File > Current Locks**. The CURRENT LOCKS window opens.



2. Select the module (proposal, budget, or narrative) to unlock and click **Unlock**. An alert prompt will ask you to verify your action.



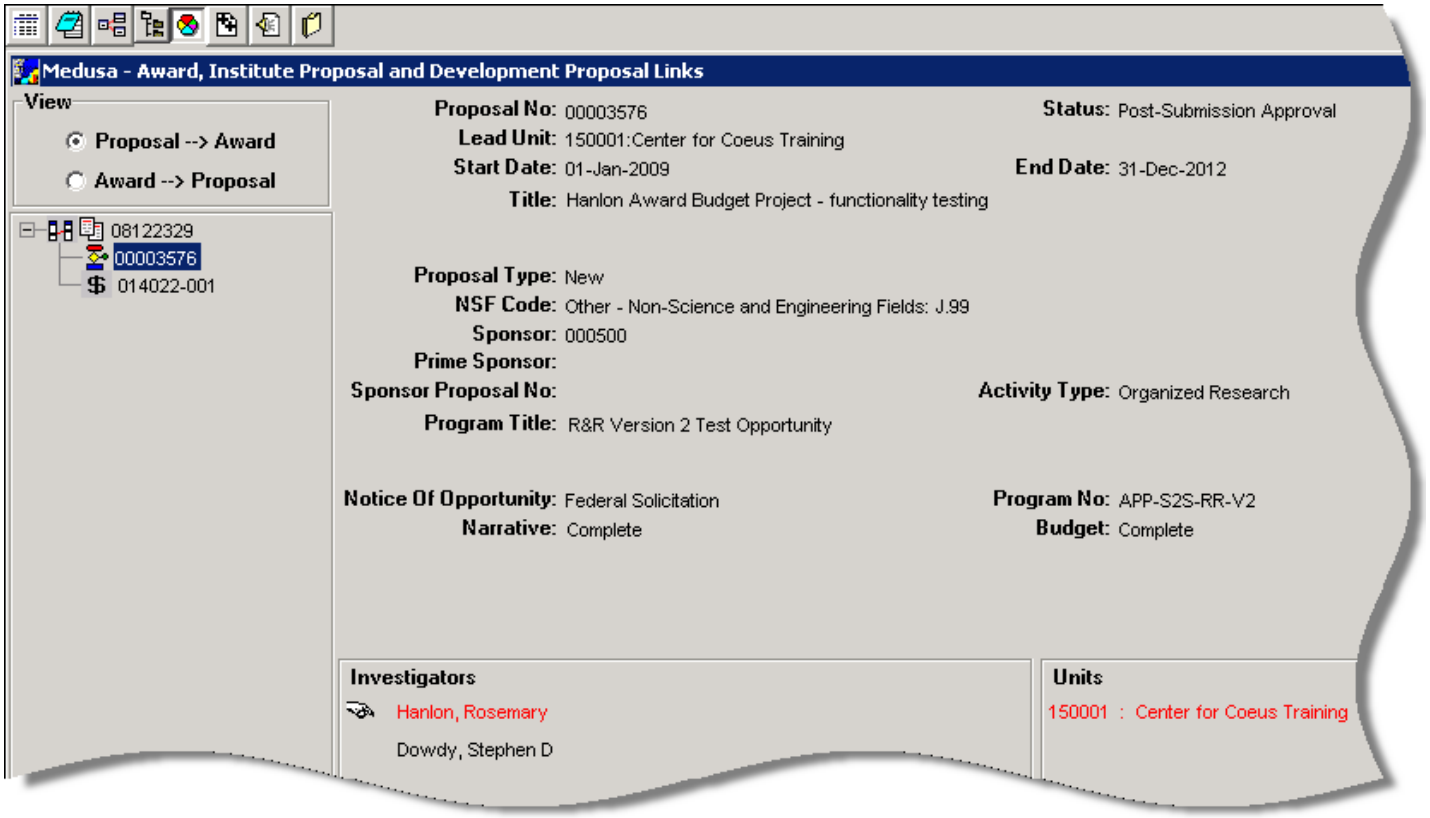
3. Click **Yes**. The module is now available to open in modify mode.

Medusa

Medusa links records pertaining to a proposal from all Coeus modules. It is helpful for locating associated records, especially when you know only one piece of information. For example, if you have the approved proposal development number, you can locate the associated Institute Proposal number using Medusa. In Medusa you can view summary data and navigate to records in other Coeus modules.

Opening Medusa from Proposal Development

1. Click the **Maintain Proposal Development** icon or select **Maintain > Proposal Development…**. In the SELECT DEVELOPMENT PROPOSAL window enter search criteria for the proposal.
2. Click to select the proposal you want from the results in the DEVELOPMENT PROPOSAL LIST and click the **Medusa** icon or select **Edit > Medusa**. The MEDUSA screen opens.



3. Select an item in the tree on the left of the screen to view summary information about it in the right pane. The icons on the left are:

   — Institute Proposal Module

   — Development Proposal Module

   — Award Module

4. You can use the options in the **View** section (upper left of the screen) to change the orientation of the starting point. When you select the **Proposal > Award** option button, the starting point is the Institute Proposal; choose **Award > Proposal** to change the starting point to the Award.

Note: Multiple Proposals, Institute Proposals, or Awards can be linked in one Medusa screen.

Navigating in Medusa

These icons are in the second toolbar in the Medusa screen.

Icon	Name	Function
	Display	Open the selected item in the right pane.
	Notepad	Open Notepad for the selected proposal.
	Maintain Negotiations	Open the Negotiations module.
	Display Award Hierarchy	Open a different screen view of the Award.
	Display Summary	Display a summary of the selected item.
	Expand Medusa Tree	Display all linked records (if there are any) in the tree on the left of the screen.
	Collapse Medusa Tree	Collapse the display in the tree on the left of the screen.
	Close	Close the Medusa screen.

