CoeusLite 4.4.1
Proposal Development
User Guide

Coeus® Version 4.4.1
Web-based application for preparing, routing, and submitting proposals

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All examples and figures created in the Coeus Consortium Test Instance

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Introduction

CoeusLite Proposal Development allows users to prepare and view proposal funding applications and then route the completed applications for internal approval. Institution Administrators can view proposal funding applications. Institute Approvers can view, approve, or reject proposals for correction. Proposals prepared in CoeusLite are fully compatible with Coeus Premium for submission to Grants.gov by Institute Authorized Administrators.

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

Accessing CoeusLite Proposal Development:

Contact your university Coeus administrator to establish your Coeus User ID and assign the Coeus proposal creator role in your unit.

Your Coeus Administrator will provide you with the URL address where you will access the software. You may also need valid certificates to access your university’s Coeus website.
Overview of Screen Navigation:

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

Select anywhere on the Proposal Line to open it.

Identifying View Modes: Modify versus View Only

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

Red warning notes another user has a lock on this proposal. You are in View Only Mode: you cannot edit this area of the proposal unless the other user exits.

You are in Modify Mode: you can edit this proposal. (No red warning; darker text in fields, drop down lists active)
Multiple Users in Modify Mode: CoeusLite versions 4.3 and higher allow multiple users to access the proposal in modify mode: one user access to modify the General Info and Upload Narratives screens while another user simultaneously modifies the Budget. Coeus Premium can support three users editing/modifying a proposal simultaneously (Details, Narratives, or Budget).

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

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

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

Locating Proposals in CoeusLite

All Proposals

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

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

Proposal Search

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

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

Result: Select proposal, search again, or close the search window.
Preview a Grants.gov Opportunity

**Grants.gov Opportunity Search**

The **Grants.gov Opportunity Search** window allows you to enter the CFDA number or Sponsor Opportunity ID number to perform the search and review the results.

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

Review Opportunity details:

- **Click to >> to expand detail pane**
- **Click << to reduce detail pane**

**New Feature!**

- Title: NIH Test Opportunity (R01)
Create Proposal from the Grants.gov Opportunity Search

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

Complete the mandatory fields (*) and Save. The Grants.gov logo will appear once the record is successfully saved.

The Funding Opportunity Number (Opportunity ID) and CFDA Number fields are pre-populated when both data points were provided from the selection.

With the required fields maintained & saved, the Grants.gov logo indicates this proposal is linked to an opportunity. Open the Grants.gov panel to review the opportunity submission details and

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

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1. 4.4 COEUSQA-1987 New interface for S2S Web service - Opportunity search to Proposal Create
Create a New Proposal:

Create New Proposal

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

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

Proposal Development: Initial entry screen

Use the Navigation Panel buttons to navigate your proposal. Don’t use your Browser’s “back” or “forward” buttons – these functions are not supported for use in navigation in Coeus.
### Navigating the CoeusLite Screens:

<table>
<thead>
<tr>
<th>Navigation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Info</strong></td>
<td>Enter specific details required to save and create a proposal. This panel will always be the first screen presented when a proposal is selected.</td>
</tr>
<tr>
<td><strong>Organization</strong></td>
<td>Displays the contact information of the submitting organization, performing organization, and allows users to add performing sites of additional locations.</td>
</tr>
<tr>
<td><strong>Investigators/Key Persons</strong></td>
<td>Add Investigators and Key Persons and customize their unit, roles, contact and degree details. Certify Investigators.</td>
</tr>
<tr>
<td><strong>Credit Split</strong></td>
<td>Enter credit allocation specifics for Investigators as defined by your institutional business practices.</td>
</tr>
<tr>
<td><strong>Special Review</strong></td>
<td>Enter information for research requiring special review or approval such as use of animals or human subjects.</td>
</tr>
<tr>
<td><strong>Abstract</strong></td>
<td>Enter text in appropriate tab screens to populate specific sponsor forms.</td>
</tr>
<tr>
<td><strong>Others</strong></td>
<td>Institutionally defined field.</td>
</tr>
<tr>
<td><strong>YNQ</strong></td>
<td>Enter answers to compliance questions required by your Institute, the sponsor, or both.</td>
</tr>
<tr>
<td><strong>Proposal Roles</strong></td>
<td>Add or remove user access to your proposal.</td>
</tr>
<tr>
<td><strong>Questionnaire</strong></td>
<td>Heading for Questionnaires. Locally defined and applied Questionnaires will display in this category.</td>
</tr>
<tr>
<td><strong>Grants.Gov</strong></td>
<td>Links the proposal to a Grants.gov opportunity; displays opportunity details, forms, and submission status.</td>
</tr>
<tr>
<td><strong>Budget</strong></td>
<td>Navigates to the budget screens.</td>
</tr>
<tr>
<td><strong>Upload Attachments</strong></td>
<td>Navigates to the file upload screens.</td>
</tr>
<tr>
<td><strong>Validate</strong></td>
<td>Performs the locally defined validation checks and s2s validations if a Grants.gov opportunity has been selected and saved.</td>
</tr>
<tr>
<td><strong>Submit for Approval</strong></td>
<td>Starts Complete &amp; Validated proposals routing for internal approval.</td>
</tr>
<tr>
<td><strong>Print</strong></td>
<td>Navigates to the print options screen to print the Grants.gov forms, generic forms, or sponsor paper-submittal forms from your Coeus proposal data.</td>
</tr>
<tr>
<td><strong>Copy Proposal</strong></td>
<td>Allows authorized users to copy all or part of the proposal to a new proposal.</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td>Navigates to the email notification function that allows users to generate and send email messages.</td>
</tr>
<tr>
<td><strong>Add New Rolodex Entry</strong></td>
<td>Create a non-Institute investigator, performing site, contact, or key person Rolodex.</td>
</tr>
</tbody>
</table>
1. Navigate to the General Info screen:

