

**Coeus®**

Version 4.1.1

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# **Proposal Development**

User Guide

## COEUS 4.1.1 – Proposal Development

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## Introduction to Proposal Development

### *Who Should Read This*

The *Proposal Development User Guide* for Coeus is intended for users who are authorized to create, modify, or approve proposals.

### *A Basic Understanding of Coeus' Proposal Development*

Proposal Development as a process can be divided into four separate phases:

1. **Proposal Detail Entry:** In this phase, you will enter the basic details of your proposal, these details populate the face pages, etc.
2. **Budget Creation:** In this phase, you will create the budget (or multiple budgets).
3. **Upload of Narratives:** In this phase, you will upload the documents such as the facilities, science narrative, equipment, bibliography, etc.
4. **Submission for Approval:** In this phase, you will finalize your proposal, which includes answering the Yes/No Questions, certifying your investigators, and validating the proposal. Then, of course, submitting for approval routing.

Therefore, the *Proposal Development User Guide* will be divided into those four phases. That way, if you complete one phase, save your work and set the proposal aside, you can come back later, and pick up at the next phase with ease.

### *Notation Conventions*

In order to help users familiarize themselves with Coeus, this manual employs certain notation conventions in the text to indicate the following:

Convention	Example	Used For
Menu names separated by ">"	Select <b>Maintain &gt; Proposal Development</b>	Navigation Path
Text in bold, sans serif	<b>Biosketch</b>	Field values that you either select or type.
Text in bold, sans serif between angle brackets	[ <b>Find Addr</b> ]	Labeled buttons; the text in the brackets appears exactly as it does on the button

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Text in bold, sans serif between vertical lines	<b>Investigators</b>	Labeled tabs; the text between the lines appears exactly as it does on the tab
Text in italics, sans serif	<i>MM/DD/YY</i>	Text or codes indicating the format of the value you enter in a field.
Text in sans serif	Proposal Persons	Indicates the names of icons, checkbox labels, and radio button labels
Text in italics	<i>Program Title</i>	Field names, hyperlinked text, or document titles
Text between “< >”	<Enter>	Specific keyboard keys; text appears exactly as it will on your keyboard

### **What’s New for Version 4.1.1**

- In 4.1.1 you have the ability to edit/upload refreshed PDF files to a proposal that has been submitted for approval (but not after it has been submitted to the sponsor). So, you can start your routing and approval with draft science. If you refresh the science during routing, any person that has already approved the proposal is sent an email to alert him/her that the narratives were refreshed. That way, if the person wants, he/she can go back to reread the narratives. See “Uploading a Revised Version of a Narrative After Submitting the Proposal for Approval” on page 60 for more details.
- Users now have the ability to unlock a proposal that has been locked up to their username. Previously, this was a function that a Coeus Systems Administrator had to do. See “Unlocking a Proposal for Editing” on page 76.
- The new Modular Budget [**Sync**] button takes the data from your detailed proposal and automatically suggests the modules (i.e. which \$25,000 chunk). You will be able to override the sync if necessary; however, the [**Sync**] button will make creating a modular budget faster and simpler. For more on the Modular Budget [**Sync**] button, see “Modular Budget for NIH Proposals” on page 50.
- A special role called **Modify All Dev Proposals** has been created in the User Maintenance Database that, when granted to a user, allows that user to modify any and all proposals in his/her unit. At MIT, this role is only granted by the approval of the Administrative Officer for that DLC.
- Improved Grants.gov user interface, including highlighted links and a banner to indicate a Grants.gov proposal is being submitted.

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- Coeus now has the ability to split investigator credit. While this is not a system that MIT uses, many institutes around the country split the investigator credit, and Coeus has created a simple way to do it. See the section entitled The *Investigator* Panel which begins on page 15 to see how to use the Investigator Credit Split function.
- Several new Narrative types have been introduced with Coeus 4.1.1 that are specific to various Grants.gov sponsor requirements, such as NIH and NSF. An Appendix to this document has been added to distinguish the various Narrative types and the sponsors to which they correspond. Go to page 78 to view Appendix A – Narrative Types.

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## Starting a New Proposal

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When you create a new proposal, the information you enter and upload in the series of windows accessed through the **Maintain > Proposal Development** menu option will accommodate all the information required by the sponsor and the Institute for a full proposal submission.

With Coeus, you can respond to any US Federal funding opportunities without having to know which forms to fill out for that particular announcement (there are over 50 possible forms to choose from) because Coeus has been designed to work seamlessly with Grants.gov. This means that the information you input will be configured by Coeus to the appropriate Grants.gov form.

Additionally, your proposal can be routed electronically for Institutional authorizations, and then submitted directly to Grants.gov, avoiding the need to use PureEdge forms. Coeus can also be used to prepare proposals for paper submission to both Federal and non-Federal agencies.

You can start a new proposal when you need to:

- Create a brand new proposal
- Resubmit (revise) a proposal to a sponsor to make it more competitive
- Supplement an approved proposal or award
- Renew an award




**NOTE:** You will use the Proposal Development function of the Maintain menu to create and modify proposals, **not** the Proposals function, which is the listing of institute approved proposals (a proposal which has already been approved and submitted to a funding agency).

You may have created or have access to a copy of a departmental template for proposals and to use as your base. A departmental template may include all department staff pre-loaded into the Budget Persons Table, the start and end date for the current fiscal cycle, a title (which you will need to change), a proposal type of **New** and activity type of **Research**. The template will provide only the most basic information. You will have to add all of the details for your proposal. To copy the proposal, see Copying an Existing Proposal, on page 8.

## Accessing Proposal Development

When you select the Proposal Development function, the Proposal List window is displayed, with a search window open on top of it. Before you can continue, you will either have to close the search window and start a new


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proposal, or search for an existing proposal to view, copy, or modify. Once the search window is closed, you can create a new proposal by clicking the Add a new proposal button  on the lower toolbar or you can go to **Edit > New Proposal** on the menu bar.

### Starting a New Proposal

#### ➡ To begin a proposal from scratch:

1. Select **Maintain > Proposal Development** from the menu. The Proposal List window will be displayed, with the Proposal Search window open on top of it.
2. Close the Search window by clicking on the [**Cancel**] button.


Click on the Add a new proposal button  to display the Proposal Details window. This will open a blank Proposal Details window and you can begin the new proposal.



**NOTE:** If you are authorized to create proposals for more than one Department, Lab, or Center (DLC), you will be prompted to indicate the unit where this proposal will be processed. Make sure you select the right DLC, since the unit number can't be changed during the proposal process. If you enter the wrong unit, you will have to make a copy of the proposal under the correct unit in order to change this value.


### Copying an Existing Proposal

#### ➡ To copy an existing proposal:

1. Select **Maintain > Proposal Development** from the menu. The Proposal List window will be displayed, with the Proposal Search window open on top of it.
2. Enter your proposal number in the proposal number field (or other searchable information in the appropriate column, such as PI or Unit)
3. Click the [**Find**] button.
4. Click the row in the search results that contains your proposal.
5. Select **Edit > Copy Proposal...** from the menu, or click the Copy Proposal button. 
6. A popup box will appear. Check the Budget checkbox if you want to copy the budget (recommended), and select the radio button below to indicate if you will copy only the final version of the budget or all versions (if no

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budgets were marked final, no budgets will be copied, so “copy all versions” is recommended). Then check the Narrative checkbox if you want to copy the narrative section of the department template.

7. You will see a new line on the Proposal List results field that has the same details as your template, but with a higher Proposal Number.
8. Click on the new proposal with the higher Proposal Number to select it, and then click the Modify Proposal button 



**Tip!** Don't double-click the highlighted proposal line – this will open the proposal in View Only mode (notice the gray background in all the entry fields.) If you do this by mistake, close the proposal, return to the Proposal list, highlight the correct proposal (one click!), then either click the Edit button, or go to **Edit > Modify Proposal**.

### Completing the Proposal Details

The Proposal Details module contains tabs for several panels, where you can insert information about the proposal. In order to make your proposal work smoothly with Grants.gov, you should input as much information in the proposal as you can. When Coeus submits your completed and authorized proposal to Grants.gov, it will utilize your proposal information to complete the forms selected by the agency for that specific funding opportunity. With Coeus, you have the ability to validate your proposal data against the Grants.gov opportunity form-set prior to submission. If you haven't supplied all the required information, Coeus will alert you of the missing elements.

### The Proposal Panel

The Proposal panel under the **Proposal** tab is where you enter the basic information about the proposal—the period of performance, the title of the proposal, the type of proposal, the sponsor, and a few other identifying features. Before Coeus, this information was entered on the sponsor face pages, and the Institute Proposal Summary Form.



**Tip!** You will notice that Coeus has already assigned the proposal a unique Proposal Number in the Proposal No field. You may want to jot this number down for your future reference. You will probably need to continue working on this proposal at another time, and the Proposal Number will make your search fast and simple when you go to look it up in Coeus.

#### ➡ To complete the Proposal panel:

1. In the *Title* field, enter the title of the proposal, which is usually required to be not more than 54 characters long, depending on the sponsor. If you have copied a template, this field will contain a dummy value. Replace it with the title of your proposal.

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2. In the *Start Date* field, enter the date when you expect the project to start, in *mm/dd/yy* format. When you tab out of the field, the date will be formatted.

If you have copied a template (as described in “Copying an Existing Proposal,” on page 8), this date will be filled in. Change it if it is not correct for your proposal.


3. In the *End Date* field, enter the date when you expect the project to end, in *mm/dd/yy* format. The start and end dates should encompass the entire project period. Press the <Tab> key to continue to the next field. The date will be reformatted when you leave the field.

If you have copied a template, this date will be filled in. Change it if it is not correct for your proposal.

<b>Proposal No:</b>	00001000	<b>Status:</b>	In Progress	<b>Narrative:</b>	✘	<b>Budget:</b>	✘
<b>Lead Unit:</b>	061000:Aeronautics and Astronautics						
<b>Title:</b>	Developing a new spaceship						
<b>Start Date:</b>	01-Jan-2006	<b>End Date:</b>	31-Dec-2009				

**Figure 1. Showing completed *Title*, *Start* and *End Date* fields. Note the *Proposal No* field indicates the unique number for this proposal.**


4. In the *Proposal Type* field, select the appropriate value from the dropdown list. If you know the value, you can enter the first character or two until the correct value shows up in the field.
5. For a continuation, renewal, competing/non-competing continuation, or supplement, use the search tool to find the Coeus award number (this is not the MIT account number) in the *Award No* field. For **New** and **Revision** Proposal Types, leave this field blank.

This number must be correct (including hyphens and spaces) so use the search function to find the award. Click on the Search button  next to the field to display the search window, where you can locate by searching by the MIT Account number or other detail.

6. In the *Activity Type* field, select the value from the dropdown list, or type the first character or two to select the value (for example, type **O** for “**Organized Research**”). The value selected here will determine the overhead rates, so it is very important to select the correct activity type. The following values are valid:
7. Select the NSF Code from the dropdown menu in the *NSF Code* field. Select this code for all sponsors, not just NSF.


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When MIT reports annually to the Federal Government about the research conducted on campus, these categories are used in the reporting, so it is important that you are accurate when selecting this code. Always confirm the code with your Principal Investigator or Department Head.

8. In the *Sponsor* field, enter the 6-digit code for the sponsor to whom you are applying for the award. If you know the code for the sponsor, you can type it in, including any leading zeros; otherwise, click on the Search button  next to the *Sponsor* field to display the search window from which you can search for the sponsor by alternative criteria.

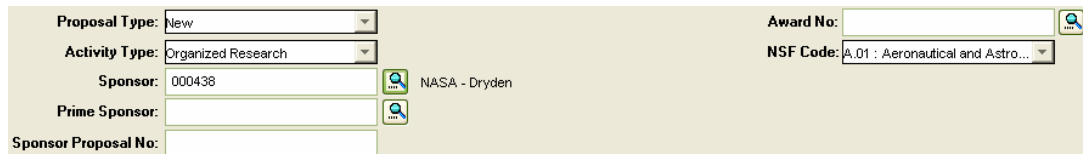


**NOTE:** The entity that should be entered in the *Sponsor* field is the entity that is providing funds to MIT. This means that if MIT will be a subcontractor for the proposal, then the institute to whom you are submitting your proposal to is your sponsor. The prime sponsor is the agency providing the funds to your sponsor.

9. If MIT is a subcontractor for this proposal, enter the 6-digit code for the award entity for this account in the *Prime Sponsor* field. As with the *Sponsor* field, if you know the code for the prime sponsor, you can type it in, including any leading zeros; otherwise click the search button  next to the *Prime Sponsor* field and search by alternative criteria.

If MIT is not a subcontractor, leave this field blank.

10. Leave the *Sponsor Proposal No* field blank. This will be updated electronically in Grants.gov submissions once the sponsor acknowledges receipt of the proposal.



The screenshot shows a form with the following fields and values:

Proposal Type:	New	Award No.:	
Activity Type:	Organized Research	NSF Code:	A.01 : Aeronautical and Astro...
Sponsor:	000438		
Prime Sponsor:			
Sponsor Proposal No.:			

Below the Sponsor field, there is a search icon and the text "NASA - Dryden".

**Figure 2. Showing *Proposal Type*, *Activity Type*, *NSF Code* and *Sponsor Code*.**

11. Identify the source of the notice of opportunity by selecting a value from the dropdown menu in the *Notice of Opportunity* field.
12. If MIT will issue a subcontract(s) for this proposal, check the Subcontract checkbox; otherwise, leave it unchecked.
13. If there is a program title provided by the sponsor, enter it in the *Program Title* Field; however, if you plan to submit your proposal via Grants.gov; any information that you put in this field will be automatically overwritten when you enter and apply a CFDA Number to your proposal.

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- The Agency Program Code should be filled in if it is required for your opportunity. Locate the number in the announcement of opportunity from the Grants.gov or sponsor website.



**NOTE:** Agency Program and Division Codes are only currently required for NSF submissions, but may be used by other agencies in the future. This information is available at:

<https://www.fastlane.nsf.gov/pgmannounce.jsp>

- The Agency Div Code should be filled in if it is required for your opportunity. Locate the number in the announcement of opportunity from the Grants.gov or sponsor website.

Program Title:	Office of Nuclear Physics Outstanding Junior Investigator Program		
Notice Of Opportunity:	Federal Solicitation	Other Agency <input type="checkbox"/>	Subcontract <input checked="" type="checkbox"/>
Program No:	DE-FG01-05ER05-24	Cfda No:	81.049
Agency Program Code:		Agency Div Code:	

**Figure 3. Showing Notice of Opportunity & CFDA No fields as well as Program Title & Program No fields that filled automatically. Also, note the checked Subcontract box.**

### CFDA Number and Program Number

The *CFDA No.* field connects your proposal to the Grants.gov system, and the CFDA number is MANDATORY for full electronic submissions from Coeus to Grants.gov. You must use the correct CFDA Number for your proposal in order to submit the proposal via Grants.gov.

- Go to “Special Instructions for Grants.gov Submissions,” on page 67 to obtain a CFDA Number and confirm that your proposal can be submitted electronically via Grants.gov.
- If the program you are applying to has a Program Number provided by the sponsor, enter it in the *Program No* field, unless it was populated automatically when you entered the CFDA Number (above).
- When you apply a CFDA Number to your proposal, and it passes the Grants.gov validation checks, your proposal will display the Grants.gov logo, indicating that your proposal is set up to be submitted via Grants.gov.

Notice Of Opportunity:	Federal Solicitation		Subcontract <input type="checkbox"/>
Program No:	DE-FG02-06ER06-10		Cfda No: 81.049
Agency Program Code:			Agency Div Code:

**Figure 4. The Grants.gov logo displays when the proposal has been connected to the Grants.gov system.**

## Disassociating the Proposal from a CFDA # and Agency Program Code

You may have selected the wrong Opportunity and would like to apply a different CFDA Number to this proposal, or you may want simply to disassociate your proposal from this particular CFDA Number, in any case, the solution is simple.