Maintain Department Personnel

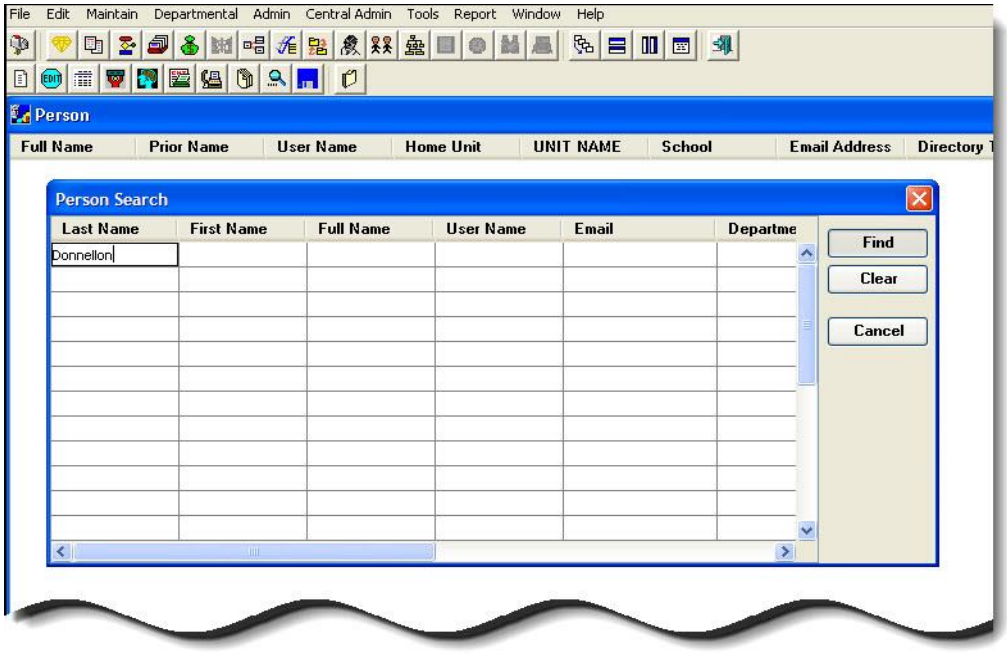
Coeus allows proposal personnel files and biography data to be centrally maintained in the Person Module. Once maintained, these documents (Biosketch, Current & Pending, Budget Details, Statement of Commitment, and Other) can be easily synchronized to proposals.

TIP: Maintaining MSWord files in this central repository allows end users access to master documents which can then be edited to suit the current proposal submission. Note that the edited file would need to be re-uploaded to the current proposal in the proper file format (pdf for most).

Users must have the Person Maintainer role in the home unit of the investigators they wish to support.

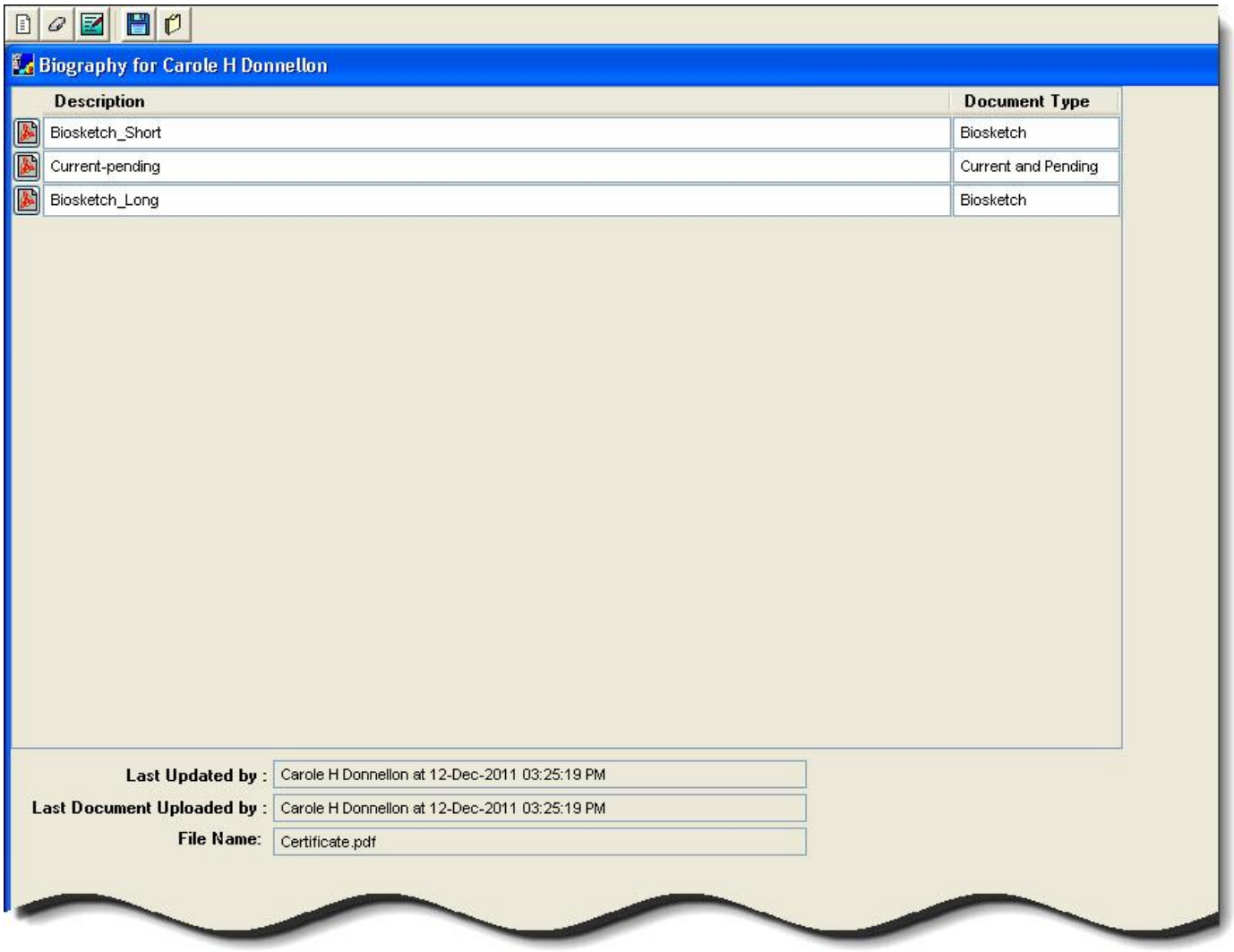
1. From the opening Coeus screen, select **Departmental > Personnel** or use the icon to open a Person Search window.

2. Enter the search criteria to locate the person to maintain and then click the Find button to complete the search. Click on a name in the result panel. The search window will close and the name will appear in the PERSON window.



3. Click on a name, and click on the 2nd tier icon or use the menu path **Edit > Biographical Info** to open the BIOGRAPHY window for the selected person. If any documents have been previously maintained for this person, they will appear in this window.