**General Info**

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

A. Enter your proposal information:

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Proposal Type</td>
<td>Select the appropriate entry from the drop-down list. This information might be specified in the sponsor’s announcement or guidelines.</td>
</tr>
<tr>
<td>* Activity Type</td>
<td>Select the appropriate entry from the drop-down list.</td>
</tr>
<tr>
<td>* Start Date</td>
<td>Date the project is expected to start. Enter in mm/dd/yy format or use the calendar tool.</td>
</tr>
<tr>
<td>* End Date</td>
<td>Date the project is expected to end. Enter in mm/dd/yy format or use the calendar tool.</td>
</tr>
<tr>
<td>Original Proposal Number</td>
<td>Required if the Proposal Type is Resubmission, Revision or Continuation. Use the Search icon to search the Institute Proposal module.</td>
</tr>
<tr>
<td>Award # (number)</td>
<td>Required if the Proposal Type is Continuation, Renewal, or Revision. Leave this field blank for New, Resubmission, or Task Order. The Award # is a Coeus-generated number; to find it use the Search icon next to the field and search by Account number or other detail.</td>
</tr>
<tr>
<td>* Agency/Sponsor</td>
<td>The sponsor is the organization that will provide funding. Enter the sponsor’s six-digit code in this field or use the Search icon to find it.</td>
</tr>
<tr>
<td>Prime Sponsor</td>
<td>If your institution will be the subcontractor for the proposal, the prime sponsor is the agency providing funds to your sponsor. If not, leave this field blank.</td>
</tr>
<tr>
<td>Proposal deadline date</td>
<td>Date the proposal is due at the sponsor.</td>
</tr>
<tr>
<td>Receipt/Postmarked</td>
<td>Select which option defines the deadline receipt requirement.</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>NSF Science Code</td>
<td>Select this code from the drop-down list for all proposals, not just for NSF submissions. Data used to aid institutional annual reporting requirements.</td>
</tr>
<tr>
<td>Anticipated Award Type</td>
<td>Select the type from the drop-down list, if known.</td>
</tr>
<tr>
<td>Sponsor Proposal No. (number)</td>
<td>Required if the Proposal Type is Renewal, Resubmission, Revision, or Continuation. Search the Award module or Institute Proposal module, as appropriate, to find this number.</td>
</tr>
<tr>
<td><strong>Title:</strong></td>
<td>Enter the descriptive title. For electronic submission, the title can contain no special characters. 200 character maximum; individual sponsors may require shorter titles. Refer to the sponsor instructions.</td>
</tr>
<tr>
<td>Program Title:</td>
<td>Enter a program title provided by the sponsor. If this proposal will be submitted via Grants.gov, this field will be overwritten when you associate the proposal with a Grants.gov opportunity.</td>
</tr>
<tr>
<td>Proposal in Response to:</td>
<td>Select an entry from the drop-down list to identify how this funding opportunity was announced.</td>
</tr>
<tr>
<td>Subcontract</td>
<td>Select this checkbox if one or more subcontracts will be included in this proposal. If there will be no subcontracts, leave it unchecked.</td>
</tr>
<tr>
<td>Funding Opportunity Number</td>
<td>For paper submissions: enter data manually. For Grants.gov submissions: this will be populated automatically if CFD is used to search and link. Otherwise, insert the Funding Opportunity Number to perform the Grants.gov search.</td>
</tr>
<tr>
<td>CFDA Number:</td>
<td>Catalog of Federal Domestic Assistance number assigned by sponsor for funding opportunity. For paper submissions: enter the data manually, if known. For Grants.gov submissions, enter the CFDA number to support the Grants.gov search. Note: some NIH opportunities do not assign CFDA numbers until after award. Use the Funding Opportunity search for those applications and leave the CFDA field blank unless it is populated automatically by the selected Grants.gov opportunity.</td>
</tr>
<tr>
<td>Agency Program Code:</td>
<td>Enter this number if it is required for the opportunity. Locate the code in the announcement of opportunity, at Grants.gov, or the sponsor's web site. This code is currently required only for NSF submissions, but it may be used by other agencies in the future.</td>
</tr>
<tr>
<td>Agency Division Code:</td>
<td>Enter this number if it is required for the opportunity. Locate the code in the announcement of opportunity, at Grants.gov, or the sponsor's web site. This code is currently required only for NSF submissions, but it may be used by other agencies in the future.</td>
</tr>
</tbody>
</table>