### ➡ To disassociate the proposal from a CFDA #:

1. Highlight any data in the *Program No.* field, and delete the data by pressing the <Delete> key.
2. Highlight any data in the *CFDA No* field, and delete the data by pressing the <Delete> key.
3. Save your proposal. This disassociates the proposal from the CFDA Number and you will not be able to submit your proposal via Grants.gov until you reapply a CFDA and Program Number to your proposal (for further details, see “Apply the CFDA Number to Your Proposal” on page 68.)

## The Organization Panel

The Organization panel under the |**Organization**| tab is where you will find the official MIT authorization address for the proposal, as well as most of the sponsor-requested organizational data, such as the DUNS #. Click on **Massachusetts Institute of Technology** in the *Organization* field to view all the details. The Organization and Performing Organization will default to MIT along with the contact information for the Director of the Office of Sponsored Programs.

This information does not require edits for most proposals, but NIH requires that you indicate additional performing sites for this project, which could include subcontractor locations (for example: Whitehead Institute, Harvard University, Mass General, etc.).

### ➡ To add an additional location of performance for this project:

1. Click the [**Add Loc**] button to add a new location.
2. An empty location name field will append to the right, below **Massachusetts Institute of Technology**. Your cursor will automatically appear in this new field, so type the name of the location (such as **Harvard University**). If you click outside the field, double click back inside the field to continue typing.
3. Click the [**Find Addr**] button to find the address for this new location.

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4. The Rolodex Search window will pop up. Search for the specific name and address for the additional location in the Rolodex. Select the row for that address, and click the [OK] button.

If you cannot find the contact person you are looking for, you can add their name to the Rolodex to use on the proposal. For instructions on how to do so, go to “Adding a Name to the Rolodex” on page 71, perform the operation, and then [Find Addr] for the name that you just added.

5. Repeat the above steps for additional locations.
6. If you would like to delete a location (except the main location of **Massachusetts Institute of Technology**), click on the row of the location to highlight it, and then click the [Delete Loc] button.

### The Mailing Info Panel

The Mailing Info panel under the |Mailing Info| tab is where you enter the deadline date by which time the proposal must be received by the sponsor. This date is used during electronic approval routing to assist priority indications in the Inboxes of the approvers. Approval, rejection, and notification lines in the Inbox are colorized by priority. (See “Managing Your Coeus Inbox and Sending Notifications,” on page 74 for more information on the Inbox.)

#### ➡ To add the submission date & details:

1. Click on the |Mailing Info| tab to display the Mailing Info panel of the Proposal window.
2. In the *Date* field of the *Deadline* area, enter the date when the sponsor must have received the proposal. Use the *M/D/YY* format, as in **8/1/05**.




***Tip!** Add the deadline date to make sure that your proposal is given due priority when you submit it electronically. Be sure to indicate if the date is a postmark date or receipt date.*

3. Select the appropriate checkbox to indicate whether the date is a postmark date or is the date by which the sponsor must receive the proposal.
4. In the *Mail By* field check the box that indicates which department will be submitting the proposal, your department or OSP.
5. In the *Type* field, indicate the carrier that will deliver the proposal. (Regular indicates US Mail)
6. In the *No Of Copies* field, enter the number of copies of the proposal that will need to be submitted.

7. The *Mail Account*, *Carrier Code*, and *Carrier Code Type* fields are not used by MIT at this time.

### ➡ To populate the mailing address:

**NOTE:** Physical mailing address information inserted in the Mailing Info panel is not used by Coeus to process a proposal.

1. On the Mailing Info panel on the Proposal window, click on the search button  next to the Mailing Address field. This displays the Rolodex Search window.



**Tip!** Coeus uses the asterisk (\*) as the keyboard character that represents the wildcard. An asterisk can stand in for any string of characters that you may not be sure of. For example, if you are looking for *Massachusetts*, you can search for **Mass\*** and get all values that begin with “Mass”.

2. If you know the last name of the contact person, you can enter all or part of the name in the *Last Name* field, using Wildcards (\*) if you desire.

If you don't know the last name of the contact person, you can search for all Rolodex entries for the sponsor and select the desired contact person from the resulting list. To do this, scroll the Query window to the right to find the *Organization* column, and enter all or part of the organization name, using Wildcards as necessary.

3. Click [**Find**] to retrieve all the Rolodex entries that match your criteria.
4. Highlight the line that contains the name you want in the result list, and click [**OK**] to select that name. The name and address information will be displayed in the Mailing Info panel.

If you cannot find the contact you are looking for, you can add it to the Rolodex to use on this proposal. For instructions on how to do so, go to Adding a Name to the Rolodex on page 71, perform the operation, and then re-search for the name that you just added.

### The Investigator Panel

The Investigator panel under the |**Investigator**| tab is where you identify the faculty member or senior researcher who is the Principle Investigator (PI) of the proposal as well as any additional Co-Investigators. Only one individual may be designated as the PI, but additional co-Is may be listed. For fellowship proposals, the faculty member should be listed as the PI, and the student or fellow should be listed as co-I.

You must also designate the Lead Unit to the PI and certify all the investigators. Designating the Lead Unit is important for approval routing;

## COEUS 4.1.1 – Proposal Development

also, you will not be able to submit the proposal if the certifications are not done for the investigators.

### ➔ To list all investigators:

1. Click on the |**Investigator**| tab to display the Investigator panel, which will be blank unless this is a department template.
2. Click on the [**Find Person**] button to display the Rolodex search window.
3. In the *Full Name* field, enter a search value. The most useful search value is **\*lastname\***, where lastname is all or part of the person's last name.

If you cannot find the name you are looking for, you can add it to the Rolodex to use on this proposal. For instructions on how to do so, go to Adding a Name to the Rolodex on page 71, perform the operation, and then re-search for the name that you just added.

4. Click on the [**Find**] button to search for the value.
5. When the search result is returned, locate the row that contains the name you are looking for and click in that row to highlight it.
6. Click [**OK**] or press the Enter key to return to the Investigator panel. The investigator will be displayed in the panel.



**Tip!** If you have multiple investigators, you can search for all of them at the same time. Enter **\*lastname\*** for the first investigator's last name in the first row of the *Full Name* field. Then <down arrow> and enter the next investigator, continuing for all investigators: Once you've entered all the names, click [**Find**]. When the search results come up, use <CTRL>+Click to select each valid name. All the selected names will populate the Investigator panel.

Person Search		Person Search Result	
Last Name	First Name	Full Name	Use
		*smith*	
		*lee*	
		*tombella*	

7. Leave the % *Effort* field blank. This field is not appropriate for use at MIT.
8. The PI checkbox is checked by default for the first person added on this panel. If the person is the primary investigator, leave it checked. If multiple investigators are listed, only one can be check marked as *PI*. All projects must have a PI; be sure to click the PI checkbox that appears next to the Principle Investigator for the project.
9. If you need to add any other investigators, repeat Steps 2 – 8.

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Person Name	% Effort	PI	Faculty
Nunez, Patricia I	.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wang, Xiao-Minh	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Lead	Number	Name
<input checked="" type="checkbox"/>	061000	Aeronautics and Astronautics

Buttons: Add, Delete, Find Rolodex, Find Person, Certify, Add Unit, Delete Unit, Find Unit

Figure 5. Showing Investigators added, PI designated and Lead Unit designated.

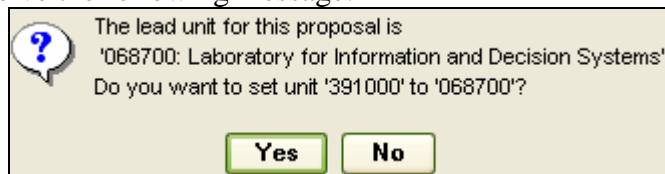
### ➔ Indicate the Lead Unit:

No matter what the PI's home unit, the proposal you create can only be in one of your authorized units. Remember, if you have multiple units, you had to select one at the beginning of the proposal development process, and this unit must be the lead unit for this proposal. Therefore, the lead unit may need to be changed for the PI. You do not need to check the lead unit checkbox for co-investigators, but you may change their unit, if appropriate for routing purposes.

1. Click on the PI's name to select it. Notice that the Lead Unit field displays the corresponding data for the selected investigator.
2. Check the Lead checkbox for the PI.

There are two possible outcomes for this situation. If the PI is in your unit, you can check the box and move on to the certifications; however, it is possible that the PI's home unit is outside of your unit, in which case you will have to change the PI's unit number.

If you receive the following message:



Click the [Yes] button and Coeus will change the unit number for you. If you click [NO] this proposal cannot proceed with this PI as Lead. Select another PI in your home unit, start a new proposal in the correct unit.

➡ **To Designate an Investigator Credit Split:**

Some background work must be done when Coeus is installed at your institution to customize the Credit Split feature. Once the background work is done, you will be able to designate ways to split the Investigator’s credit that best fits your institution.

The Credit Split feature splits the credit for the investigators A) for this proposal, and B) of that percentage, the credit is then split between the investigator’s respective units.



**MIT Users:** This function is not used at MIT.

1. Be sure that all investigators are added to the *Investigator Panel* list. Be sure that for each investigator, all their respective units have been listed.
2. Click the [**Credit Split**] button to open the Investigator Credit Split window.
3. Your institute will have a set of “recognition” columns that you have set up to designate what the credit split affects. For this manual, we will use one column designated *Recognition*.
4. Click in the *Recognition* column on the investigator’s name row (colored dark gray) and set the percent credit for THIS PROPOSAL. Do this for each investigator.

The total for all the investigators is indicated in the *Investigator Total* row, and MUST equal 100%.

5. Of their % credit for the proposal, divide the % credit between each of the investigators’ respective units. Click in the *Recognition* column on a unit’s row (colored white) and set the appropriate percentage.

Each investigator has a row labeled *Unit Total* (colored medium gray), which totals all the credit designated to their units. Each investigator’s unit total MUST equal 100%.

Investigator Credit Split	
	Recognition
Shavell, Eleanor	45.0
068700 - Laboratory for Information and Decisi...	100.0
<b>Unit Total</b>	<b>100.0</b>
Dowdy, Stephen D (PI)	55.0
000001 - Massachusetts Institute of Technology	70.0
068700 - Laboratory for Information and Decisi...	30.0
<b>Unit Total</b>	<b>100.0</b>
<b>Investigator Total</b>	<b>100.0</b>

**Figure 6. Showing the Investigator Credit Split window. Note the Investigator Total for this proposal equals 100%, and the Unit Totals for each investigator equals 100%.**

- When all of the credits have been set, click the [OK] button to close the window.

## The Key Person Panel

The Key Person panel under the |Key Person| tab is where you indicate the key people on the project—those named contributors in significant roles.



**NOTE:** It is very important that you DO NOT add Investigators as Key Persons. Never duplicate your entries. Key Persons are individuals who are integral to the project, but are NOT Investigators. This is an important distinction.

### ➡ To complete the Key Person panel:

- Click on the |Key Person| tab to display the Key Person panel. As in the Investigator panel, it will be blank when it is first displayed.
- Click on the [Find Person] button to display the Rolodex search window.
- Enter the search criteria for the Key Person, and click [Find]. When the search result window is displayed, locate and highlight the desired person.

If you cannot find the contact you are looking for, you can add it to the Rolodex to use on this proposal. For instructions on how to do so, go to Adding a Name to the Rolodex on page 71, perform the operation, and then re-search for the name that you just added.

- Click on the [OK] button or press the <Enter> key to add the individual to your list of Key Persons.
- Repeat this for all the key persons on your list.

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6. When you have added all the key people, enter the following for each person:
  - a. In the *Role* field, type the role that the person will be assigned for the proposed project.
  - b. The *% Effort* field is currently not appropriate for MIT use.

The exception to this rule is if you are planning to print the Form 398 for proposal, you should enter **999.00** in the *% Effort* field to designate the person as an Other Significant Contributor, which will print onto page two of the form. This is a workaround for the Form 398 only.

7. If the person is a faculty member, the checkbox under *Faculty* will already be checked.


Name	Role	% Effort	Faculty
 Yagelski, Jacob Pierce	Project Coordinator	.00	<input checked="" type="checkbox"/>



Figure 7. Showing Key Person with designated Role, % Effort and Faculty status.

### Upload Biosketch and Current & Pending

The Biosketch and the Current & Pending documents are often required for all Investigators and Key Persons, but should be confirmed in your announcement of opportunity. You should update the Biosketches (also known as a Curriculum Vita) and Current & Pending research, and save in either Microsoft Word or Adobe PDF formats. Coeus will transmit either file format, opting first for PDF if available. Please be sure to check the required format for your opportunity and upload the appropriate format.

Many sponsors require a specific number of pages for the Biosketch and Current & Pending, so it is recommended that you save these documents in the PDF format, which will guarantee that the document opens for the sponsor exactly as you prepared it.

#### ➡ To Upload the Biosketch and Current & Pending files:

1. Click on the Proposal Persons button  to open the Proposal Personnel window. This window will compile a list the individuals you entered on the **|Investigators|** and **|Key Persons|** tabs.
2. Click on the first name to highlight it.
3. Click on the Add Module button  to insert a new module line for the highlighted name.

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An empty module line will appear at the bottom of the screen, with a blinking cursor.

4. Type either **biosketch** or **currentpending** as the description of the module in the field.

You must type **biosketch** in the *description* field where you will be uploading the biosketch, and you must type **currentpending** in the *description* field where you will be uploading the current & pending.





**NOTE:** You must write the description exactly as directed above – this is the current Grants.gov naming scheme. When your proposal is transmitted to Grants.gov, your uploaded file names must be identical to the required file names in order to pass the validation checks.

5. To upload the file, you will search your computer/network for the file. To bring up a search window and locate your Adobe PDF file, click the Upload PDF File button .
6. From the search window, browse to your file, and then click on the filename to highlight it. Next, click the [Open] button. This will upload the document to your proposal, and you will see the icon for the file type appear on the module line. You can double-click on the icon at any time to view the document.
7. Repeat steps 2-6 for every Investigator and Key Person on the project uploading both a Biosketch and Current & Pending for each.

Remember to highlight the name of the person for whom you are uploading files before you click the Add Module button.

Full Name	Title
Nunez, Patricia I	
Wang, Xiao-Minh	
Yagelski, Jacob Pierce	



  


Description	
<input type="checkbox"/>	 biosketch
<input type="checkbox"/>	 currentpending

**Figure 8. Showing the uploaded biosketch and currentpending files for Patricia Nunez.**

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8. If you have more than one person displayed on this panel, you should sort the names so that the PI is at the top. Certain forms print in the order that the proposal persons are sorted, so the PI must be at the top.

To do so, use the Move Up or Move Down arrow buttons   to move a highlighted name up or down in the order.

9. When you have finished uploading the files for all individuals, click the Save button . Then, close the window (**File > Close**) to return to the Proposal Details window.

### The *Special Review Panel*

This panel identifies research that requires special review or approval such as work with human subjects or recombinant DNA.


#### To add special review details:

1. Click the [**Add**] button. This will insert a line in which you can enter a special review.



*Tip!* Coeus will not allow a blank line on the *Special Review panel*. You must delete any lines that will not designate a special review type. To do so, click in the blank line to highlight it and then click the [**Delete**] button.

2. In the *Special Review* field, select from the dropdown menu a category for special review.
3. In the *Approval* field, select from the dropdown menu a current approval status.
4. If you have been given a protocol number, enter the number in the *Protocol* field.
5. If you have applied for approval, enter the date you applied for approval in the *Appl. Date* field.
6. If you have been granted approval, enter the date that you were granted approval in the *Appr. Date* field.
7. If you would like to enter comments, use the *Special Review Comments* field.