4. To create a new Biographical Document, click on the Add Module on the 2nd tier icon bar, or use menu path Edit > Add Module to generate a new line.
5. Enter a descriptive title in the Description field, and then select a Document Type from the drop-down list in field on the far right.
6. Click on the 2nd tier icon or use menu path Edit > Upload File. Locate and select the file on your computer using the file look-up tool. The file will be saved to the Biography window. A file type icon will be displayed to the left of the description, and timestamps and actual file name will be displayed at the lower portion of the window.

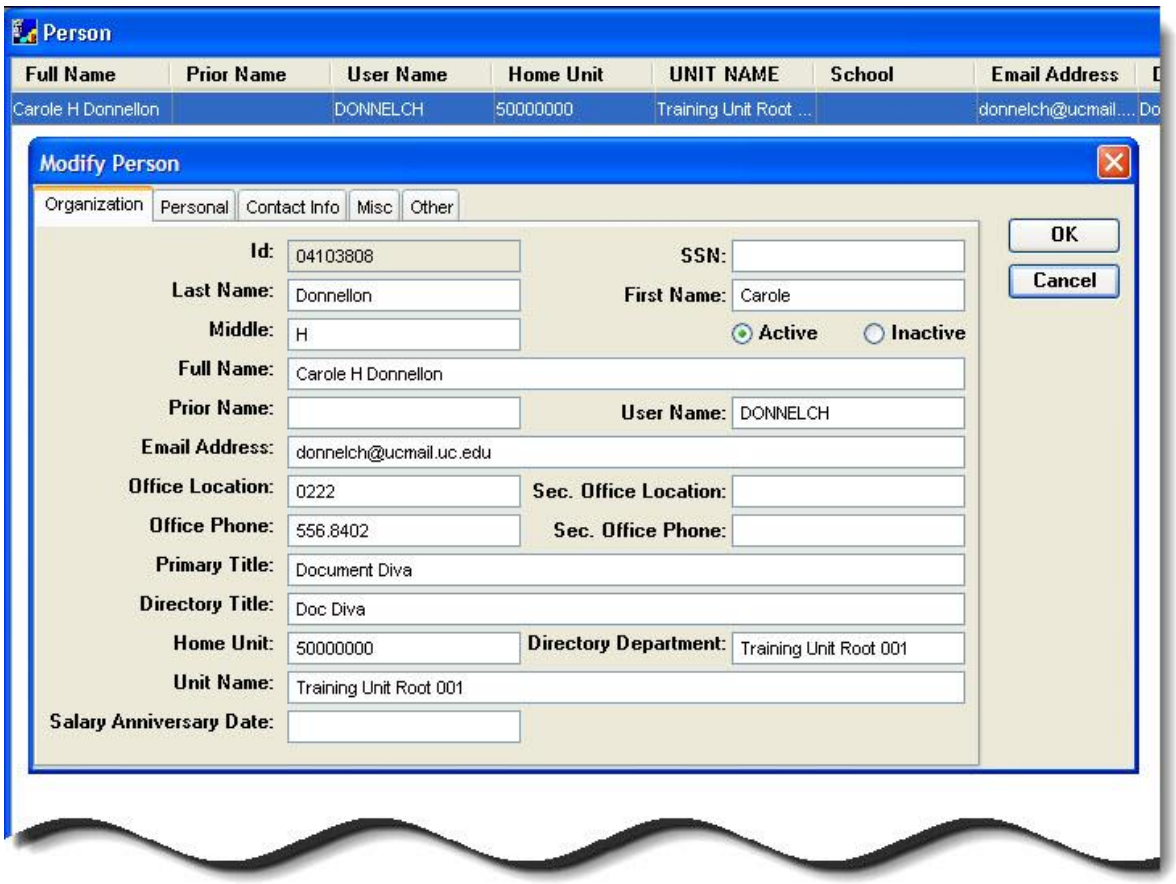


To view a biography file, click on the file type icon to the left of the description. The file will attempt to open using a browser window. The appropriate software must be present on your local computer to fully view the file.

Coeus also allows Person other information to be maintained for investigators by department personnel. Users must have the Person Maintainer role in the home unit of the investigators they wish to support.

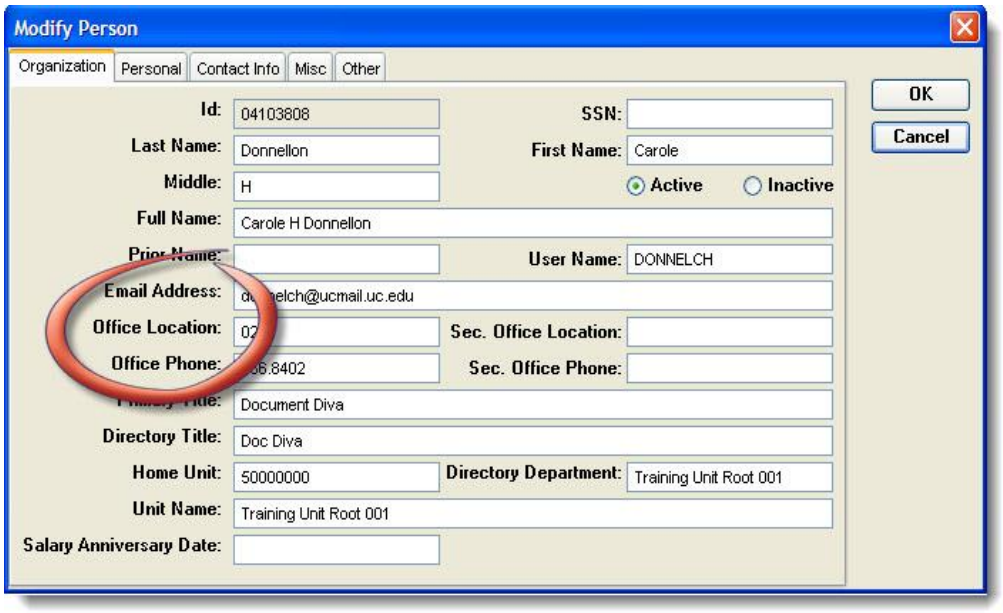
1. Follow steps 1 -3 above.
2. Once a person's name is highlighted, select "edit."