2. Select **Save**

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

<table>
<thead>
<tr>
<th>Investigator:</th>
<th>Proposal #: 00000421 (In Progress)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency/Sponsor: 000340 : NIH</td>
<td>Proposal Period: 05/01/2010 - 05/31/2013</td>
</tr>
<tr>
<td>Title:</td>
<td>How many licks does it take to get to the center of a Tootsie...</td>
</tr>
<tr>
<td>Lead Unit:</td>
<td>150001 : Center for Coeus Training</td>
</tr>
<tr>
<td>Last Updated:</td>
<td>2009-10-02 11:36:59.0 by Tester07</td>
</tr>
</tbody>
</table>
B. For Grants.gov System-to-System (S2S) Candidates:

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

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

1. **Navigate to the Grants.gov screen:**

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

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

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

         ![Grants.gov search results](image)

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

         ![Instruction url](image)

         3. Click on **Select** to choose this opportunity and retrieve the submission requirements, or click **hide** to close the detail panel; click **show** or **Select** another opportunity;
b. Results of selecting a Grants.gov opportunity package (default view):

Logo indicates link.

Selected opportunity details & hyperlink to sponsor posted instructions.

Sponsor-required forms are pre-checked to Mandatory & Include for this application.
1. Review list of required forms (forms must be marked **Available** in the **Desc** column if required for this s2s submission.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Mandatory</th>
<th>Include</th>
<th>Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFLL V1-1</td>
<td></td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>ANA_ApplicationInfo</td>
<td></td>
<td>X</td>
<td>Not Available</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Mandatory</th>
<th>Include</th>
<th>Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget V1-1</td>
<td>☑</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>Other Attachments V1-1</td>
<td>☑</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>SF 424 V2</td>
<td>☑</td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>Attachments V1-1</td>
<td></td>
<td></td>
<td>Available</td>
</tr>
<tr>
<td>CD511 V1-1</td>
<td></td>
<td></td>
<td>Available</td>
</tr>
</tbody>
</table>

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

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

- **Not active until proposal is submitted to Grants.gov**
- **Change the opportunity selected (only valid if multiple listed in one posting)**
- **Removes the opportunity; deletes Program Title; Funding Opportunity & CFDA from the General info Screen**
- **Performs validation on Select to Print checked forms**
- **Generates printable PDFs of selected forms**

- **Default Type = Application**
- **Alternates: Pre-Application and Change/Corrected**

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

- **Save the selected opportunity and forms selected.**
- **S2S submission is not supported in this version of Coeus.**
2. Navigate to the Organization Screen to enter Additional Performing Organizations or Sites