Special Reviews					
	Special Review	Approval	Protocol No.	Appl. Date	Appr. Date
	Human Subjects	Pending	654654	01-Dec-2005	

**Figure 9. Showing the Special Review item Human Subjects with known data supplied for that line item.**

➡ **Update a Special Review line:**

1. If you need to make an update to a special review status, simply click the line that you would like to update to highlight it.
2. You can then change the details in any of the fields. If you are updating comments, double check to be sure that you have clicked the correct special review line before entering the comments.


**The *Science Code Panel***

This is not currently used at MIT.

***Save the Proposal***

It is a good idea to frequently save the proposal so that you don't accidentally lose your work.

➡ **To save your proposal:**

1. Click the Save button , or select **File > Save** from the menu.

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## Creating a Proposal Budget

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You can create an initial budget that includes the periods of performance, the personnel and cost elements. Coeus will automatically calculate inflation and salary increases as well as overhead. Once you have created an initial budget, you may want to make a copy of it which you can modify. You can create as many versions as necessary; that way, you can make copies and tweak each of them to suit the needs of your proposal, changing the cost elements, personnel, etc.

Once you've decided on a budget that you like, you can designate it as the "Final Budget." However, even final budgets can change, so you can always undesignate a budget from final, and rework it or select another existing copy to be the final.

### ***Beginning the Budget***

There are two places from which you can open the budget. You can either open it from the Proposal Details window, or from the Proposal List page.

#### **➡ To open the Budget Window from Proposal Details:**

1. Click the Proposal Budget button . This will open the Select Budget window.
2. Click the [New] button. This will bring you to the Create Budget for Proposal window.

#### **➡ To open the Budget Window from Proposal List**


1. Highlight the proposal you wish to work on
2. From the menu, go to **Edit > Budget**

Notice that this budget is labeled as version 1. If you were adding a budget to a proposal that already had one or more draft budgets, the version number would be incremented to the next number. For example, if the proposal already had 2 draft budgets, the version number on a new budget would be 3. See "Copying the Budget to Create a New Version," on page 41, for more information.

### **Completing the Summary panel**

The Summary panel, under the |**Summary**| tab, shows the summary information about the budget, including the proposal dates, the cost limit, and the overhead rate type for the project.

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The bottom half of the panel shows the summary information for each period covered by the proposal, including the period dates, the total cost for the period, the direct and indirect costs, the Cost Sharing amount, and any underrecovery costs for the period. These values are connected to the equivalent values on the Period panels. This means that you can enter a value in these fields and it will be carried over to the Period panel. If you change the value in the Period panel, the value will be changed here as well. However, to show the correct results of calculated fields here, you must click on the Calculate Budget button .

### ➡ To complete the *Summary* panel:

1. The start and end dates are applied from the Proposal Details window. It is advisable to verify the start and end dates of your proposal before proceeding. If you need to adjust the start or end dates, close the budget, return to the Proposal Details module and make and save the changes, then re-open the budget module.
2. If the proposal is for a continuation or renewal, and there are residual funds from the previous award, enter the amount in the *Residual Funds* field. Do not enter comma separators; Coeus will add them for you.
3. If you want to limit the costs in your proposal, enter the maximum cost (including indirect costs) to be covered by the total award in the *Total Cost Limit* field. Do not enter comma separators; Coeus will add them for you.



**NOTE:** The *Total Cost Limit* field is an optional field. If you enter a value in this field, Coeus will warn you when you save the budget if your total exceeds the value that you have entered. The *Total Cost Limit* feature does not limit the budget or warn you while you are in the process of creating the budget.

4. The *OH Rate Type* field describes the overhead (Facilities and Administration, or F&A) rate type. This is selected automatically based on the activity type entered in the Proposal Development window. Verify that it is correct, and if necessary, select the appropriate value from the dropdown list.



**Tip!** If you change the Activity Type field in the Proposal Development window, or you change the OH Rate Type field here on the Create Budget window, you will get a message (for changes to the Proposal Development window, the message will appear when you open the budget) that you should recalculate, since this will change your indirect costs. Since you will be calculating the budget again anyway, you can click the [Yes] button to proceed.


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5. Comments entered in the *Comments* field are viewable only to the user. These comments are most helpful to distinguish between different versions of your budget (Example, **2 Postdocs, 3 RA's** on one version vs. **No Postdocs, 4 RA's** on another).

### Sync the Proposal Rates to the Institute Rates


To be sure that your proposal is using the most up-to-date indirect and inflation rates, you must synchronize (sync) your proposal rates table to the Institute rate table. If you are using a copied proposal, this action is imperative. If you started a new proposal, the rates should be valid. **You should sync your proposal rates to the Institute rates prior to any manual adjustments any of the rates** (see below), otherwise your adjustments will be overwritten and lost when the Institute rates are applied.

#### ➡ To Sync the proposal rates to the Institute rates:

1. Click on the Rate button  to open the Modify Rates for Proposal window.
2. Click the [**Sync**] button to sync the rates.
3. A popup dialogue box will ask you if you wish to sync the rates. Click [**Yes**] to do so.
4. Now that you have the most up-to-date rates applied, you may want to make some adjustments to the rates. See below to do so.

### Adjust the Rates to be Applied to the Proposal

If you need to change the rates for this proposal, you can do it on this window. Be sure you change the rates for every fiscal year of the budget, not just the first one.


1. Click on the Rate button  to open the window.
2. Make any changes necessary by clicking in the *Applicable Rate* field at the right of any line item and entering the revised number.
3. When you have changed the rates to your liking, click [**OK**]. Answer, [**Yes**] to the question that you want the budget to recalculate.
4. If you make a mistake, you can click the [**Cancel**] button and answer, [**No**], do not save changes. Or, if you make a change and save but later want to return to the default rates, you can return to the standard rates set by the Institute by clicking on the [**Reset**] button. Answer [**Yes**] to the question popup box that asks if you wish to disregard the entries that you've made.

## Creating the Budget Persons List

Since several line items in your budget will involve salaries for faculty and staff, you will need to add the people who will be paid out of the award funds to the proposal. This is done in the Budget Persons window. You will add all named personnel in the proposal to this screen. Any investigators you added to the proposal under the **|Investigators|** tab and the key persons that you added under the **|Key Persons|** tab will automatically populate the Budget Persons list. You can add any additional personnel as necessary.

The Budget Persons window can be thought of as a shopping list of personnel, including the salaries you insert for them, from which you will select and add to the appropriate budget line items. Coeus will inflate for annual salary increases and then calculate direct and indirect costs based on the dates of performance and % of effort.

### ➡ To add personnel to the Budget Persons list:

1. Navigate to **Edit > Persons**, or click on the Budget Persons... button . This will display the Budget Persons window. The list of Investigators and Key Persons that you created in Proposal Details will automatically append here. If you need to add more names to the list, do the following:
  - a. Click on the **[Search]** button to display the Select Person dialog box.
  - b. Enter the selection criteria. Remember that you can search for multiple names by adding search criteria (i.e. last name) to multiple rows.
  - c. Click the **[Find]** button.
  - d. Click on the desired person (or persons by <Ctrl>+Clicking) to highlight the row(s). Then click the **[OK]** button. Repeat the steps a – d if you need to add additional names.

Notice that the Job Code has been automatically pulled in from HR for each person. If this field is empty, you can insert characters in the *Job Code* field; however, you cannot have a job code serve for two different kinds of TBA Names (see below). It is suggested that you use **TBA1**, **TBA2**, etc. to distinguish between any TBA Names. This data is not currently being used in Institute transmissions, and will be automatically adjusted in a future version of Coeus.



**Tip!** You are building a shopping list of personnel and their salaries that you can select from. Individuals are only added to your budget when you select them, not when you add them to the Budget Persons window. This means that you can add names to the Budget Persons window now if you think that they might be used later, even if they may never be used in the

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*present proposal.*

2. For each person, you will now need to complete the following:
  - a. The Appointment Type should also pull in from the HR data to the *Appointment Type* field. Be sure that this is the correct type for your proposal. If you need to make a change, select the appropriate appointment type from the dropdown list in the *Appointment Type* field.
 

The “M” refers to months of appointment; thus, a professor with a 9 month appointment (academic appointment) will have the **9M DURATION Appointment Type**. **REG EMPLOYEE** refers to a Regular Employee, **SUM EMPLOYEE** refers to a Summer Appointment, and **TMP EMPLOYEE** refers to a Temporary Appointment.
  - b. Enter the person’s current annual salary as of the date of the last salary increase in the *Calc Base* field. Enter the salary without using any commas; for example, **45000**.
  - c. In the *Eff Date* field, set the Effective Date for the salary increase to the date of the employee’s annual increase effective date. The effective date automatically defaults to the start date of your proposal period. For the most accurate salary inflation, change the date to match the date of that employee’s increase as mentioned above.

Name	Job Code	Appointment Type	Eff Date	Calc Base
Nunez, Patricia I	00000	9M DURATION	01-Jan-2006	\$110,300.00
Wang, Xiao-Minh	00000	9M DURATION	01-Jan-2006	\$80,270.00
Yagelski, Jacob Pierce	00000	REG EMPLOYEE	01-Jul-2005	\$95,095.00
TBA - Post-Doc	TBA	REG EMPLOYEE	01-Jan-2006	\$50,000.00

**Figure 10. Showing Budget Persons window with names, Job Codes, Appointment Types, Effective Dates and Base Salaries as of the Effective Dates. Note the TBA Post-Doc.**

3. Use some of the many “TBA-...” (to be announced) personnel categories as placeholders for new hires or participants that do not need to be named. Review the full list available by inserting \*TBA\* in the last name budget persons search screen.
4. When all fields are correct, click the [OK] button. This will return you to the Proposal Summary Panel.

### Adjusting Period Boundaries

Adjusting Period Boundaries changes the dates of the periods in your budget. This tool allows you to create a budget with the basic start and end dates and then realign your period dates to display the budget in different fiscal formats.

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For example, you can change from the default period dates to the calendar year format, the Institute’s fiscal year, or to the Government’s fiscal year. Adjusting boundaries is usually required when you copy an older proposal for resubmittal, in order to synchronize the start and end dates of the budget with the new proposal details. See the section on **Revising Existing Proposals** on page (forthcoming).



**NOTE:** Changing the period start or end dates will change all the corresponding dates for the line items in that period.

### ➡ To change the period date boundaries for the budget:

1. With the Budget Summary panel displayed, if appropriate, insert the new **Start Date** in the start date field and the new **End Date** in the end date field. (The start date may not change, but aligning a budget to government fiscal year may alter the ending date.)
2. Select **Budget Periods > Adjust Period Boundaries...** from the menu bar. This will display the Define Periods window.
3. Click on the field you want to change and type the new date.



**Tip!** If you have changed a date, and want Coeus to default to 12 month budget periods based on the entire budget start and end dates, click the **[Default]** button.

4. If you need additional budget periods, click the **[Add]** button and type in the start and end dates for that period.
5. If you want to insert a period between to existing periods, click the **[Insert]** button, then type in the start and end dates.

### **Creating the Period 1 Budget**

Budgets are created by period. You will create a period 1 budget that you will populate with line items that will appear in every period of your budget. Coeus will use Period 1 as a base to inflate for future periods. Finally, you will tweak any individual period, adding, removing or revising line item values, to complete your budget.

Once you’ve created a base budget, you can copy it and tweak it. You can perform this copy/adjustment function any number of times, adjusting even the period dates so that you can convert to institutional, calendar, or government fiscal years, as needed until you pick a final budget to be submitted with your proposal.


➡ **To go to Period 1 of the budget:**

1. Click on the |**Period 1**| tab. This will bring you to period 1. Once you have completed all of the period 1 line items and have generated all additional periods, every period will have its own tab so that you can easily navigate between them.

## Adding Personnel Line Items

Once the personnel are assigned to the project, you can add the salary line items to the period 1 budget. Some sponsors require you to name all personnel, while others do not. You must name the PI, and participating Faculty. PI's, Co-I's, and Key Personnel added in the Proposal Detail module will automatically load into your Budget Persons table. It is not usually necessary to name the personnel for the following salary line items: Research Assistants (Graduate Students), Postdocs, Administrative staff, MIT Student (undergrads), Hourly Personnel, Temporary Help, etc.


➡ **To add salary line items to the budget:**

1. Click the Add Line Item button  to add a line item. A blank line item will display, highlighted in yellow.



***Tip!** You can use the keyboard shortcut <Ctrl> + <A> (or <Command> + <A> for Mac users) to add a line item without having to use the mouse. This can be a big timesaver since you will be adding many line items per budget.*

2. Double click on the *CE* field to display the list of Cost Elements.
3. Select from the list your first salary cost element and click [OK]. This returns you to the Period 1 panel with the selected cost element displayed on the line.

Click on the Personnel Budget for Line Item button  to display the Personnel Budget Details window.

4. Click on the [Add] button to display the Select Budget Persons window.
5. Select from the list the people whose salaries to be applied this line item, and then click [OK] to return to the Personnel Budget Details window.

You can select multiple names per line item if those individuals fall under the same category; for example, you can select 3 Faculty PI's who are all to be budgeted for summer salaries if the line item is **Summer Faculty – On.**

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**NOTE:** You may need to add a person to multiple line items. For example, a Sponsored Research Staff working on this project for an entire year will need to be added once 50% effort for 9 months and again for 75% effort for the remaining 3 months of the budget period.

6. On the Personnel Budget Details window, a line is displayed for each person selected.

The Salary will be calculated using the salary entered on the Budget Persons window, the period dates will automatically append along with rate information, etc.

7. Check and adjust if necessary the *Start Date* and *End Date* fields for each individual's row. The default dates are the same as the period dates; however, this should be adjusted for Faculty summer effort and Staff vacation effort reduction. For example; a faculty summer effort should be adjusted to the appropriate summer months of June, July and August. Thus, the period dates are from 6/1/05 to 7/31/06, would accurately express 2 months summer effort.
  - a. Important: Vacation reduction must be reflected in the start and end dates of the Personnel Budget Detail. % effort is measured in working months, so if a participant has 4 weeks of vacation/ year, they will only devote 100% effort to 12 months of that year. Use the Start and End Dates to exclude the number of weeks per budget period that the participant is eligible for vacation.



**Tip!** *If the person is starting partway through the first period but will work continuously through the remaining periods, you should set up the person's Start and End Dates to be the full length of the period. Once you have completed your budget Period 1 and have generated the remaining periods, you can go back to Period 1 and adjust the dates for this person as needed. Otherwise, if you show the later Start Date in Period 1, all the periods generated afterward will show the late start date, and you will have to change all the subsequent periods individually.*

8. Enter the employment appointment type from the dropdown menu:

<b>Academic</b>	This is the 9 month academic year, from September 1 through May 31.
<b>Calendar</b>	This is the 12 month calendar year.
<b>Cycle</b>	Same as Calendar – 12 months.
<b>Summer</b>	The Summer period is the 3 months not covered by the Academic period; it extends from June 1 through August 31.

9. Enter the percentage of the person's salary to be charged to the project in the *% Charged* field. This value cannot be greater than the *% Effort* value.

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When you enter a value in the *% Charged* field, the Salary will be calculated and will appear automatically in the *Salary* field.

For faculty, enter the personnel budget details for the Summer period by selecting the **Summer** period and entering the exact start and end dates. Then set the *% Charged* field to **100%**. For example, if a faculty member is working for the month of July, you would enter **Summer, July 1 to July 31, 100%**.

- Enter the percentage of the person's time to be charged to the project in the *% Effort* field.



**NOTE:** If the *% Effort* is greater than the *% Charged*, Cost Sharing will be generated when the [**Calculate**] button is clicked. If the sponsor does not specifically require Cost Sharing for this project, the *% Charged* and *% Effort* fields should be the same.



**Tip!** If you forgot to enter the salaries on the Budget Persons window, the amount will appear here as **0.00**. To fix the salary in the Budget Persons window, click the [**persons**] button to display the Budget Persons window and then enter the salary/ies. Then Click [**OK**] to return the Personnel Budget Details window and click [**Calculate**] to apply the new salaries.