3. The Modify Person Screen Appears.

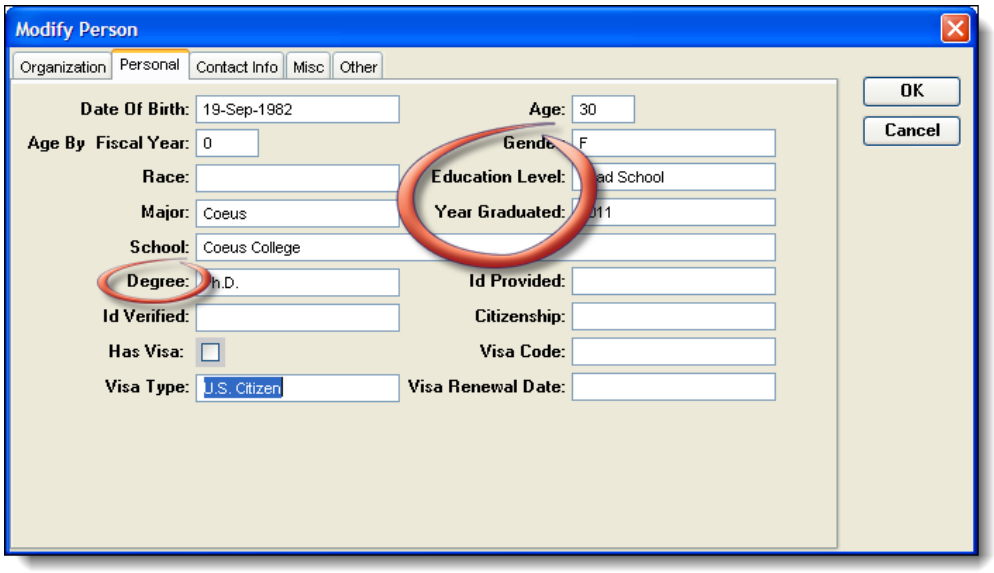


4. Users with the Modify Person role for the investigator's department will be able to change all fields with a white background. Grayed-out fields are not editable. However, Coeus receives a nightly feed from UC's HR system which will override changes to most fields. Users should only edit the fields listed in 5 – 7 as shown below. Please contact Coeus@uc.edu for changes to fields not listed.

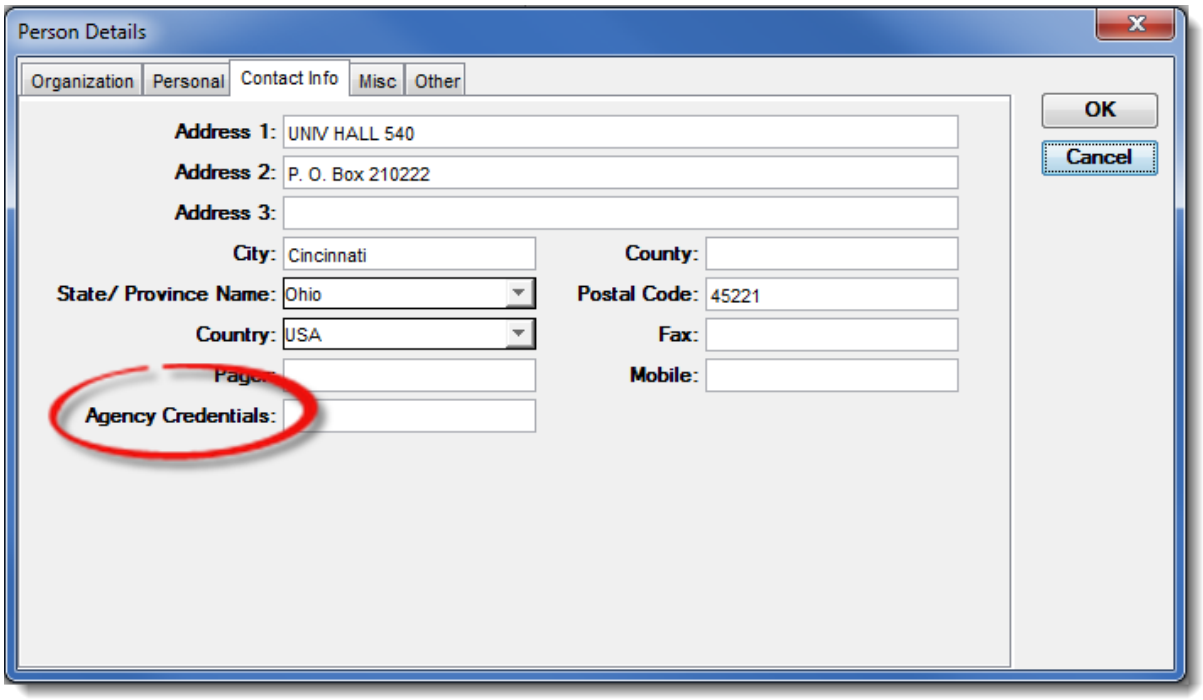
5. Fields which may be maintained at the department level (IE changes will not revert back after nightly HR feed) and may be useful to update on the **Organization** tab are: **Email Address**, **Office Location** and **Office Phone**.



6. Fields which may be maintained at the department level (IE changes will not revert back after nightly HR feed) and may be useful to update on the **Personal** tab are: **Education Level**, and **Degree**.



7. A Field which may be maintained at the department level (IE changes will not revert back after nightly HR feed) and may be useful to update on the **Contact** Info tab is **Agency Credentials**.



Appendix A: Searching in Coeus Premium

This appendix explains how to search for several types of items in Coeus Premium. It tells you how to locate search windows and what to enter in them. Examples of many types of searches are included.

Note: Once a search is underway, it cannot be stopped.

Locating Search Windows

You can search for proposals, awards, or other items from menus or by clicking the appropriate icons on the Coeus toolbars.

Search for this item…	from this menu option…	or with this icon…
Proposal in development	**Maintain > Proposal Development**	
Award	**Maintain > Awards**	
	—	On PROPOSAL DETAILS screen, next to Award No. field
Institute proposal	**Maintain > Institute Proposals**	
	—	On PROPOSAL DETAILS screen, next to Original Proposal field
Person at UC	**Departmental > Personnel**	
Person not at UC	**Maintain > Rolodex**	
Sponsor	**Maintain > Sponsor**	
	—	On PROPOSAL DETAILS screen, next to Sponsor or Prime Sponsor field
Subaward (Subcontract)	**Maintain > Subcontract**	
Negotiation	**Maintain > Negotiations**	
Reporting requirements	**Maintain > Award Reporting Requirements**	—

Entering Search Criteria

Search for items by entering criteria in search windows. Searches are not case-sensitive, so you can enter search terms in upper, lower, or mixed case.

You can enter search criteria in any column of a search window. Move the scrollbar at the bottom of the window to see all columns.

The fields in some columns have drop-down lists. In those columns the drop-down arrow displays only when you click in the field. Click the arrow to select an entry from the list.

The fields in some columns accept text entries. You can enter all or part of a search term. To enter a partial value, use the wildcard.