The Organization screen contains the contacts for your Institute and performing sites involved in the project. The data for your institution has been maintained by your Coeus Administrator, but may be modified for individual submissions.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Organization</td>
<td>The legal entity for the proposal. When a proposal is created, this defaults to the organization listed in the lead unit’s organization field.</td>
</tr>
<tr>
<td>Performing Organization</td>
<td>The organization performing the main portion of the project. There is only one, and for many institutions, this will likely be the same as the Proposal Organization. Multi-campus institutions may have Research Foundations or other centralized oversight office listed as the Proposal Organization and their specific campus or school as the Performing Organization.</td>
</tr>
<tr>
<td>Other Organization/Location</td>
<td>Other Organizations are other participants in the project, often recipients of a subcontract.</td>
</tr>
<tr>
<td>Performance Site/Location</td>
<td>A site where work is being done that is not an organization (e.g. a volcano, a field camp location, or other significant off campus location that should be recognized in the proposal).</td>
</tr>
</tbody>
</table>

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

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

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

For Other Organizations, the Coeus Organization Table will be searched and the returned result will include the Location, Address, and Congressional District. Users can modify the district by deleting returned result and adding a new congressional district field. Using Other Organization will support populating DUNS Number to certain sponsor forms.

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

1. Click Add Organization/Location to create additional panels.
To add an Other Organization from the Coeus Organization Table.

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

Use the **Search** function to locate the Organization.

Search for Organization. Selection from Results will populate here.
To add a Performance Site (Location Address) from the Coeus Rolodex.

Select **Add Organization/Location**

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

To Delete Other Organizations or Performance Sites:
Select **Remove** (Type) to delete the entry.

To Delete Congressional Districts:
Select **Remove** (Cong. Dist) to remove the entry.

If all districts in a state are affected, enter “all” for the district number (ex. HI-all)
If nationwide (all districts in all states), enter US-all
If the program/project is outside the U.S., enter 00-000
3. Navigate to Investigators & Key Personnel

**Investigators/Key Persons**

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

- **Employee Search** Employee Search will locate persons maintained in Coeus from your HR system.
- **Non Employee Search** Non Employee Search will locate persons maintained in the Coeus Rolodex.

B. **Edit** the PI’s maintained data:

1. **Modify** or revise contact information
2. **Enter** Commons User Name (For any Grants.gov submission using the R&R Senior/Key Person Profile form. this field will populate the “Credential” field, e.g. agency login”
3. **Enter** estimated percent of effort over the proposed project period
4. **Enter** estimated Academic/Summer/Calendar year effort
5. **Select** Multi PI, if relevant to your submission (see key box below).
6. **Select Save**

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

**Result:** Saved person is added to lower pane List of Investigators/Key Study Personnel
C. Search and add Co-Investigators and Key Study Persons. (Other Proposal Roles can only be added after a PI is entered and saved)

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

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

When Key Study Person is the selected Proposal Role; Key Person Role field is presented. Entering this project role is mandatory.
D. Review Proposal Personnel

1. **Name**: list of Investigators and Key Persons in order of entry.

2. **Department**: is the primary unit for the listed person.

3. **LU**: is the Lead Unit for this proposal.

4. **MPI**: check mark will populate to designate Multi PI.

5. **Role**: is the Proposal Role applied or entered for the listed person.

6. **% Effort**
   
   a. **T** is Total effort
   
   b. **A** is Academic effort
   
   c. **S** is Summer effort
   
   d. **C** is Calendar effort

7. **Remove**: use to delete the named person entry.

8. **Certify**: open the Certify Investigator window and answer, review or print the answered questions.

9. ![Cross](x) Signifies certification is not completed.

   ![Checkmark](✓) Signifies certification is complete.

10. **Details**: select to open the Person Detail window to review, add, or modify contact and degree information.

---

Green check mark indicates Certification is complete.
E. Customize Proposal Person Details

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

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

   a. Select Add Unit

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

![Search window](image)

**Use Search to locate Unit Number**

- **Select Search** to locate centrally maintained Units.
- **Enter search criteria** to locate Unit number.
- **Select a Unit**, search again, or close the window.
- **Confirm selection**: Unit applied to Proposal Person Details.
- **Select Save** at the bottom on the screen.
2. **Person Details**: revise any white-background field entries as required for this proposal.

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

A. Modify entries as needed. White-background fields are editable.
B. Insert eRA Commons User ID if it wasn’t entered during Add Person process.
C. Provide Full Address, Phone and E-mail for Grants.gov submissions.