<b>Cost Elm.:</b>	400005	Summer Faculty - On	<b>Start Date:</b>	01-Jan-2006	<b>End Date:</b>	31-Dec-2006	<b>OK</b>
<b>Desc.:</b>	Nunez, Wang, Yagelski						<b>Cancel</b>
<b>Cost:</b>	\$76,918.41	<b>Underrecovery:</b>	\$ .00	<b>Cost Share:</b>	\$ .00	<b>Quantity:</b>	3
							<b>Add</b>
							<b>Delete</b>
							<b>Details</b>
							<b>Calculate</b>
							<b>Persons</b>

Name	Job Code	Start Date	End Date	Period	% Charged	% Effort	Salary
Nunez, Patricia I	00000	01-Jun-2006	31-Aug-2006	SP	100.00	100.00	\$37,502.00
Wang, Xiao-Minh	00000	01-Jun-2006	31-Aug-2006	SP	100.00	100.00	\$27,291.80
Yagelski, Jacob Pierce	00000	01-Jun-2006	31-Aug-2006	SP	50.00	50.00	\$12,124.61

**Figure 11. Showing the Personnel Budget Details window with 3 faculty summer salaries. Note the start and end dates are for summer only, and the 100% charged & % effort calculate the appropriate portion of salary for that period.**

- Repeat Steps 8 through 11 for each Personnel Budget Detail line.
- When the values are entered on all the Personnel Detail lines, click the [**Calculate**] button to see the totals that will appear for the line item at the bottom of the window.
- When you are satisfied with the results, click the [**OK**] button to return to the Period 1 panel. Notice that the cost on the line item reflects the calculation for all personnel included in that budget person detail.

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14. For some categories of personnel where names are not required (Students, Post-Doc's, Technicians, etc.), simply type the Quantity and Cost directly in the cells. This allows you to bypass the Personnel Budget for Line Item feature.
15. Double click on the line item to make the following edits:
  - a. Click in the *Description* field and type a description of the line item. This description will be visible on the Period Budget line item, and it will help to remind you what the line item accounts for.
  - b. Leave the Apply Inflation checkbox checked. This ensures that all salaries are automatically increased annually by the Institute-determined rate.
  - c. If you need to justify this budget item, click the [**Justify**] button and type the justification in the *Justification* field that will appear. The *Justification* field will act as notes to assist you as you prepare your full budget justification, which will be uploaded in the Uploading Narratives (see page 55).

The icon at the end of each budget line in the Period budget indicates whether or not a justification has been written for each particular line. You can click on the icon to view the justification if there is one. The icons are:



Justification is present



No justification is present

16. Click the [**OK**] button.

17. Repeat these steps for each line item, if needed.

Line CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date
1 400025	Faculty Salaries Tenured - On	Nunez, Wang	2	\$87,238.71	01-Jan-2006	31-Dec-2006
2 400005	Summer Faculty - On	Nunez, Wang, Yagelski	3	\$76,918.41	01-Jan-2006	31-Dec-2006
3 400040	Faculty Salaries Non-Tenured - On	Yagelski	1	\$48,260.71	01-Jan-2006	31-Dec-2006
4 400390	Post-Doctoral Staff	TBA	1	\$50,000.00	01-Jan-2006	31-Dec-2006

Figure 12. Showing Period 1 personnel line items for this budget. Note the Post-Doc is TBA.


### Adding Line Items for Non-Personnel Budget Items

For non-personnel budget items, you can enter the costs directly on the line item, or on the Line Item Detail window. The following procedure uses domestic travel as a sample line item. The procedure is the same for all non-personnel budget items.

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For Non-Personnel Budget Items you will follow roughly the same protocol when adding line items; however, subcontracts require special protocol. Please read through the subsection entitled “Adding Subcontract Line Items” on page 35

### ➡ To add a non-personnel line item to the budget:

1. Click the Add Line Item button  to add a new line item. The blank line item will be displayed on the Period 1 panel, highlighted in yellow.
2. Double-click the *CE* field and select a Cost Element from the list. Click [OK] or press <Enter> to return to the Period 1 panel. The line will display the selected cost element.



**NOTE:** Major equipment must be budgeted using individual line items for each piece of equipment with a description entered in the *Description* field. This is required for Grants.gov submissions, but it is also good practice for all budgets.

3. Double-click on the *Description* field to open the Budget – Line Item Detail panel.
  - a. Enter a description in the *Description* field. This will be displayed on the Period 1 line item. This is largely for your reference so that you can be sure to itemize all elements.
  - b. In the *Cost* field, enter the total cost for the line item.



**Tip!** *Cost values can be entered to the penny, but are rounded to the nearest dollar value when printed. However, the more precise values are used in calculations.*

- c. Leave the *Quantity* blank, unless you want to record a quantity for your records. This value does not affect the line item cost. (In other words, the *Cost* is not multiplied by the *Quantity* to get a total cost for the line item.
- d. The Apply Inflation checkbox is checked by default; generally, this should not be unchecked.
- e. If the cost of the line item will be paid partially by the award and partially through another source (like the DLC), enter the amount funded by the other source in the *Cost Sharing* field.



**Tip!** *If cost sharing is used, you must identify the unit that will fund the cost. For information on identifying the unit for cost sharing, see “Distributing Cost Sharing Expense,” on page 44.*

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- f. Click on the [**Justify**] button to display the Justification pane of the Budget – Line Item Detail window.
  - g. Enter the justification in the *Justification* field and click [**OK**] to return to the Period 1 panel. You can use these justification notes to assist in creating a full budget justification for your proposal.
4. Repeat this procedure for any non-personnel direct cost line items that will be included in the award.

5	421818	Equipment - Not MTDC	booster rocket	2	\$250,000.00	01-Jan-2006	31-Dec-2006
6	421818	Equipment - Not MTDC	laser	1	\$150,000.00	01-Jan-2006	31-Dec-2006
7	420875	Publication Charges			\$1,500.00	01-Jan-2006	31-Dec-2006
8	420060	Travel - Not MTDC		3	\$6,500.00	01-Jan-2006	31-Dec-2006
9	420104	Animal Purchases	monkeys	4	\$60,000.00	01-Jan-2006	31-Dec-2006
10	420102	Animal Care	monkey care	2	\$25,000.00	01-Jan-2006	31-Dec-2006


**Figure 13. Showing a sample Non-Salary portion of a budget. Note the multiple equipment line items.**

5. Click the Save button , or select **File > Save** from the menu to save your budget.


### Adding Subcontract Line Items

Most subcontracts are subject to F&A for only the first \$25,000 spent. For a subcontract that is \$25,000 or less, you must select the F&A bearing Cost Element. For any subcontract that exceeds the cost of \$25,000, you will have two budget line items: one for \$25,000 that bears F&A, and one for the remaining amount of the subcontract. For NIH proposals with direct cost limitations, use the special GL 420630 Subcontractors F&A (NIH Only) in each budget period to pull the Subcontractor's F&A funds out of your direct costs. For these NIH proposals, you will need 3 line items for period 1 (420600 for the first 25K, 420620 for the rest of the direct costs, and 420630 for the subcontractor's F&A).

#### To add a subcontract to the proposal:

1. Click the Add Line Item button  to add a new line item. The blank line item will be displayed on the Period 1 panel, highlighted in yellow.
2. Double-click the *CE* field and select the **Subcontracts – Subject to F&A** Cost Element from the list. Click [**OK**] or press <Enter> to return to the Period 1 panel. The line will display the selected cost element.
3. Click in the *Description* field for that line item and type the name of the subcontractor for this account.

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4. Click in the *Cost* field and enter the cost of the subject that is subject to F&A up to \$25,000.
5. If the subcontract is for more than \$25,000, add a second line item for that subcontract to account for the difference.
6. Click the Add Line Item button  to add a new line item. The blank line item will be displayed on the Period 1 panel, highlighted in yellow.
7. Double-click the *CE* field and select the **Subcontracts (Contracts) – Not MTDC Cost Element** from the list. Click [OK] or press <Enter> to return to the Period 1 panel. The line will display the selected cost element.
8. Click in the *Description* field for that line item and type the name of the subcontractor for this account as you did above.
9. Click in the *Cost* field and enter the cost of the subject that is subject to F&A up to \$25,000.


11	420600	Subcontracts (first \$25K) - Subject to F&A	Cornell University	1	\$25,000.00	01-Jan-2006	31-Dec-2006
12	420620	Subcontracts (beyond first \$25K) - No F&A	Cornell University	1	\$30,000.00	01-Jan-2006	31-Dec-2006

**Figure 14. Showing a subcontract with Cornell for a total of \$55,000**

### **Generating the Remaining Periods**


When you have completed adding all the Period 1 line items, you are ready to generate the remaining periods. You can only do this once (although you can add and apply single line items to later periods if needed), so be sure you have all the necessary items in Period 1 before generating the remaining periods. Also, it is a good idea to double check your inflation rates before you generate the remaining periods. See “Sync the Proposal Rates to the Institute Rates” on page 26.

#### **➡ To Generate the remaining periods in the budget:**

1. Click on the Generate All Periods button  to generate the remaining periods in the budget.
2. The remaining periods are generated by Coeus, and tabs are displayed for each period.

If you click on the **|Period 2|** tab, you will see that it has exactly the same line items as Period 1, with the appropriate escalation of costs.

The Total panel, under the **|Total|** tab, has also been populated with the total for the project, based on the line items in all the periods.

3. Click the Save button , or select **File > Save** from the menu to save your budget. Most likely you will make a number of adjustments to the budget to fine tune it, but now is a very good time to save your work.

If you have set a cost limit for the budget and your period line items (including indirect costs) total more than the cost limit, you will receive a warning message asking if you want to save anyway. Click [**Yes**] and move on to the next section to fine tune your budget and get all costs under your cost limit.

### **Making Adjustments to the Budget**

After you have generated all of the periods, you may need to make adjustments to the budget, such as deleting an expense that isn't appropriate in a later period, or adding line items to one or more periods. If you have specified a cost limit for the budget, you may find that the totals are over the cost limit, which may require either removing or adjusting line items in one or more periods, or changing the cost limit.


### **Deleting Line Items**

If a line item is not required in some periods (for example, a consultant is needed for the first three years of a five-year grant), you will probably include it in the generated periods, and then delete the line item in each period where it doesn't belong.




**NOTE:** To delete a personnel line item, you must first delete all the personnel budget details associated with that line item.

#### **➡ To delete a non-personnel budget line item:**


1. Click on the line item you want to delete, making sure you are in the right period. The line will be highlighted in yellow.
2. Click on the Delete Line Item button .



**Tip!** You can't use the <Delete> key to delete a line item. You must use the Delete Line Item button.

3. Click [**Yes**] at the prompt that asks if you are sure that you want to delete this line item. You will not be able to undo this action, so be sure that this is the correct line item to delete.
4. Remember to save your changes frequently by clicking the Save button . The budget will automatically recalculate when you save, but if you

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want to recalculate and keep working, you can also simply click the Calculate Budget button  to calculate changes without saving.

### ➡ **To delete a personnel line item with person details:**

If you want to delete a personnel line item, but the line item has no person details, treat the line item like a non-personnel line item.

1. Click on the line item you want to delete, making sure you are in the right period. The line will be highlighted in yellow.



Since you cannot delete a personnel line item that has personnel associated with it, you must first delete all the personnel on the item's Personnel Budget Detail window.

2. Click on the Personnel Budget for Line Item button  to display the Personnel Budget Details window for the selected line item.
3. Click on the [**Delete**] button to remove the highlighted line. Repeat this step for each personnel detail line.
4. When the window is blank, click on the [**OK**] button to return to the period panel. The personnel line item will still be highlighted.
5. Click on the Delete button  to delete the line item.
6. Save your changes by clicking the Save button .


### **Adding Line Items to One or More Budget Periods**

You may discover that you need to add a line item for one or more periods. If the item is only needed in one period, you can simply add the line item in the period. If the line item is needed in several consecutive periods, add the item in the first period where it's required and then apply it to the later periods.

### ➡ **To add a line item:**

1. Locate the period to which the line item should be added.
2. Click on the Add Line Item button  to add a new line. The line will be highlighted in yellow.
3. Enter the values as described in “Adding Personnel Line Items,” on page 30 or “Adding Line Items for Non-Personnel Budget Items,” on page 33, depending on the type of line item you need to add.
4. Save your changes by clicking the Save button .

➡ **To apply a new line item to later periods:**

1. Make sure the line item you want to apply to the later periods is selected. (It will be highlighted in yellow when it is selected.) If it is not, click on it to select it.
2. Go to **Items > Apply to later periods** from the menu bar to generate the line item through all the subsequent periods.
3. Save your changes by clicking the Save button .

## Changing a Line Item and Applying it to the Later Periods

➡ **To change a line item and apply it:**

1. Go to the first period where the change will take effect by clicking on the tab for that period (for example, if you want to make a change that will begin in Period 2, click the **Period 2** tab to open Period 2).
2. Click on the line item that you would like to change. The line item will highlight in yellow.
3. Double click on non-personnel line items to open the window and make your changes. Click **[OK]** when you are satisfied with the change. Open the Personnel Budget Details window to make changes to personnel (add/delete, revise effort, etc.).
4. The line item that you changed should still be highlighted in yellow, but if it is not, click on the line item that you changed to make sure that it is highlighted. Select **Items > Apply to later periods** from the menu bar to apply the change to later periods.



***Tip!** The Apply to Later Periods function only works consecutively forward. If you make a change to Period 2 and apply to later periods, all periods except for Period 1 will be changed because Period 1 is before Period 2.*

5. A message box will be displayed indicating that the line item already exists in the later periods and asking if you want it changed based on the selected line item. Click **[Yes]** to change all the later periods.

## Adjusting the Budget Limit

You can enter cost limits for each period. However, period cost limits are not correlated with the proposal's total cost limit. This means that the total cost limit is not calculated from the period cost limits, and likewise, period cost limits can total more or less than the proposal's total cost limit without a warning message. Cost period limits are independent and can be entered in each period.



**NOTE:** In Coeus, the cost limit includes any indirect costs, as well as the direct costs. The cost limit feature cannot be used to limit direct costs in the proposal.

You will receive a warning message if you have created a budget for the proposal and the total cost totals more than the Cost Limit; however, you can still save your budget as is.

If your budget exceeds the total cost limit set for the proposal, or for one or more of the periods in the proposal, there are two approaches you can take to resolve the problem:

1. You can reduce the period budgets. Coeus provides a feature that adjusts a single line item to fit the period cost limit, repeating this in each period until the total cost limit is satisfied.
2. You can increase the cost limit for the proposal, or change the cost limits for the periods to fit the budget for each period. For example you could increase the cost limit for period 1 and decrease the cost limit for periods 2 and 3 to keep the total within the proposal limit.

### Changing the Total Cost Limit for the Proposal


If you are using the Cost Limit feature to help keep your proposal within the sponsor’s goal, it is not likely that you would need to change the Total Cost Limit; rather, you should set the period cost limit for each period and then sync any flexible budget line items to the budget. See Syncing Line Items to Period Cost Limits below.

#### ◆ To change the cost limit for the proposal:

1. Click on the |**Summary**| tab of the Create Budget for Proposal window to display the Summary page.
2. Select the *Total Cost Limit* and type the new limit of the original value.

Residual Funds:	\$ .00	Total Cost Limit:	\$5,000,000.00	OH Rate Type:	MTDC
Total Cost:	\$4,799,321.73	Direct Cost:	\$3,633,330.07	Indirect Cost:	\$1,165,991.66

**Figure 15. Showing a total cost limit set to \$5M. Note the total cost is just under \$4.8M; if the total cost were to exceed \$5M, the user would be notified by Coeus.**

3. Click on the Save button  to save your changes to the budget.

### Syncing Line Items to Period Cost Limits

Syncing a line item to the Period Cost Limit is useful for tidying up your budget to a round number by period, or for most effectively keeping a cap on your budget without doing a number of complicated manual calculations.