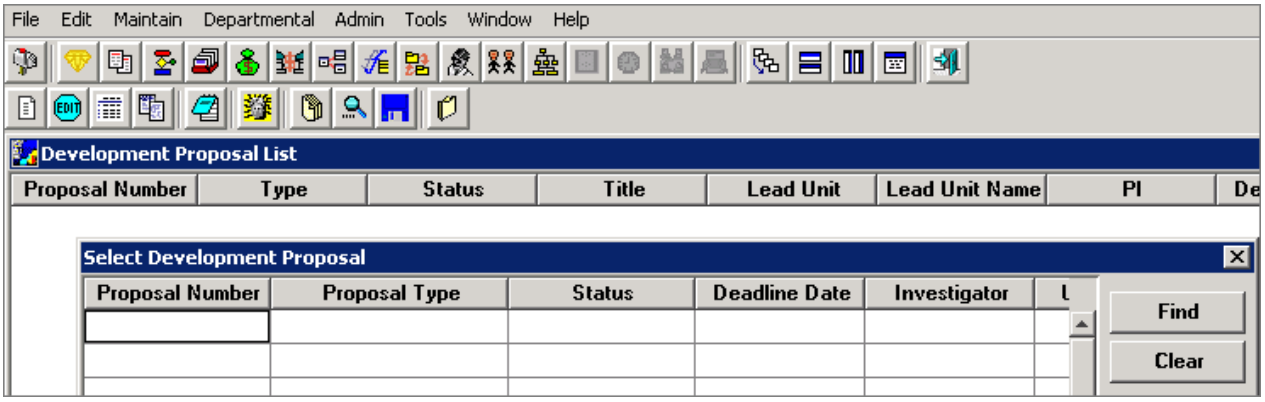
You can use the greater-than and less-than operators to search for numerical ranges.

Operator	How to Use
string* *string ***string***	Enter the wildcard symbol, *****, before or after a text string to indicate that other characters might be present. You cannot use the wildcard in the middle of a string; see underscore.
*string_* *string* (underscore)	Enter the underscore(s) between characters to indicate an undefined character(s). Underscore(s) will search for any character a-z, A-Z 0-9, %^& etc. You must include the wildcard symbol, *, to trigger a search *not* based on an exact match. You can use multiple underscores to represent multiple positions in a string.
<*X* or **<=***X*	Find all values that are less than *X*, or less than or equal to *X*.
>*X* or **>=***X*	Find all values that are greater than *X*, or greater than or equal to *X*.

Searching for a Proposal

Search for a proposal by entering information about it in fields of the SELECT DEVELOPMENT PROPOSAL search window.

In the main Coeus screen click the **Maintain Proposal Development** icon or select **Maintain > Proposal Development…**. The DEVELOPMENT PROPOSAL LIST screen opens, with the SELECT DEVELOPMENT PROPOSAL search window over it.



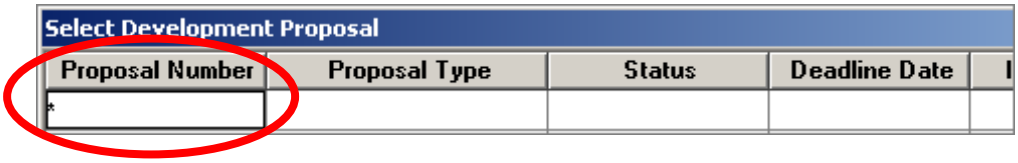
Enter search criteria in one or more fields of the SELECT DEVELOPMENT PROPOSAL window. (See examples of search criteria below.)

Click **Find**. Coeus searches for proposals that:

- Satisfy the criteria you entered in the search window, ***and***
- You have one or more of these roles in: aggregator, approver, budget creator, narrative writer, or viewer.
- The following sections are examples of specific types of searches.

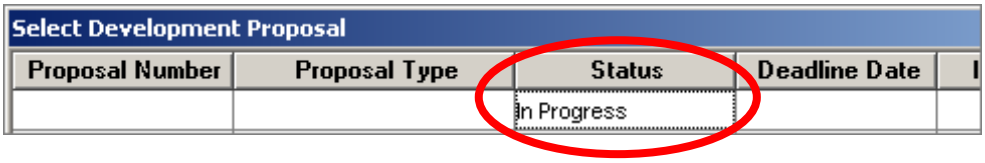
Searching for All of Your Proposals

Enter a wildcard (asterisk – *****) in the **Proposal Number** field. The search returns all proposals where you have a role.



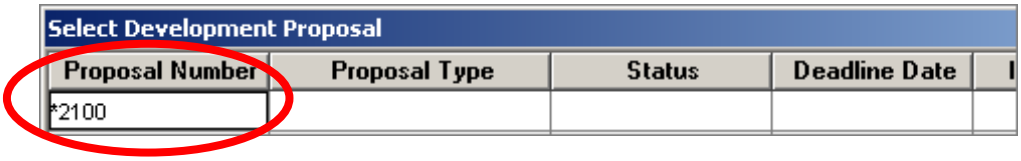
Searching for Your In-Progress Proposals

Select ***In Progress*** from the drop-down menu in the **Status** field. This search returns a list of all proposals that you have a role in and that have the status ***In Progress***.

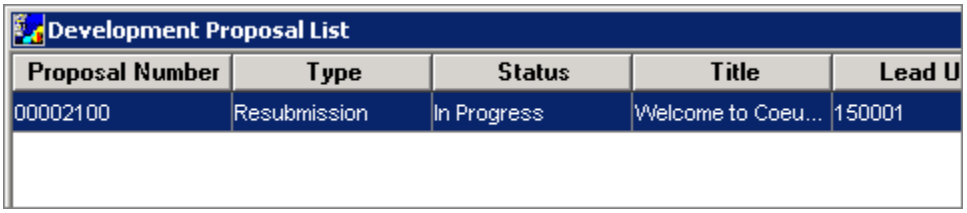


Searching for a Proposal by Number

Enter the number in the **Proposal Number** field. Using the wildcard saves entering "0000" at the start of the number.



The search returns one proposal in the list (assuming you have a role in this proposal).



Searching for a Proposal by Title

Use the wildcard in the **Title** field to search for a proposal by a string in the title. In this example the search is for a proposal with "nanocrystal" in the title. The wildcard is used on both ends of the string.

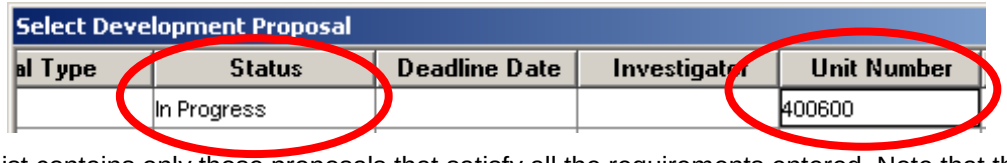
A list of your proposals that have the string in the title is returned. Searches are not case-sensitive (note the titles in the list returned).

Searching by Multiple Criteria

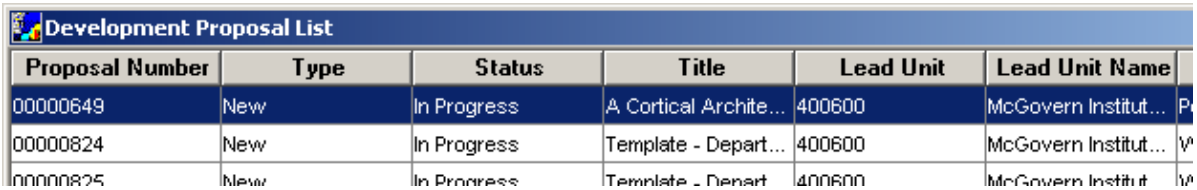
You can search for items that satisfy more than one criterion. When you enter search terms in the same row, you are looking for items that satisfy all of the conditions entered. When you enter them in different rows, you search for items that satisfy any of the conditions entered.

In the Same Row

In this example, the search is for In Progress proposals from a specific unit. You can enter any number of terms to narrow the search, but be sure to enter them in the same row if you want to find items that meet all of the criteria.

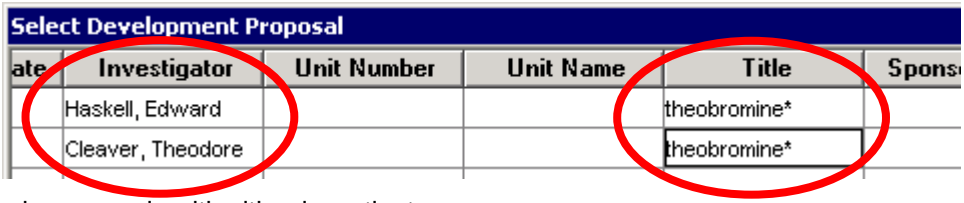


The resulting list contains only those proposals that satisfy all the requirements entered. Note that the entire list is not shown here.

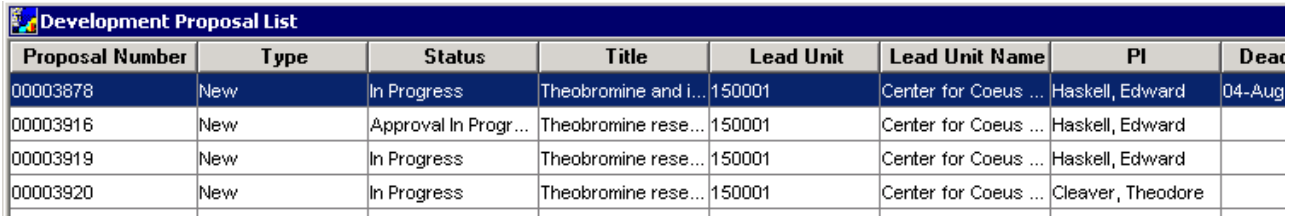


In Different Rows

When you enter search terms in different rows, you tell Coeus to expand the search by looking for items that satisfy one or more of the criteria entered. In this example the search is for proposals that have titles that start with “theobromine” and have either Edward Haskell or Theodore Cleaver as an investigator. Note that the title is included in both rows.

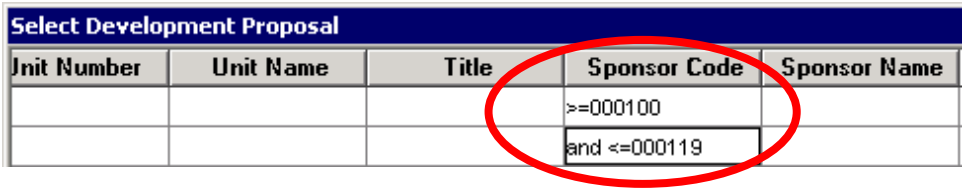


The results include proposals with either investigator.



Searching for a Range

Say you need to search for all proposals with an Air Force sponsor. You know that the sponsor codes are consecutive numbers between 000100 and 000119. This is how you enter the search criteria:



Read the criteria as “Sponsor Codes that are greater than or equal to 000100 and that are also less than or equal to 000119.” When you do this type of search it is very important to insert the word “and” in the second row. Without it, Coeus would return all sponsor codes. (Without the “and” you would read the search criteria as “Sponsor Codes that are greater than or equal to 0001000 or Sponsor Codes that are less than or equal to 000119.” That includes everything.)

This partial results list contains sponsor codes within the specified range.

Development Proposal List

Lead Unit	Lead Unit Name	PI	Deadline Date	Sponsor Code	Sponsor Name
154500	Brain and Cognitiv...	Rosenholtz, Ruth ...	02-Apr-2004	000106	Air Force Office o...
121000	Sloan School of M...	Madnick, Stuart E		000100	Air Force ...
066000	Materials Science ...	Powell IV, Adam C	01-May-2006	000106	Air Force Office o...
065000	Mechanical Engin...	McKinley, Gareth H	28-Apr-2006	000108	Air Force Resear...
066000	Materials Science ...	Schuh, Christoph...	31-May-2006	000106	Air Force Office o...

Searching for a Person at UC

Search for a UC employee by clicking the **Find Person** button in the INVESTIGATOR or KEY PERSON tab, or by clicking the **Maintain Personnel** icon or selecting **Departmental > Personnel…**.

It is not necessary to enter the full name; in the example that follows, both **Last Name** and **First Name** fields have entries, to narrow the search. But **Haskell** and **Mondello**, or **Hask*** and **Mond*** in the **Last Name** field would be sufficient.

You can search for more than one person at a time by entering names in different rows, as shown in the example.

Person Search

Last Name	First Name	Full Name	User Name	Email
Haskell	Edward			
Mondello	Larry			

The search result displays all people whose information satisfies the search criteria.

Person

Full Name	Prior Name	User Name	Home Unit	School	Email Address	Director
Haskell, Edward		eddieh	150001	Mayfield College	eddieh@mit.edu	Professor
Mondello, Larry		larrym	150001	Mayfield College	larrym@mit.edu	Project Man

Note: Results are listed alphabetically. All results in upper case are listed first, then those in mixed case, as shown below.