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Coeus will adjust a single line item, reducing or increasing it in order to bring your period cost to an exact amount.



**NOTE:** The cleanest calculations are achieved with non-MTDC (non-overhead bearing) line items, such as Equipment. You cannot sync a personnel line item to the Period Cost Limit.

### ➡ To set Period Cost Limit and sync line items:


1. Click on the period tab that you would like to work in.
2. In the *Cost Limit* field, enter the dollar value to the amount required. (For example, your period *Total Cost* field shows **\$248,752.55**, and you want to bring your budget up to \$250,000 Dollars. Enter **250000** in the *Cost Limit* field.)
3. Select the line item you want to adjust to fit the cost limit for the period. Equipment is a good choice if your budget adjustment will be going up. If you will be reducing your budget, you will need to decide what budgeted item can be reduced by the necessary amount.
4. From the menu, select **Items > Sync to Period Cost Limit**. If your sync will reduce the line item budget, you will be prompted verify that you want to adjust this line item; in that case, click the [Yes] button. The line item amount will automatically change to a value that will make your total for the period equal to your Period Cost Limit value.
5. Repeat steps 1-4 for all periods in your budget.
6. Click on the Save button  to save your changes to the budget.

### **Modifying an Existing Budget**

#### **Copying the Budget to Create a New Version**

You can make a copy of the budget and then make changes to it according to your needs. You should know what kind of changes you will be making to the budget before you copy to decide if you want to copy Period 1 or all Periods. If you will be making a minor change to the budget that will occur in only one or two periods, you should copy all Periods. On the other hand, if you will be making major changes to the budget, but would like to retain the input from Period 1 to start with, you should copy only Period 1, make your changes, and then generate the remaining periods.

### ➡ To copy the budget:

1. Open the budget by clicking the Proposal Budget button . This will open the Select Budget window.

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2. From the Select Budget window, click on the budget line that you would like to copy.
3. Click the [**Copy**] button. This will bring up the Copy Budget dialog box.
4. On the Copy Budget dialog box, select the radio button that will apply to your budget. If you have minor changes to one or two periods of your existing budget, it is recommended that you select copy all periods, otherwise, if you will make major changes, you should select copy period one only.
5. This will open a copied version of your budget.




**Tip!** The information that you enter in the Comments field under the **Summary** tab will appear on the Select Budget window. That way, you can write a note to yourself to distinguish between versions of your budget so that you will know what changes you have made. For example, you could enter **Budget using 2 Postdocs and no subcontract.**

6. You should immediately sync your rates to the institute rates and make any changes to the rates that you will find necessary if your budget has not been adjusted recently. Refer to the section entitled Sync the Proposal Rates to the Institute Rates on page 26 for information on how to do so.
7. Make your changes to the budget. If you have questions about the process of making changes, refer to the above budget sections such as “Creating the Period 1 Budget” on page 29, “Modifying an Existing Budget” on page 41, or “Making Adjustments to the Budget” on page 37.

### Modifying an Existing Budget without Copying

You may want to make changes to an existing budget without copying that budget and creating a new version of the budget. In that case, do the following.

#### ➡ To modify an existing budget:


1. Open the budget by clicking the Proposal Budget button . This will open the Select Budget window.
2. From the Select Budget window, click on the budget line that you would like to modify.
3. Click the [**Modify**] button. This will open the budget in the modify mode.
4. Make your changes to the budget. If you have questions about the process of making changes, refer to the above budget sections such as “Creating the Period 1 Budget” on page 29, “Modifying an Existing Budget” on page 41, or “Making Adjustments to the Budget” on page 37.

## Entering Cost Sharing

If your proposal has a cost sharing requirement, you can enter the expense in one of two ways.

### ➡ To enter cost sharing by PI or persons involved in the project:

If your cost sharing requirement must be met by the effort of the PI or other persons involved in the project, you can enter the person's percent of effort greater than the percent charged to the budget in the Personnel Budget Details screen.

1. Click on the personnel line item in your budget that you want to cost share.
2. Click on the Personnel Budget for Line Item button  to display the Personnel Budget Details window.
3. Enter the person's percent of effort greater than the percent charged to the budget. For example, a Professor/PI with a 9-month base salary of \$90,000 (\$10K per month), inserted for 1 summer month (7/1/-7/31) at 100% effort and 50% charge would generate \$5,000 + EB + F&A in cost sharing.

Cost Elm.:	400005	Summer Faculty - On	Start Date :	01-Jan-2006	End Date :	31-Dec-2006	
Desc.:	Nunez, Wang, Yagelski						
Cost:	\$58,167.41	Underrecovery:	\$ .00	Cost Share:	\$18,751.00	Quantity:	3

Name	Job Code	Start Date	End Date	Period	% Charged	% Effort	Salary
Nunez, Patricia I	00000	01-Jun-2006	31-Aug-2006	SP	50.00	100.00	\$18,751.00
Wang, Xiao-Minh	00000	01-Jun-2006	31-Aug-2006	SP	100.00	100.00	\$27,291.80
Yagelski, Jacob Pierce	00000	01-Jun-2006	31-Aug-2006	SP	50.00	50.00	\$12,124.61

Figure 16. Showing Cost Sharing for Patricia Nunez's salary. Note the *Cost Share* field indicates the \$18,751 in cost sharing has been generated.

### ➡ To manually insert a cost share

1. You can insert a cost share dollar value into an existing line item by double clicking the line item to open the Budget Line Item Detail window.
2. Enter the dollar value in the *Cost Sharing* field in this window. The total cost sharing expense will be added to the Period total, including any appropriate indirect expenses.

<b>Category:</b>	Equipment	<input checked="" type="radio"/> On Campus	<input type="radio"/> Off Campus
<b>Cost Elm:</b>	421818	Equipment - Not MTDC	
<b>Start Date:</b>	01-Jan-2006	<b>End Date:</b>	31-Dec-2006
<b>Description:</b>	booster rocket		
<b>Cost:</b>	\$250,000.00	<b>Quantity:</b>	2
		<b>Apply Inflation:</b>	<input type="checkbox"/>
<b>Cost Sharing:</b>	\$100,000.00	<b>Underrecovery:</b>	\$ .00

Figure 17. Showing the manual insertion of \$100,000 cost sharing for the purchase of the booster rocket. Note that the cost of the rocket remains at \$250,000, but your budget will reflect an additional \$100,000 of cost sharing.

### **Distributing Cost Sharing Expense**

Your Coeus Budget cannot be set to **Complete** status until you distribute any cost sharing incurred in the budget. You will get a warning asking you to distribute the expense if there is any cost sharing in any period of your budget. Distributing cost sharing means providing account numbers responsible for incurring the expense.

#### **➡ To Distribute cost sharing:**

1. From the menu, go to **Edit > Cost Sharing Distribution** to open the Modify Proposal Cost Sharing window. The top portion of the window will display the total cost sharing expense incurred in each period. The bottom portion of the window contains the Cost Sharing Distribution Listing with a line for each fiscal year of the budget. There are buttons in the window to add more cells to distribute the expense to more than one account number.
2. Insert a % of the cost share expense in the *Percentage* column, or the \$ value in the *Amount* column for each fiscal year with a cost sharing expense.
3. Insert an account number in the *Source Account* field for each fiscal year with a cost sharing expense.
4. Click the [**Add**] button to insert another line in the Distribution table. Insert the %, FY, \$, and Source account.
5. Delete any unneeded distribution lines.

Version:	<input type="text" value="3"/>	Total Cost Sharing:	<input type="text" value="\$138,578.31"/>	<input type="button" value="OK"/>
Period:	<input type="text" value="1"/>	Total Cost Sharing:	<input type="text" value="\$138,578.31"/>	<input type="button" value="Cancel"/> <input type="button" value="Add"/> <input type="button" value="Delete"/>
Period:	<input type="text" value="2"/>	Total Cost Sharing:	<input type="text" value="\$ .00"/>	
Period:	<input type="text" value="3"/>	Total Cost Sharing:	<input type="text" value="\$ .00"/>	
Period:	<input type="text" value="4"/>	Total Cost Sharing:	<input type="text" value="\$ .00"/>	

**Cost Sharing Distribution List:**

Percentage	Fiscal Year	Amount	Source Account
.00	2006	\$38,578.31	99955
.00	2007	\$ .00	
.00	2008	\$ .00	
.00	2009	\$ .00	
.00	2006	\$100,000.00	55999

Figure 18. Showing the Cost Sharing Distribution window. Note the Total Cost Sharing amount of \$138,578.31 is distributed among two different accounts for Fiscal Year 2006.

6. Click [OK] to close the window.

### **Generating Underrecovery in a proposal budget**

If you are submitting a funding proposal to a sponsor that will not pay for the Institute’s full F&A expenses, uses a different indirect cost base (like Total Direct Cost -TDC), or a different rate than the current Institute rates (like a fixed-for-the-life award), you’re budget will most likely generate underrecovery. That is, there will be relevant indirect costs that will not be recovered--paid for--by your sponsor funds. If your budget incurs underrecovery, you need to identify the source(s) of funding that will support the expense in an Underrecovery Distribution table.

### **Generating Underrecovery with a Total Direct Cost Rate Type**

➡ **To Generate Underrecovery with a Total Direct Cost Rate Type:**

1. If your sponsor allows indirect expense calculation on Total Direct Costs instead of the Institute standard Modified Total Direct Cost, you must change the *OH Rate Type* applied to your budget on the budget |**Summary**| tab to **TDC**. Leave the *Underrecovery Rate Type* set at **MTDC**. The underrecovery expense displayed will be the balance remaining unfunded, if any, as the TDC base includes equipment and tuition expenses not included in the MTDC base.

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End Date: 31-Dec-2009


OH Rate Type: TDC

Indirect Cost: \$ .00

Budget Status: Incomplete

UR Rate Type: MTDC

Figure 19. From the Budget |Summary| tab, showing the TDC OH Rate Type and the MTDC Underrecovery Rate Type.

2. Create your budget as described in previous sections. Before generating periods, be sure to click the Maintain Rates for the Proposal button  to open the Rates Table and insert the sponsor’s OH rate in the *Applicable Rate* field for TDC. Remember insert rates for both OH on campus and off. Save the budget.
3. From the menu, go to **Edit > Under Recovery Distribution**. The top portion of the window has a line for underrecovery in each fiscal period of the budget. The bottom contains an Under Recovery Distribution table to be completed, with 2 lines for each fiscal year of the budget (On and Off Campus).
4. Insert the \$ amount in the *Underrecovery* field and the source account in the *Source Account* field to fund the underrecovery in each period, as needed.
5. Use the [Add] button to add more lines to the list if more than one Source Account is needed.
6. Use the [Delete] button to remove unneeded rows in the Distribution List.

Version: 4 Total Underrecovery: \$1,129,658.29

Period: 1 Total Underrecovery: \$269,841.61

Period: 2 Total Underrecovery: \$278,060.49

Period: 3 Total Underrecovery: \$286,521.83

Period: 4 Total Underrecovery: \$295,234.36

Buttons: OK, Cancel, Add, Delete

**Under Recovery Distribution List:**

Rate	Fiscal Year	Campus	Underrecovery	Source Account
1.00	2006	Off	\$269,841.61	55599
1.00	2007	On	\$278,060.49	55599
1.00	2008	On	\$286,521.83	55599
1.00	2009	On	\$295,234.36	55599

Figure 20. Showing The Underrecovery Distribution window. Note the rate, fiscal year, underrecovery amount and source accounts have been entered for each applicable year.

7. Click the [OK] button to close the window
8. On the |Summary| tab, mark the budget Final and **Complete**; Save the budget.

### Generating Underrecovery on Individual Line Items

If your sponsor will not pay indirect expenses on a particular expense, you can isolate that item from incurring F&A expense and generate underrecovery.

#### ➡ To Generate Underrecovery on Individual Line Items:

1. Open the Budget Module and create a budget as described in previous sections.
2. Insert a new line item in Period 1 and assign a cost element to it. Ex: 420070 – Foreign Travel Expense.
3. Insert the dollar value required for the expense in the *Cost* field.
4. Double click the line item to open the Budget Line Item Detail window.
5. Uncheck the Apply box for the Rate Class and Rate Type “MTDC” in the bottom section of the box.

Rate Class	Rate Type	Apply	Cost	Cost Sharing
TDC	TDC	<input type="checkbox"/>	\$ .00	\$ .00

Figure 21. Showing the unchecked Apply TDC checkbox.

6. Close the Detail window, calculate and save the budget.
7. From the menu, go to **Edit > Under Recovery Distribution**. The top portion of the window has a line for underrecovery in each fiscal period of the budget. The bottom contains an Under Recovery Distribution table to be completed, with 2 lines for each fiscal year of the budget (On and Off Campus).
8. Insert the \$ amount in the *Underrecovery* field and the source account in the *Source Account* field to fund the underrecovery in each period, as needed.
9. Use the [Add] button to add more lines to the list if more than one Source Account is needed.
10. Use the [Delete] button to remove unneeded rows in the Distribution List.

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Version:	<input type="text" value="4"/>	Total Underrecovery:	<input type="text" value="\$1,129,658.29"/>	<input type="button" value="OK"/>
Period:	<input type="text" value="1"/>	Total Underrecovery:	<input type="text" value="\$269,841.61"/>	<input type="button" value="Cancel"/>
Period:	<input type="text" value="2"/>	Total Underrecovery:	<input type="text" value="\$278,060.49"/>	<input type="button" value="Add"/>
Period:	<input type="text" value="3"/>	Total Underrecovery:	<input type="text" value="\$286,521.83"/>	<input type="button" value="Delete"/>
Period:	<input type="text" value="4"/>	Total Underrecovery:	<input type="text" value="\$295,234.36"/>	

**Under Recovery Distribution List:**

Rate	Fiscal Year	Campus	Underrecovery	Source Account
1.00	2006	Off	\$269,841.61	55599
1.00	2007	On	\$278,060.49	55599
1.00	2008	On	\$286,521.83	55599
1.00	2009	On	\$295,234.36	55599


**Figure 22. Showing The Underrecovery Distribution window. Note the rate, fiscal year, underrecovery amount and source accounts have been entered for each applicable year.**

11. Click the [OK] button to close the window
12. Save the budget.

### Generating Underrecovery on a Fixed-for-the-Life Award

If you are creating a budget to supplement an existing award with a fixed-for-the-life F&A rate that is different than the current Institute rate, your budget will incur either under- or over-recovery. Contact your OSP Contract Administrator for confirmation of the appropriate institute account number to use for distribution.

#### ➡ To Generate Underrecovery on a Fixed-for-the-Life award:

1. Create your budget as described in previous sections. Before generating periods, be sure to click the Maintain Rates for the Proposal button  to open the Rates Table and insert the appropriate fixed F&A rate (on and off campus) in all the fiscal year appearances in the MTDC section of the Rate Table. Save and apply the rates when prompted.
2. From the menu, go to **Edit > Under Recovery Distribution**. The top portion of the window has a line for underrecovery in each fiscal period of the budget. The bottom contains an Under Recovery Distribution table to be completed, with 2 lines for each fiscal year of the budget (On and Off Campus).
3. Insert the \$ amount in the *Underrecovery* field and the source account in the *Source Account* field to fund the underrecovery in each period, as needed.

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- Use the [**Add**] button to add more lines to the list if more than one Source Account is needed.
- Use the [**Delete**] button to remove unneeded rows in the Distribution List.

Version:	Total Underrecovery:
4	\$1,129,658.29

Period:	Total Underrecovery:
1	\$269,841.61
2	\$278,060.49
3	\$286,521.83
4	\$295,234.36

Rate	Fiscal Year	Campus	Underrecovery	Source Account
1.00	2006	Off	\$269,841.61	55599
1.00	2007	On	\$278,060.49	55599
1.00	2008	On	\$286,521.83	55599
1.00	2009	On	\$295,234.36	55599

Figure 23. Showing The Underrecovery Distribution window. Note the rate, fiscal year, underrecovery amount and source accounts have been entered for each applicable year.

- Click the [**OK**] button to close the window.
- On the [**Summary**] tab, mark the budget Final and **Complete**; Save the budget.

### **Program (Project) Income**

If you need to enter anticipated project income for your proposal, input the following steps:

#### **➔ To Input Project Income:**

- Create your budget as described in previous sections.
- From the menu, go to **Edit > Project Income**. Use the [**Add**] button and select the Period, insert the Income amount, and insert a description of the income. Click [**OK**] to close the Add Project Income box.

**Figure 24. Add Project Income box with Period, Income Amount, and Description indicated.**

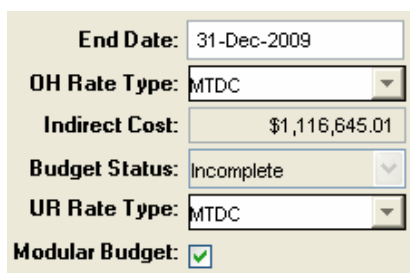
3. Use the [**Add**] button to add more periods to the **Project Income Details** window, as needed.
4. Use the [**Delete**] button to remove rows details list.

### **Modular Budget for NIH Proposals**

If you need to submit a modular NIH budget for your proposal, it is recommended that you follow the previous detailed budget input instructions in order to accurately calculate your indirect expenses. When your budget entry is complete, input the following information.

#### **➔ To Identify a Project as a Modular Budget:**

1. Create your budget as described in previous sections.
2. On the [**Summary**] tab check the Modular Budget checkbox.



The screenshot shows a portion of the Summary Panel with the following fields:

End Date:	31-Dec-2009
OH Rate Type:	MTDC
Indirect Cost:	\$1,116,645.01
Budget Status:	Incomplete
UR Rate Type:	MTDC
Modular Budget:	<input checked="" type="checkbox"/>

**Figure 25. Showing a portion of the Summary Panel indicating the location of the Modular Budget Checkbox.**

3. From the menu, go to **Edit > Modular Budget**. This will bring up the Modular Budget for Proposal window. Note that at the top of the window, there are tabs for each period and a tab labeled [**Cumulative**], which shows the totals for all the periods of your modular budget. Click the [**Period 1**] tab to work with period 1, etc.
4. Coeus will take the data from your detailed proposal budget and automatically suggest the modules for your modular budget: this is the “sync” feature. Coeus should automatically “sync” your budget when you open the Modular Budget for Proposal window. If not, click the [**Sync**] button to synchronize the modular feature with your created budget.
5. Direct Costs area: Each period has a direct costs area which calculates the direct costs and totals them for each period lumping them into one sum, rather than showing an itemized budet.

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- The *Direct Cost Less Consortium F&A* field takes the all of the direct cost for that period, totals it and rounds it up to the nearest \$25,000. This value does not include any F&A generated by consortiums (subcontracts). That value appears in the *Consortium F&A* field. For example, if your total period 1 direct cost (minus consortium F&A) is \$480,000, the modular budget would display **\$500,000.00** in the *Direct Cost Less Consortium F&A* field.
  - The *Consortium F&A* field is the total F&A generated by any consortium or subcontracts. This value does not get rounded to the nearest \$25,000.
6. The Indirect Costs area: Each period has an indirect costs area that shows the total indirect costs per IDC Rate. Each row in this area indicates a value per IDC Rate; thus if the IDC Rate changes during the period, you will see a line indicating the first rate and the prorated totals, and then a second line for the new rate and its prorated totals.
- The *Indirect Cost Type* field indicates the type of IDC, such as MTDC, TDC, etc.
  - The *IDC Rate (%)* field indicates the rate of indirect cost applied to the period (or part of the period with a prorated base and total).
  - The *IDC Base* field displays the funds in the budget that generate IDC.
  - The *Funds Requested* field displays the indirect costs + the applied F&A.

Modular Budget for Proposal 00001304, Version 3					
Period 1		Period 2	Period 3	Period 4	Cumulative
Start Date: 01-Jul-2006		End Date: 30-Jun-2007			
<b>Direct Costs</b>					
Direct Cost less Consortium F&A:				\$500,000.00	
Consortium F&A:				\$2,500.00	
Total Direct Costs:				\$502,500.00	
<b>Indirect Costs</b>					
Rate Number	Indirect Cost Type	IDC Rate (%)	IDC Base	Funds Requested	
1	MTDC	62.0	\$56,817.81	\$81,206.24	
2	MTDC	66.0	\$103,000.00	\$169,215.82	
3		0.0	\$0.00	\$0.00	
4		0.0	\$0.00	\$0.00	
<b>Total Indirect Costs:</b>				\$250,422.06	
<b>Total Direct and Indirect Costs</b>					
				<b>Funds Requested:</b>	
				\$752,922.06	

**Figure 26. Showing the Modular Budget with all periods accounted for. Use the tabs at the top to go to each period to make changes.**

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7. You can make any changes necessary to the automatic synchronization by clicking in the field and changing the values. Remember to make adjustments to the modular budget for each individual period.





**NOTE:** You can manually edit all the fields in the Modular Budget for Proposal window, but when you click the [**Sync**] button, any data that you had entered in the fields will be overwritten with the automatically generated data from the sync process.

8. Click [**OK**] button to close the window and save the modular budget.

### **Printing a Budget Summary Report**

Coeus provides a report that can be viewed online or printed that shows all budgets for a proposal, one sheet for each period.

#### **➡ To print a Budget Summary Report:**

1. Be sure you are in the Budget Module, and not in the Proposal Details.
2. Click the Calculate Budget button  to calculate any recent changes.
3. Select **File > Budget Summary...** from the menu. This will open your internet browser and will generate a PDF format Budget Summary Report.
4. You can review the report online by scrolling through the document.
5. Print the form by clicking the Print Icon  on the PDF menu, or go to **File > Print...** on the browser menu and then click the [**OK**] button when the print window displays.

### **Finalizing the Budget**

You can work on the budget for as long as you need to, saving it between sessions as needed. Most likely, you will create a number of possible budgets, but you will need to select one to be the Final Version of your budget. For more details on making multiple versions of your budget, see “Modifying an Existing Budget” on page 41.

Once you’ve determined which will become the final version of the budget, you will need to mark it as final. There are two ways mark you budget as final, and the difference is only a matter of convenience. If your budget is open, you can go to the Summary panel. If you are working in the Proposal Details window, you can select Budget and mark you budget as final in the Select Budget window. Follow the instructions below that relate to the window in which you are currently working.




***Tip!** You can always uncheck the Final checkbox for a Final Version of the budget and finalize a different version of the budget. However, once you submit the proposal for approval, the budget that is marked as final will be the version submitted to the sponsor.*

➡ **To finalize the budget from the budget Summary panel:**

1. With the version of the budget that you wish to mark as final open, click on the |**Summary**| tab to display the Summary panel.
2. Click on the Final checkbox to indicate that you want this to be the Final Version of the budget. You will be prompted to verify that you want to designate this version as final. Click the [**Yes**] button to set mark this version as the Final Version of the budget.

	Summary	Period 1	Period 2	Period 3	Period 4	Total
<b>Version:</b>	1					
<b>Final:</b>	<input checked="" type="checkbox"/>					
<b>Start Date:</b>						
<b>Residual Funds:</b>						\$ .00
<b>Total Cost:</b>						\$4,753,578.46
<b>Direct Cost:</b>						
<b>Underrecovery:</b>						\$ .00
<b>Cost Sharing:</b>						

**Figure 27. Showing a portion of the Summary Panel indicating the location of the Final checkbox.**

3. In the *Budget Status* field, select **Complete** from the dropdown list. This will indicate that you have reviewed the budget and that it is ready for approval routing.
4. Click [**OK**].
5. Click on the Save button  to save the changes to the budget status.

➡ **To finalize the budget on the Select Budget window:**

If you are in the Proposal Details window, and you are certain that the budget you wish to submit as the Final Version is updated and saved as such, then you can select it as final without having to go into the budget itself.

1. Click the Proposal Budget button  to display the Select Budget window.

This window lists all the saved versions of the budget for your proposal, including total cost for each.

2. Click on the Final checkbox next to the version of the budget that you want to use as the Final Version. A message will be displayed asking you


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to verify that you want to change the budget status. Click the **[Yes]** button to set mark this version as the Final Version of the budget.

6. In the *Budget Status* field, select **Complete** from the dropdown list. This will indicate that you have reviewed the budget and that it is ready for approval routing.

Budget Status:		Complete		Final Version: 2			
Version	Start Date	End Date	Total Cost	Final			
1	01 Jan 2006	31 Dec 2009	\$4,753,578.46	<input type="checkbox"/>			OK
2	01 Jan 2006	31 Dec 2009	\$4,504,376.30	<input checked="" type="checkbox"/>			Cancel
3	01 Jan 2006	31 Dec 2009	\$1,126,144.63	<input type="checkbox"/>			New
4	01 Jan 2006	31 Dec 2009	\$3,694,663.41	<input type="checkbox"/>			Modify
							Display

Figure 28. Showing the selection of the Final budget and the Status of "Complete."

3. Click on the Save button  to save the changes to the budget status.

## Uploading Narratives


The Narrative Module allows for uploading PDF or DOC files to your proposal from your computer desktop. The Narrative Types are derived from Grants.gov requirements and currently include: Narrative, Facilities, Equipment, Bibliography, Project Summary, Pre-Application, Budget Justification, Other, Subaward Budget, Table of Contents, Personal Data, Proprietary Information, and Supplementary Documentation. Other Narrative Types will be added to this list, as required for Grants.gov submissions.

### **Access Narrative for Proposal Window**

You must begin at the Proposal Details window in order to access the Narrative for Proposal window. If you are in the budget, save your work and either close the Budget Module or select Proposal Details from the Window menu. This will bring you back at the Proposal Details window.

To expedite uploading your proposal narratives, store the files in a convenient folder on your computer.


#### **➤ To open the Narrative for Proposal window:**

1. Click the Proposal Narrative button  to open the Narrative for Proposal window, or from the menubar go to **Edit > Narrative**.

The Narrative for Proposal window has a series of blank fields which you will fill when you Add Narrative Modules, Select the Narrative Type, and upload the file.

### **Create a Narrative Module and Upload a Document**

#### **➤ Upload a Narrative Document to the Narrative for Proposal window:**

1. Click on the Add Module button  to insert a new module. This will open the Edit Module Details window.

Some of the information in this window is optional, but is very useful for specifying what is important in the documents that you are uploading.

2. Select the Narrative Type from the *Narrative Type* dropdown menu. You can only have one of some Narrative Types. That is, you can only have one file that is the **Narrative**, only one file that is the **Bibliography**, etc.

However, the Narrative Types **Other**, **Other Attachments Form**, and **Personal Data** are the exceptions. You can have any number of modules with these Narrative Types, each with a different file uploaded to it.

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NOTE: For all Narrative Types **Other**, you must enter a Title in the *Module Title* field (see below).

3. The *Status* field should indicate **Complete**, but you can mark the module **Incomplete** as a reminder to go back to the file and make some changes or updates. In order to submit this proposal for approval, all your narratives must be marked **Complete**.
4. Enter a title for your narrative in the *Module Title* field. For all Narrative types except **Other**, this field is for your reference only. However, in the Narrative Type **Other**, whatever you enter in this field will become the filename that is transmitted to Grants.gov. So, if the sponsor indicates that they require a file transferred with a specific filename, use the Narrative Type **Other** to upload the file and then type the specific filename in the *Module Title* field.

For example: If NSF were to require for a proposal a file named “specificfilename.pdf.” You would upload an Adobe PDF file in the Narrative Type **Other**, module, and in the *Module Title* field you would enter **specificfilename.pdf**.

For specific filename conventions, refer to your funding opportunity.

5. The following fields are optional: *Contact Name*, *Phone Number*, *Email Address*, and *Comments*. This information is useful if you want to record the author or editor of this document, or to write a note in the *Comments* field to help you remember some specific information about this particular narrative.
6. You can designate users access rights to either update this narrative file or view only (each file has designated rights; you will have to designate for each file a new set of rights). Check the box that is appropriate for each user. You will automatically be given Modify access to proposals you create, and you should not change your rights.

The Read checkbox indicates that the user can read the document, but cannot update the document. The Modify checkbox indicates that the user can make updates to these details and upload a new file in this module. The None checkbox indicates that the user cannot open the details to view them, nor open the file to view it.



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User	Rights
SNEDEKER (Ben Snedeker)	<input type="radio"/> Read <input checked="" type="radio"/> Modify <input type="radio"/> None

**Figure 29. Showing Edit Module Deatails window with completed details.**

7. When you have entered all the details that you wish to enter, click the [OK] button.




The Narrative for Proposal window will show the module with the details that you have added and you will now be able to upload the file.

8. To upload a file, highlight the *Narrative Type* module line. If you have created multiple *Narrative Type* modules, be sure that the correct row is selected. From the menu bar, click either the Upload Word File button  if you will be uploading a Microsoft Word file, or the Upload PDF File  button if you will be uploading an Adobe PDF File. This will open a file browser window. Or from the menu bar, go to **Edit > Upload Files**, and select either **Upload Word File** or **Upload PDF Files**.



**Tip!** It is recommended that you use PDF whenever possible, but you must select the upload type that matches the file type that you are uploading.

9. In the file browser window, browse to your file and click [Open].
10. You will know that you have uploaded a file when an icon appears to the left of the line item that you have just uploaded. If you would like to view the file, simply double-click on the icon to open and view it.
11. Repeat steps 1-10 until all modules have been uploaded. Remember to refer to the instructions in your funding opportunity to include the appropriate Module types and document titles.

12. If you would like to rearrange the order of the uploaded modules, use the arrow keys   to move any selected module up or down in the list.
13. Click on the Save button  to save the changes to the narrative.
14. When you have finished with the Narrative section and have saved your changes, close the Narrative for Proposal window.

### **Modify an Uploaded Narrative Module**

You may wish to make changes to narratives that have been uploaded. You may want to delete a narrative module or you may want to update a file that you have already uploaded. You can also update the details for the module.

You now have the ability to upload a revised narrative to the proposal after it has been submitted for approval routing. You cannot create a new narrative module after the proposal is routing, but you can upload a revised version of the narrative to an existing module. See “\_\_\_\_\_” below for details.



### **Delete a Narrative Module**

Performing this action will delete the entire line from your proposal submission. Do not use this method if you only want to replace an uploaded file. You can easily overwrite an uploaded file to replace the prior version. See the section entitled “Upload an Updated Version of a Previously Uploaded File” on page 58 for replacing an uploaded file with an updated file.

#### **➔ To delete a Narrative Module:**

1. Click on the line item to highlight the uploaded Narrative Module that you would like to delete.

Remember: This will delete the whole module, including the details that you entered (such as Contact Name, Phone Number, etc) in addition to the uploaded file.

2. Click the Delete Module button  (or, from the Edit menu, select Delete Module). A popup window will ask you to confirm that you wish to delete the module. Click the [Yes] button to delete the item. If you click the [No] button, the item will not be deleted.
3. Click on the Save button  to save the changes to the narrative



### **Upload an Updated Version of a Previously Uploaded File**

If you find that the file that you uploaded to a particular module needs to be replaced with an updated file, you will do the following. You do not need to

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delete the module and reenter all of the data; rather, you can simply upload the new document, and it will overwrite the old one in Coeus.

### ➡ To update a file that you previously uploaded:

1. Click on the line item to highlight the Narrative Module that you would like to update.
2. Click either the Upload Word File button  if you will be uploading a Microsoft Word file, or the Upload PDF File  button if you will be uploading an Adobe PDF File. This will open a file browser window.