In the example below, the search was for **Cleaver** in the **Last Name** field. Notice that the results are not strictly alphabetical, since those that are in all uppercase letters are listed before those that are in mixed case. When a person search results in a long list, be sure to check the entire list for the person you are looking for.

Person

Full Name	Prior Name	User Name	Home Unit	School	Email Address
CLEAVER, JUNE		JCLEAVER	151000	MAYFIELD COLLE...	JCLEAVER@MIT....
CLEAVER, WALLA...		WALLYC	093800	MAYFIELD COLLE...	WALLYC@MIT.E...
Cleaver, Theodore		thebeave	150001	Mayfield College	thebeave@mit.edu
Cleaver, Ward		wcleaver	150001	Mayfield College	wcleaver@mit.edu

Searching the Rolodex

Search for a person from outside of UC by using the Rolodex. Click the **Maintain Rolodex** icon or select **Maintain > Rolodex…**. Or from the ORGANIZATION tab click the **Find Addr** button, or from the INVESTIGATOR or KEY PERSON tab click the **Find Rolodex** button.

Search for someone in the Rolodex as described in *Searching for a Person at UC*, page 135

How to Reopen a Search Window

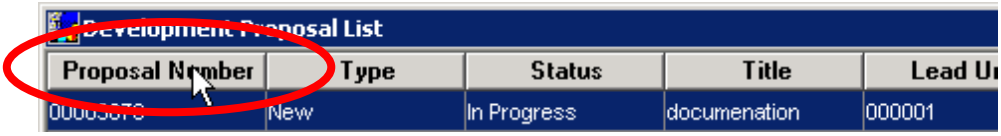
After you close the search window, you can open it again from the screen that displays results.

Click the **Search** icon or select **Tools > Search**.

How to Sort the Result List

Single-Level Sort

In a single-level sort you sort by one column. Click on the head of the column to sort by.



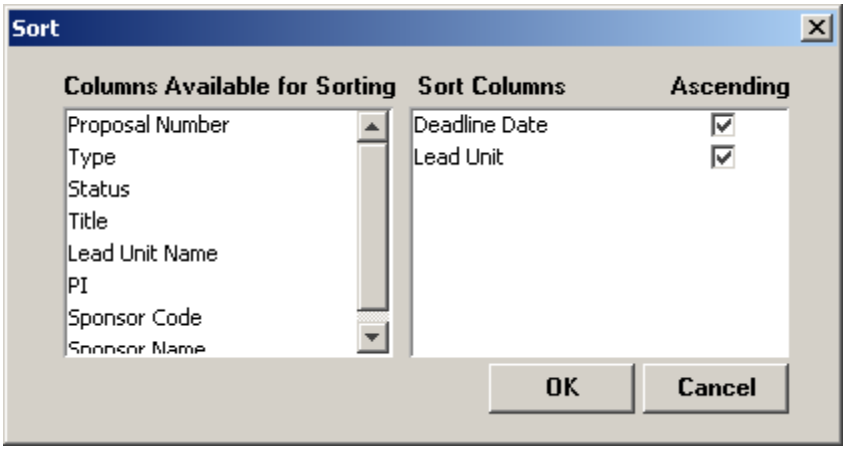
The number of times you click determines the resulting order:

- Once – ascending.
- Twice – descending.
- Three times – return to the original order.

Multiple-Level Sort

A multiple-level sort lets you sort by more than one column.

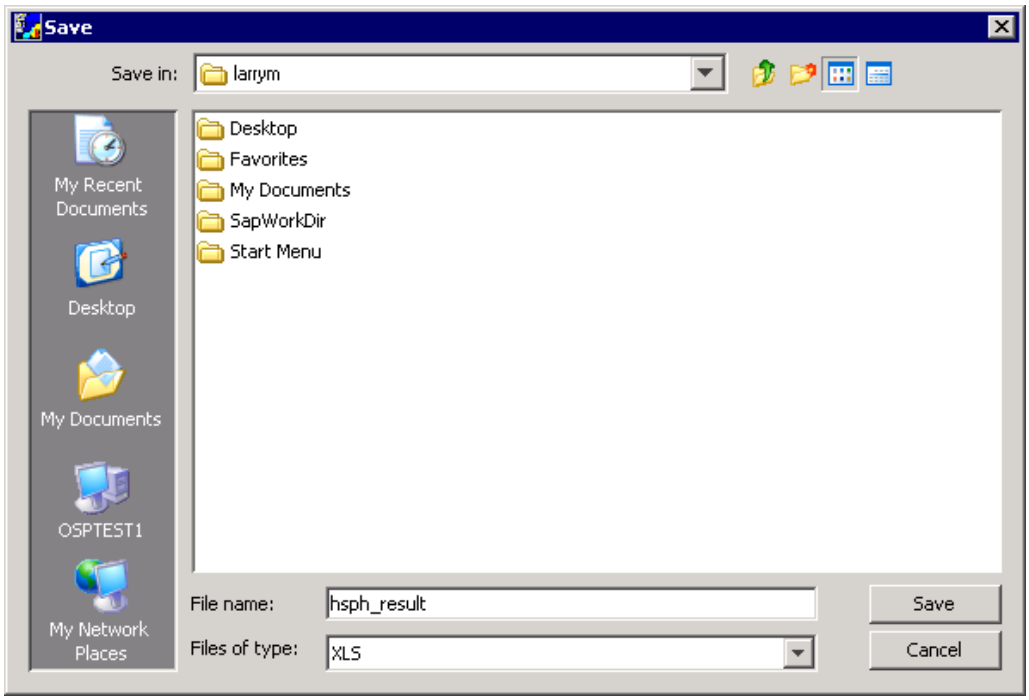
1. Click the **Sort** icon or select **File > Sort**. The SORT dialog box opens.



2. Drag the names of the columns to use in the sort from the pane on the left (**Columns Available for Sorting**) to the pane on the right (**Sort Columns**). The order of column names on the right is the sort order.
3. The **Ascending** checkbox is selected by default; clear the checkbox if you want the sort for that level to be descending.
4. Click **OK**.

How to Save Search Results

1. From the search results screen, select **File > Save As**. The SAVE dialog box opens.



2. Select the format and location of the file to save the results to, and supply a file name.
3. Click **Save**.

Appendix B: Cost Elements Used in Proposal Development at UC

A subset of the available cost elements (GLs) is used for proposal submission. As a result, many of the GLs you are accustomed to seeing in UC Flex are unavailable. Coeus groups the GLs into budget categories to support printing of sponsor forms. These categories are dependent on the individual sponsor's needs. Each available cost element has been assigned to a budget category based on UC use and sponsor definition. You can reset the budget category when needed to support unique budget submission requirements

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
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 AAUP) FT-Fed Fringe
FAEFTNON	Fac (non AAUP) FT-Non Fed Fringe
FAEPTFED	Fac (non AAUP) PT-Fed Fringe
FAEPTNON	Fac (non AAUP) 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
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 C: Abbreviations Used in This Guide

Abbreviation	Description
AO	Authorized Official
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

Appendix D: Tips

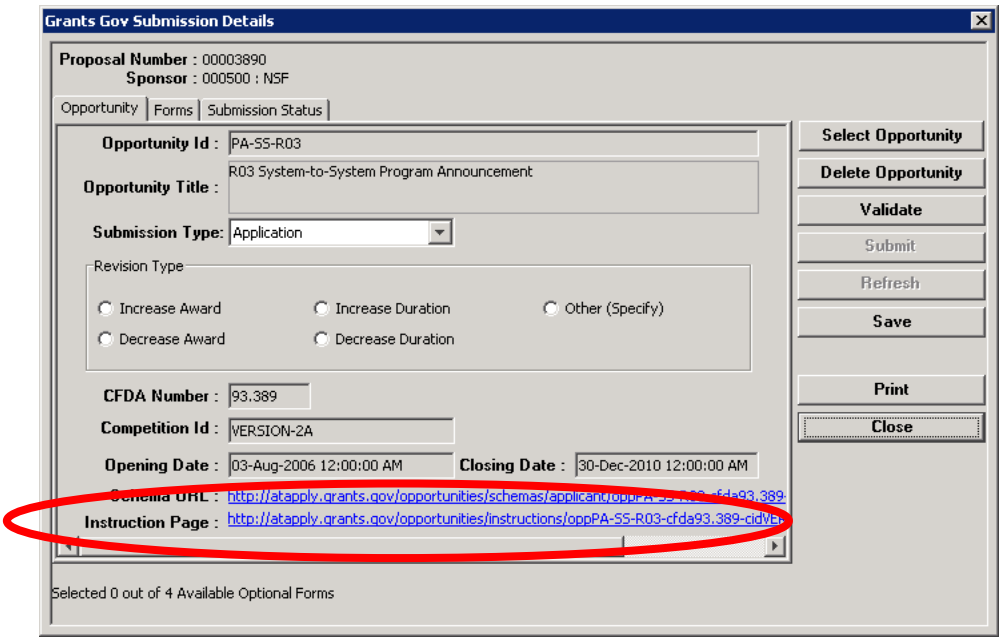
Getting Help with Coeus

If you cannot find help in the documentation, or if you are having system trouble, then please contact UC's Coeus help center at coeus@uc.edu.

Please make your request as specific as possible and include the proposal number if applicable.

Finding Sponsor Requirements

For submissions to a federal sponsor that uses grants.gov, the Grants.gov Submission Details window displays a link at the bottom labeled **Instruction Page**.



Click this link to find sponsor requirements. Other sources of information about sponsor requirements include the sponsor's web site and Grants.gov.

Recalculating the Budget

You can recalculate the budget at any time by clicking the **Calculate Budget** icon or selecting **Budget Periods > Calculate All Periods** or **Budget Periods > Calculate Current Period**.

Leaving the Proposal Open in Modify Mode

Save your proposal often, and close it by clicking the **Close** icon or selecting **File > Close** when you will be away from it for extended periods.

Leaving a proposal open in modify mode overnight or for long periods during the day can make it susceptible to connectivity issues. The Coeus server may be rebooted for maintenance overnight, and any open proposals are locked when connectivity to the server is lost.

See the section *Removing a Lock*, page 124, if your proposal is locked. Please contact coeus@uc.edu if the proposal is locked by another person.

Opening only the Budget or Narrative

If someone is working in the Proposal Development module of a proposal, you can still open the Budget or Narrative module (assuming that someone else does not have it open).

1. Search for the proposal and click to select it in the DEVELOPMENT PROPOSAL LIST.
2. Select **Edit > Budget** or **Edit > Narrative**. The requested module opens.

What "No Special Characters" Means

Anything that is read by Grants.gov is limited to a small set of characters. Throughout this guide are warning statements about "no special characters," meaning that no accented letters (such as ü) or symbols can be used.

When you see the "no special characters" warning, the ***only*** characters that can be used are:

- Uppercase letters: ***A*** to ***Z***
- Lowercase letters: ***a*** to ***z***
- Numbers: ***0*** to ***9***
- Underscore: _
- Hyphen: **-**

Remember – spaces are special characters! Delete spaces in file names and descriptions, or replace them with underscores or hyphens.

Appendix E: Budget Summary Report Samples

You can use Coeus to create the types of budget summary reports described here. (See *Printing a Budget Summary Report*, page *80*.)

- ***Budget Summary by Period*** — Comprehensive budget report of all expenses by period. Includes details of all personnel expenses, subtotal of salaries and wages, total cost to sponsor, total cost sharing amount, and total cost of project. Also contains MTDC calculation methodology, detailing excluded expenses from F&A, F&A rates used (effective dates, bases, and calculated costs), and fringe rates used (effective dates, bases, and calculated costs).
- ***Cost Share Summary by Period*** — Comprehensive budget report of all expenses by period with the addition of columns displaying total cost to sponsor, cost sharing, and total cost of project for each line item.
- ***Cumulative Budget*** — Total of all cumulative budget expenses, displayed by category. Less detailed personnel expense than the Summary By Period report. All cumulative expenses displayed. MTDC calculation methodology details excluded expenses and all rates utilized in calculation.
- ***Budget Total*** — Table format report displays columnar data for: Cost Element, Description, Period 1, 2, 3 etc., Total (all periods). Line items displayed for OH, Employee Benefits, etc and Total by column.
- ***Industrial Budget by Period*** — Displays each line item expense with less detail than Budget Summary By Period. Personnel lines display start and end dates, percent charged, percent effort, and total salary and wage. (Budget Summary by Period reports fringe rates and fringe amount). No report of subtotal of salaries and wages. No line item for F&A on budget sheet (appears on Calculation Methodology page). Calculation Methodology: MTDC Calculation Methodology details excluded expenses, and all rates utilized in calculation.
- ***Industrial Cumulative*** — Table format report displays columnar data for: Cost Element, Description, Period 1, 2, 3 etc., Total (all periods). Total by column is displayed.

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