*Tip! It is recommended that you use PDF whenever possible, but you must select the upload type that matches the file type that you are uploading.*

3. In the file browser window, browse to your new file and click [**Open**]. This will overwrite the old file and the new one will be uploaded to your proposal.
4. To be sure that your newest file has uploaded, double-click on the icon to the right of the module line item that you are working on to open the file.
5. Click on the Save button  to save the changes to the narrative

### Update Module Details

If you would like to make changes to the module details without changing the file that was uploaded, you will do the following.

### ➡ To update module details:

1. Click on the line item to highlight the Narrative Module that you would like to update.
2. Click the Modify Module button  to open the Edit Module Details window. (Or from the Edit menu, select Modify.)
3. Make any changes necessary.
4. When finished making edits, click the [**OK**] button.
5. Click on the Save button  to save the changes to the narrative.

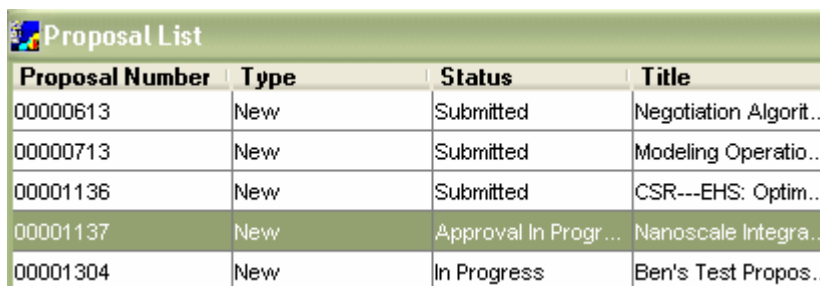
## Uploading a Revised Version of a Narrative After Submitting the Proposal for Approval

You have the ability to edit/upload a refreshed PDF file after you have submitted the proposal for approval routing; so, you can start your routing and approval with draft science in the module. While in routing, the PI or administrator can upload new PDF files to replace existing files. This is possible throughout the entire routing cycle. **Once the proposal is submitted to the sponsor, however, you cannot upload any new PDF files.** If you refresh the science during routing, any person that has already approved the proposal is sent an email to alert him/her that the narratives were refreshed. That way, if the person wants, he/she can go back to reread the narratives.

You cannot, however, create new narrative types after routing has begun. That is, if the proposal contains a narrative type of **Narrative** when the routing is initiated, then you can upload and replace the PDF for that narrative type. But if the department forgot to add the **Facilities** narrative type, then the proposal must be rejected, since there was no narrative type **Facilities** to replace; the department must then create a **Facilities** narrative type and resubmit for approval.

### ➔ To Upload a revised narrative:

1. Search for your proposal, and highlight the proposal from the Proposal List. The proposal must have a status of **Approval in Progress**: Due to Grants.gov restrictions, Coeus will not allow modification of any proposals that have the status **Submitted**.



Proposal List			
Proposal Number	Type	Status	Title
00000613	New	Submitted	Negotiation Algorit...
00000713	New	Submitted	Modeling Operatio...
00001136	New	Submitted	CSR---EHS: Optim...
00001137	New	Approval In Progr...	Nanoscale Integra...
00001304	New	In Progress	Ben's Test Propos...


Figure 30. Showing the selection of a proposal in the Approval in Progress stage.

2. From the menu bar, go to **Edit > Narrative**.
3. Now upload the narrative as normal (see “Upload an Updated Version of a Previously Uploaded File” on page 60).

Remember, you cannot, however, create new PDF rows. For example: if the proposal contains a narrative type of **Facilities** from when the routing was initiated, then you can upload and replace the narrative. But if the department forgot to add the **Facilities** type, then the proposal must be

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rejected, since there was no narrative type **Facilities** to replace; the department must then create a **Facilities** narrative type and resubmit the entire proposal for approval.

4. Click on the Save button  to save the changes to the narrative.



**Tip!** *By changing and saving any Narrative module during routing, Coeus sends all persons who have already approved the proposal an email alerting him/her that the Narratives were refreshed. That way, if the person wants, he/she can go back to reread the Narratives.*

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## Submitting the Proposal for Routing

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You will need to finalize the proposal before you can submit it for approval routing. To finalize, you will need to Answer the Yes/No questions, certify the investigators, validate the proposal, which will include verifying that you have entered the necessary data for institute and sponsor-specific criteria.

Even if you will not be submitting the proposal to the sponsor electronically via Coeus, you can still use Coeus to electronically route the proposal through the Institute for approval.

### **Answering the Yes/No Questions**

This section contains a series of compliance questions required by either the institute or the sponsor. Review the questions with your P.I. prior to answering. Contact your OSP administrator if you need assistance answering the questions.

#### **➡ To answer the Yes/No Questions**

1. From the Proposal Details module, Go to **Edit > Yes No Questions...** on the menu bar to open the Proposal Question window.
2. Answer each question accurately by clicking either the Yes or No radio button.
3. Click the **[OK]** button.
4. If you have answered any questions that require further explanation, Coeus will prompt you to do so with a popup window. Coeus will also automatically jump to the line in question and highlight it in red. Provide a brief explanation by typing it in the *Explanation* field.

Also, if you accidentally missed any questions, Coeus will notify you with a popup window and will ask you to answer that question.

Coeus only notifies you one line at a time, so after you have followed the instructions, click the **[OK]** button, Coeus may prompt you to make another correction. Once the questions have all been answered and explained (if necessary) the Proposal Question window will automatically close after you have clicked **[OK]** the final time. This indicates that all Yes/No Questions have been answered sufficiently.

### **Certify the Investigators**

After you have added the Principle Investigator, and designated the person as such, as well as added all the Co-Investigators, you must certify each


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investigator. This means that you will answer the questions on an electronic certificate in Coeus to signify that you have reviewed these items with the PI and will obtain the ink-signed paper certification from each investigator. You must then print the paper certification from Coeus, and have each investigator sign it. The original from each investigator must go to your OSP representative to become part of the institutional proposal file. The electronic certification must be completed in order to submit the proposal.

### ➡ **To certify the investigators:**


1. On the Proposal Details screen, click the **|Investigator|** tab to open the Investigators panel.
2. Click on the topmost investigator in the *Person Name* field to select that investigator.
3. Click the **[Certify]** button to open the electronic certificate.
4. Review the questions with the Investigator, the answer all questions on the form by selecting the yes or no radio button.
5. Click the **[OK]** button to certify the investigator. This will return you to the Investigator panel. If you click the **[Certify]** button again for this investigator, you will see that the questions have been answered.
6. Repeat the electronic certification process for all investigators on your list.
7. Once you've electronically certified the investigators, print all the certifications. To do so:
  - a. Go to **Action > Print Certifications...** A list of all the certified investigators will display. Make sure that all investigators are certified. (If you are missing any names on the displayed list, click the **[Close]** button and go back and certify any missing investigators. Then, come back to print.)
  - b. Click the **[Print All]** button. This will generate a PDF file of the certifications for all the investigators on your list. Print the file (go to **File > Print...** and click **[OK]** ).
8. Have each investigator sign his or her respective certification and submit the original to the Office of Sponsored Programs.


### ***Check the Narrative/Budget Statuses***


You will need to be sure that the statuses for the Narrative and Budget sections are complete (represented by a green checkmark ) in order to submit the proposal for routing. The statuses are indicated on the Proposal Details screen.


➡ **To check the Narrative/Budget statuses:**


1. From the Proposal Details window, click the **|Proposal|** tab to go to the Proposal panel.
2. In the upper right corner of the panel are the statuses of the Narrative and Budgets for this proposal. Below is a description of each status:


**Narrative:**  This means that you have uploaded at least one Narrative and have designated all uploaded Narrative documents as **Complete**.





**Narrative:**  This means that you have copied a proposal and included the Narratives from that proposal; you should go to the Narrative window and make sure that all the uploaded documents are up to date and complete.

**Narrative:**  This means that no modules have been added or documents have been uploaded to the Narrative window.





**Budget:**  This means that you have selected a version of the budget to be designated as **Final**, and you have designated that budget as **Complete**.

**Budget:**  This means that you have at least one version of the budget created, but it is not designated as **Final** or **Complete**. Coeus is indicating that the budget is still in progress.

**Budget:**  This means that no version of the budget has been created.

3. Both the budget indicator and the narrative indicator must show green checkmarks in order to consider the proposal ready for submission. Make any changes necessary to the budget or narrative according to the chart above to change the status to complete.
  - a. To change **Budget** from  to  you will need to create a budget and designate it as **Final** and **Complete**. To do so, go to Creating a Proposal Budget on page 24.
  - b. To change **Narrative** from  to  you will need to upload your narrative documents. To do so, go to Uploading Narratives on page 55.

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- c. To change **Budget** from  to  you will need to designate your budget as **Final** and **Complete**. To do so, go to Finalizing the Budget on page 52.
- d. To change **Narrative** from  to  you will need to verify that your narrative documents are updated. Simply open the narrative window and open each uploaded document to be sure that the contents are complete and up to date. For help with this, go to Modify an Uploaded Narrative Module on page 58.

### ***Validate with Coeus***

The Coeus validation check will alert you if you have missed or failed to complete required elements in your proposal. This validation reviews your proposal data for institutional issues and certain sponsor requirements. If you are submitting your proposal via Grants.gov, there is another Grants.gov specific validation. See “Validate against Grants.Gov.” on page 69 for detailed instructions on that validation process.

#### **➔ To validate institutionally in Coeus:**

1. Go to **Action > Validation Checks** on the menubar.
2. This will run a validation check and will produce a window that alerts you to any items that you will need to address in order to complete your proposal before submitting it.
3. You will always receive a notice to check your uploaded Word and PDF documents.
4. Click Print to retain a copy of the failed validations for review and correction, then click OK to close the Validation window.
5. Correct your proposal appropriately to pass the validations in order to submit your proposal for approval routing.

### ***Submit the Proposal for Approval Routing***

Submitting a proposal for approval routing is a simple operation; however, you must make sure that the proposal is final and complete. For this reason, the previous topics in this section cover the final checks that you should perform before submitting your proposal for routing. When the proposal is ready, submit it for routing.

#### **➔ To submit a proposal for routing:**

1. Go to **Action > Submit for Approval...** on the menubar.

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2. You may be notified that your Narratives need to be updated; this is simply a reminder to you that you should be absolutely sure that your Narrative files that have been uploaded conform to the sponsor's requirements. If you validated with Coeus, then you should already know that this is true. Click the [OK] button to proceed. You will be asked if you want to continue to submit the proposal. Click [Yes] if you know that your narratives are correct, click [No] if you need to double-check your narratives.
3. Coeus will automatically send the proposal through the proper approval mapping. The Proposal Routing window will display, showing you the routing for this proposal. This window is for your information, and once you view it, you can click the [Close] button to close the window; this action will also close your proposal and set its status to **Approval in Progress**.

### ***Print a Full Paper Version of the Proposal***


You may want to print a full paper version of the proposal for your records.

#### **➡ To print a full paper version of the proposal:**

1. Go to **File > Print** on the menubar. This will open the Print Proposal window.
2. Select a Printing Package from the *Select a Package to Print* field by clicking on the package you would like to print. You can either print the Coeus generic forms or you can print the sponsor-specific form(s).
3. Select the forms to print from the *Select Page[s] to Print* field. You can either <Ctrl> + click (Mac users will <Command> + click) on the individual lines to select specific pages or you can click the Print All Pages checkbox to select all the pages for that package.



**NOTE:** You may have noticed that your narrative documents and certifications for your investigators do not appear among the pages available for printing. You will have to print these separately and add them to the paper proposal.

4. When you have selected the forms you would like to print, click the [Print] button. This will open your internet browser and will generate a PDF version of your proposal.
5. You can review the report online by scrolling through the document.
6. Print the form by clicking the Print Icon  on the PDF menu, or go to **File > Print...** on the browser menu and then click the [OK] button when the print window displays.

## Special Instructions for Grants.gov Submissions

### Preparing Proposals for Submittal via Grants.gov

Coeus has the ability to submit proposals created in Proposal Development to directly to Grants.gov (system-to-system or S2S). You must be certain that the funding opportunity you are responding to is eligible for submission.

To determine eligibility, you must:

1. Have a CFDA Number to apply to the proposal.
2. Make sure that all the Mandatory forms are available to Coeus.

To determine if these two criteria have been met, proceed below. If eligible, once fully processed, you will have the ability to monitor your submission status via Coeus; you do not have to go to the Grants.gov website to find details about your proposal.

### Find the Opportunity's CFDA Number

#### ➡ To find the opportunity's CFDA Number:

If you already know the opportunity's CFDA Number, Go directly to Apply the CFDA Number to Your Proposal on page 68.



**NOTE:** CFDA stands for Catalogue of Federal Domestic Assistance and applies only to Government sponsored research. Industrial sponsors do not use CFDA Numbers.

1. Open your web browser and go to <http://www.grants.gov/>
2. Click on the Find Grant Opportunities link.
3. Click the Basic Search link.
4. Enter the keyword(s) in the *Keyword Search* field, and then click the [Start Search] button.
5. In the search results, find the announcement for which you are searching and take note of the CFDA number (it is a five-digit number with a decimal point, for example: **81.049**)

## Apply the CFDA Number to Your Proposal

### ➡ To Confirm Coeus submission via Grants.gov:

1. If you know the CFDA Number, enter it in the *CFDA No.* field in the Proposal Details panel under the |**Proposal**| tab.; do not enter the decimal point, Coeus has already supplied the decimal, (for example, enter **81049**). The CFDA will appear on the announcement, but if you do not have the announcement, you can retrieve it from Grants.gov.
2. Go to **Action > Grants.gov** from the menu bar. Coeus will use your internet connection to contact Grants.gov. The Grants.gov Submission Details window will open.
3. Click **Select Opportunity**. This will open another window with all the funding opportunity's offered under this CFDA number. Select the Opportunity Id for your proposal.

If you need to confirm the opportunity, once highlighted, double click on the web address line, Instruction URL: at bottom of the window. This will open a browser window with the complete sponsor opportunity instructions.

Opportunity Id	Opportunity Title	CFDA Number	Comp
DE-FG01-05ER05-30	Basic Research for Chemical Imaging	81.049	
DE-FG01-06ER06-01	Continuation of Solicitation for the Offic...	81.049	NONE
DE-PS24-06OH00010	Test 424 V2 with other attachments	81.049	
DE-AB02-06CC10506	sbir test 010506	81.049	
DE-FG01-06ER20106	DOE SBIR/STTR Sys-To-Sys Testing	81.049	123

**Schema URL:** <http://atapply.grants.gov/opportunities/schemas/applicant/oppDE-AB02-06CC10506-cfda81.04...>  
**Instruction URL:** <http://atapply.grants.gov/opportunities/instructions/oppDE-AB02-06CC10506-cfda81.049-instru...>

**Figure 31. Showing the Select an Opportunity window with the available opportunities under the CFDA # we selected. Note that the mouse is scrolling over the Instruction URL. Double-clicking here will open the opportunity's details pages.**

4. If this is the correct opportunity, click [OK]. This will return you to the Grants.gov Submissions Details window. Notice now the |**Opportunity**| tab has been filled in with the details of your selection.



*Tip!* When you apply this opportunity to your proposal, Coeus will automatically insert the Program No. field and the Program Title fields..

## Check That All Mandatory Grants.gov Forms Exist in Coeus

### ➡ To Check the Forms:

1. Select the **Forms** tab from the Grants.gov Submission Details window and review what forms are checked as **Mandatory**.



**NOTE:** If the checked Mandatory forms are listed as **Not Available**, then this proposal is not eligible for Coeus system-to-system submission. You can use Coeus to assist with your proposal budget preparation and electronic approval routing, but your full proposal must be submitted to Grants.gov via the PureEdge forms.

Form Name	Mandatory	Include	
RR_SubawardBudget-V1.1	<input type="checkbox"/>	<input type="checkbox"/>	Not Available
RR Budget	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
SFLLL	<input type="checkbox"/>	<input type="checkbox"/>	Not Available
RR SF 424	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available
RR Other Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available

Figure 32. Showing the Grants.gov Submission Details screen under the Forms tab. All mandatory forms are available in this case: the proposal can be submitted to Grants.gov.

2. If all the mandatory forms are available, your proposal can be submitted fully via Coeus.
3. Click the **[Close]** button when finished.

## Validate against Grants.Gov.

If your proposal is eligible for electronic S2S submission to Grants.gov via Coeus, you will need to validate your proposal before you can consider it complete. This validation determines whether or not all the sponsor's required elements for this announcement have been entered. Note: You must have completed your proposal preparation and uploads, entered a CFDA number and selected an Opportunity in order to run this validation check.

### ➡ To Validate against Grants.Gov:

1. Go to **Action > Grants.gov** on the menu bar.
2. Click the **[Validate]** button on the **[Opportunity]** tab to validate your proposal.

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3. The validation check will determine if there are any missing required elements that need addressing.
4. If you don't get the "Validation Successful" message, close the window, return to your proposal and enter the missing items. Repeat steps 1 through 4 until your Grants.gov validation is successful.

### ***Check on the submission status of a proposal via Grants.gov***

Following Institutional submission of your proposal, you can check on the submission status via Grants.gov. You can only check on the status of the specific proposal number that you are currently working in; you cannot check any other Grants.gov submission status. You must always open the proposal number that you want to check on.

#### **➡ To check on the submission status of a proposal via Grants.gov:**

1. Go to **Action > Grants.gov** on the menu bar. This will open the Grants.gov Submission Details window.
2. Click on the **|Submission Status|** tab.
3. Click the **[Refresh]** button. Coeus will go to Grants.gov and retrieve any updates for this submission.
4. If there is any new data, the appropriate fields will update.
5. Click the **[Close]** button when finished.

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## Additional Functionality

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### *Getting Help with Coeus*

There are a number of ways to get help with Coeus. If you have a simple question, you should be able to find your answer via the online help documentation. If you have a more complicated question, and you cannot find help in the documentation, you can contact your OSP administrator.

#### ➡ **To get help in the online documentation:**

1. Go to **Help > Help Topics** on the menu bar. This will open up the Coeus User Documentation web page.
2. You can select one of the manuals that will help with your question, or you can click on the link for the “[Help Pages](#),” which will open the Help Pages webpage. The Help Pages are a series of short guides that are meant to give you quick help on simple Coeus tasks, such as searching and how toolbars work.

#### ➡ **To email Coeus help:**


1. If you cannot find help in the documentation published online, or you are having system trouble, you can email the Coeus help center. The email address is [coeus-help@mit.edu](mailto:coeus-help@mit.edu).
2. Make your request as specific as possible. If your question involves a proposal that you are working on, you should include the Proposal Number.

### *Adding a Name to the Rolodex*


When you add a name to the Rolodex in Proposal Development, it will be temporarily connected to your proposal for editing until the proposal has been submitted for approval. At that point, the new Rolodex ID will be locked from editing except by OSP staff.

You should search the Rolodex for the Rolodex ID that you are looking for and make sure that the name you are adding does not already exist. You should not be adding redundant information to the database.

#### ➡ **To add a name to the Rolodex:**

1. Click the Maintain Rolodex button  to open the Rolodex Search window.
2. Click the [**Cancel**] button.

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3. Click the Add button  to open the Add New Rolodex window.
4. Enter as much information in the boxes as you know about this contact. Remember: do not put the name of the individual for contact as an Attention line within the address because it will not be searchable by name once added to the Rolodex; rather, put the name information in the proper name fields (*last name, first name, MI*). Also, the *State* and *Country* fields have dropdown menus from which you can select the proper data.
5. When you've updated the information to your satisfaction, click the [OK] button to save the changes to the proposal.

### **Granting View/Update Access to Your Proposal**

You have the ability to grant individuals access to your proposal, either view-only or update access; however, you cannot grant anyone Approver access. In addition to adding others to assist in your proposal preparation, you may want your OSP Administrator to have view access to your proposal so that they can check through some of the details while you work on developing it.


Any access you give to a user will apply only to the proposal that you are working on; if you copy the proposal, the access rights will not copy over- the access rights will only apply to the specific proposal number where they were granted.



**NOTE:** The special role called **Modify All Dev Proposals** exists in the User Maintenance database, and is a special role that grants the user authority to modify any and all proposals in his/her DLC. This role can only be granted with the approval of the Administrative Officer. This role is not proposal-specific; rather, it applies to all proposals. Contact [coeus-help@mit.edu](mailto:coeus-help@mit.edu) with questions or to request this role.

### **Assigning View/Update Access to Your Proposal**

#### **➡ To Grant View/Update Access:**

1. Click on the Proposal Roles Maintenance button  to open the Proposal Roles window, or from the menu bar, go to **Edit > Proposal Roles Maintenance**.
2. On the left side of the window is the Users pane which lists all the users in your unit. On the right side of the window is the Roles pane which lists all the roles that you can assign to the users. These are expandable, so if you see a plus button [+ ] next to the role, you will be able to click it and expand the role and see all the users that have been assigned to the role. If you want to collapse the, click the minus button [-].



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Following is a list of the roles that you can assign, and a description of them:

<b>Aggregator</b>	This role allows the user to make changes to any part of this proposal.
<b>Approver</b>	This role allows the user to approve the proposal. You do not have the ability to add or delete users from this role; however, you can see which users have been designated as Approvers.
<b>Budget Creator</b>	This role allows the user to make changes to the budget only.
<b>Narrative Writer</b>	This role allows the user to make changes to the narratives only.
<b>Viewer</b>	This role allows the user to view any part of the proposal, but not make any changes.

3. Scroll through the list of users in the Users pane on the left and highlight a user to whom you would like to designate a role.

If you would like to add a name for someone outside your unit, click the **[Users]** button, which will open up a search window. You can search for the individual, select them from the search results, and click **[OK]**. This will add them to your Users list, so you will have to find them and select them from the list.

4. Drag and drop the person into the role that you would like to give them. When you are dragging the person, you will notice that the mouse pointer turns from an arrow  to a finger . This will show you that you are dragging the user. When you drop the person into a role, their name will append below the role in a list.

You can drag and drop any number of individuals into a role.

5. When you have setup all the appropriate roles, click the **[OK]** button to apply your changes. If you do not want to apply your changes, click the **[Cancel]** button.

### Removing View/Update Access from a User



#### To delete a user from a role:

1. Select a user from that list that appears under the role that you want to delete them from (not from the User pane on the left).

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You may have to expand a list of users from under the role; to do so, click the plus button [+] to the right of the role. This will display all users that have been assigned to the role.

2. Drag and drop the user to the garbage can icon on the bottom right of the window.


When you are dragging the person, you will notice that the mouse pointer turns from an arrow  to a finger . This will show you that you are dragging the user. When you have dropped the user into the garbage can, their name will no longer appear under the role.

3. When you have setup all the appropriate roles, click the [OK] button to apply your changes. If you do not want to apply your changes, click the [Cancel] button.

### **Managing Your Coeus Inbox and Sending Notifications**

Your Coeus Inbox functions in a way like a mailbox. Notifications come into your Coeus Inbox that link to specific proposals. You may receive a comment on a proposal that is in development (to see how this is done, go to “Check the Notepad” on page 75) so it is good to check your inbox frequently when working on a proposal.

### **Managing your Coeus Inbox**

1. Login to Coeus.
2. Click the Maintain Inbox  button to open your inbox. The inbox has two tabbed panels. The |Unresolved| tab displays all of the messages that you have not read or “resolved”. The |Resolved| tab displays all the proposals that you have already read or “resolved”.
3. Click the |Unresolved| tab to view unresolved notifications.

Each unresolved notification for proposals is color coded to indicate the due date for submission to the sponsor:

**Red:** 3 or less days until due to sponsor

**Yellow:** 4-5 days until due to sponsor


**Green:** 6-10 days until due to sponsor


**No Color:** +10 days until due to sponsor

4. Select a notification for the proposal that you would like to review and double-click on the line to open that proposal. If you double-click on any notification (not just notifications for proposals needing approval), it will

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open the proposal linked to it. From here you must check the notepad to read any updated notifications (See “Check the Notepad” on page 75).


5. When you have reviewed the notifications, move it from the |**Unresolved**| tab to the |**Resolved**| tab. To do so, click once on the notification to highlight it and then click the Change the Status  button.

To delete any notifications from the inbox (it is not recommended to delete any items from under the |**Unresolved**| tab), click once on the notification to highlight it and then click the Delete the Selected Message  button. Click [**Yes**] to confirm the delete. This will permanently delete the message from your Inbox.

### Check the Notepad

Any comments that have passed back and forth between approvers and proposal developers would be stored in the Notepad function of Coeus. You, too, can add your comments and notations on the process to the Notepad. The Notepad function automatically date-stamps and indicates the commenter’s name along with the comment.

#### ➔ To Use the Notepad function:

1. Click the Notepad  button to open the Notepad.
2. If any comments have been made, you will see them listed. Each comment will have above it the following two fields, *By*, which identifies the commenter, and *On*, which identifies the date and time the comment was made.

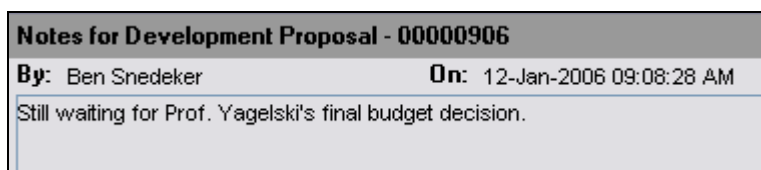





Figure 33. Notepad notation showing the commenter and date-stamp.

3. If you want to add a notation to the Notepad, click the Add New Row  button. A new box will appear at the top of the notes section. Click inside the white note area and type your note.
4. When you are finished with your note, click the save  button. This will apply your notation to Coeus.

## Send a Proposal Notification

### ➡ To email your last notation to the approvers in the map:

1. While you are still in the Notepad window, click the Send Proposal Notification  button. This will open a new window with the message at the bottom and a *Send to* field on the left and a *Players* field on the right.
2. Click on the name of any Player listed that you would like to email your comment to and drag them into the *Send to* field. If you want to remove a name from the *Send to* field, click on their name to highlight them and then click the [Remove] button.

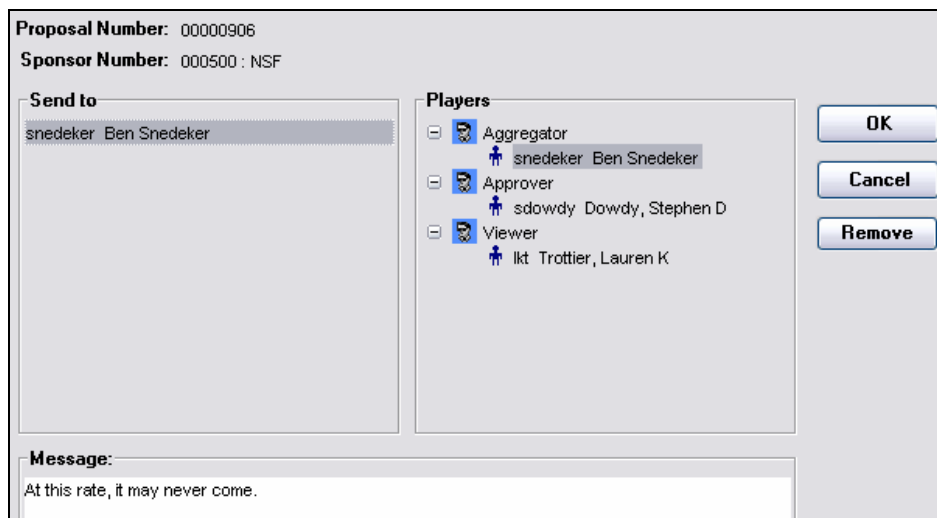


Figure 34. The Send Proposal Notification window showing the *Send to*, *Players*, and *Message* fields.

3. When your *Send to* list is complete, click the [OK] button. This will send the email to all the individuals listed on the *Send to* field.

## Unlocking a Proposal for Editing

Occasionally, Coeus will indicate with a popup message that you cannot access a proposal because it is locked for editing. If it is your username that has locked a proposal, then you have the ability to unlock the proposal. If a different user has locked the proposal, you will have to have that user unlock the proposal, or contact [coeus-help@mit.edu](mailto:coeus-help@mit.edu).



**Tip!** Be sure that your proposal is not minimized out of view before you unlock it. If you are trying to open a proposal that is already open, you may think the proposal is locked, but it is not. If you unlock a proposal that is already open, you could lose any data that is unsaved. Before you try to unlock a proposal, make sure it is not minimized.

➡ **To unlock a proposal for editing:**

You can unlock any proposal that is locked under your username from any window in Coeus.

1. Go to **File > Current Locks** on the menu bar.
2. Click the [**Refresh**] button to be sure that the list is current.
3. Highlight any proposal that you would like to unlock.
4. Click the [**Delete**] button.



**NOTE:** This will delete the lock on the proposal, not the proposal itself.

5. Click [**Yes**] to the dialogue box that asks “Are you sure you want to delete the lock...?”
6. Click the [**Close**] button to close the Current Locks window.

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## Appendix A – Narrative Types

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### **NSF**

#### **Narrative types that are used for NSF**

- **PersonalData** (NSF cover page)
- **ProprietaryInformation** (NSF cover page)
- **Other** (RR\_Other\_Projects – this is where supplementary docs go)
- 

#### **Proposal Questions that are used for NSF-specific grants.gov forms**

- NSF beginning investigator (NSF cover page)
- NSF Small Grant for Exploratory research (NSF cover page)
- Are you serving or have you ever served as a PI (NSF cover page)
- High Resolution graphics (NSF cover page)
- Is this related to preliminary application (NSF application checklist)
- Application is certified (NSF application checklist)
- Historical sites are affected (NSF cover page)
- Lobbying Activities have been conducted (NSF cover page)

#### **Proposal abstracts that are used on NSF grants.gov-specific forms**

- Deviation authorization (NSF Deviation Authorization)
- Suggested Reviewers (NSF\_SuggestedReviewers)
- Reviewers not to include (NSF SuggestedReviewers)

### **NIH**

#### **Narrative types that are used for NSF**

- They all start with **PHS**

#### **Proposal Questions that are used for NIH-specific grants.gov forms**

- Do you have any new inventions or patents (PHS398 checklist)
- PI change (PHS398 checklist)
- Institution change (PHS398 checklist)
- Stem cells (PHS Cover page supplement)
- Phase III Clinical trial (PHS Cover page supplement)
- NIH Beginning investigator (PHS Cover page supplement)

## **OTHER AGENCIES**

### **Narrative types that are used for other grants.gov forms**

- **Narrative** (RR\_OtherProjects)
- **Project Summary** (RR\_OtherProjects)
- **Bibliography** (RR\_OtherProjects)
- **Facilities** (RR\_OtherProjects)
- **Equipment** (RR\_OtherProjects)
- **Other** (RR\_OtherProjects)
- **Budget justification** (RR\_Budget)
- **PreApplication** (RR\_SF424)

### **Proposal questions that are used on other grants.gov forms**

- Is this proposal being submitted to other agencies? (RR\_SF424)
1. Proprietary or Privileged Info. contained in the App.(RR\_OtherProjectInfo)
    - Violation of Environmental Reg (RR\_OtherProjectInfo)
    - Project involves the Intern'l Cooperative activities (RR\_OtherProjectInfo)

### **Clarification of the 'Other' and "Other Attachment Form" issue**

The narrative type **Other\_Attachments\_Form** is used for a specific Grants.gov form called **Other Attachments Form**. This can include up to 100 attachments.

The narrative type **Other** is for attachments that are in the RR\_OtherProjectInfo form.

Note: We have only programmed for version 1.0 of all forms.