<table>
<thead>
<tr>
<th>Person Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name:</td>
</tr>
<tr>
<td>Email Address:</td>
</tr>
<tr>
<td>Primary Title:</td>
</tr>
<tr>
<td>Home Unit:</td>
</tr>
<tr>
<td>eRA Commons User Name:</td>
</tr>
<tr>
<td>Pager:</td>
</tr>
<tr>
<td>Office Location:</td>
</tr>
<tr>
<td>Address Line 1:</td>
</tr>
<tr>
<td>County:</td>
</tr>
<tr>
<td>Postal Code:</td>
</tr>
</tbody>
</table>

3. **Degree Details**:  
**Review and modify degree data**, if any, imported from your HR system; Add Degrees, Delete Degrees (not shown) if incorrect.

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

<table>
<thead>
<tr>
<th>Degrees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree Type</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td>Add Degree</td>
</tr>
</tbody>
</table>

Add Degree

<table>
<thead>
<tr>
<th>Degrees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree Type</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td>Master of Information Systems</td>
</tr>
</tbody>
</table>

Add Degree
4. Certify Investigators

Open the Certify window from either the Person Details:

Or open Certify from the List of Investigator/Key Personnel panel:

- Select Certify for the investigator you want to certify to open the Certification window
- Review the questions and select the appropriate answer in the electronic certificate.
- Select Save to save your responses.
- Select Print Certification to generate a print-ready PDF file for the investigators signature.
- Select Return to Investigator to close the Certify window.

**TIP:** You must SAVE the answered Certification questions before you can print. Click Save first and then Print Certification.

**Result:** The green check indicates that the Certification is complete for this investigator.
4. Navigate to Credit Split

The columns displayed are locally defined via the code table: Others > Investigator Credit Type.
Also maintainable is whether the entered values must sum to 100 or not.

**Business practice instructions must be provided by local Coeus Administrators**
### 5. Navigate to Special Reviews

**Special Review**

<table>
<thead>
<tr>
<th>Special Reviews</th>
<th>[Proposal No. - 00003592]</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Indicates Required Fields</td>
<td></td>
</tr>
</tbody>
</table>

**Special Review**

<table>
<thead>
<tr>
<th>Special Review</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Special Review:</td>
<td>*Approval:</td>
</tr>
<tr>
<td>Protocol No:</td>
<td>Application Date:</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
</tr>
</tbody>
</table>

**Save**

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

1. **Click** the drop-down box in the field labeled Special Review
2. **Select** the type of Review that applies to the proposed project. *(Locally Maintained Review Type listing)*
3. **Click** the drop-down box in the field labeled Approval
4. **Select** a status appropriate to the review. *(Locally Maintained Review Status listing)*
   
   If:
   - The status is Pending, then all required information has been entered
   - The status is Submitted, and then the Application Date of the Regulatory Review must be entered.
   - The status is Approved, then a protocol number must be entered in the Protocol Number field and an approval date entered into the Approval Date field.
   - The status is Exempt, and then the exempt code (letter and number, i.e. E4) must be entered in the Comments field. Multiple exempt codes should be separated by a comma (i.e. E1,E4).

5. **Save** the entry.

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

**Special Review**

<table>
<thead>
<tr>
<th>Special Review</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Special Review:</td>
<td>*Approval:</td>
</tr>
<tr>
<td>Protocol No:</td>
<td>Application Date:</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
</tr>
</tbody>
</table>

**List of Special Review**

<table>
<thead>
<tr>
<th>Special Review</th>
<th>Approval</th>
<th>Protocol No</th>
<th>Application Date</th>
<th>Approval Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Usage</td>
<td>Pending</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Results:**

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

This screen contains Custom Elements – fields that can be locally defined by your institution to provide additional data in your proposal record.
7. Navigate to Abstracts

Abstracts are text boxes for specific subjects. The entries are used by Coeus to populate certain sponsor forms. See the sponsor instructions, and the Coeus s2s Form Guides®, to determine if an Abstract should be used (as a requirement or option) in your proposal.

1. Select abstract type to navigate to that abstract text entry panel
2. Enter or paste in text.
3. Save

Abstract selections – click to navigate to this entry panel.

Blinking cursor: type or paste in text. See sponsor instructions for content requirements.

Check denotes Abstract text entered. Color text identifies text pane in focus.

Identity of User who entered data and the timestamp of this action.

See the Consortium Document: S2S Form Guides: User Guides for Proposal Development system-to-system forms

Rosemary Hanlon, Coeus Consortium Business Intelligence Liaison
8. Navigate to YNQ: Yes No Questions

Locally Maintained – Details of YNQ's must be provided by local Coeus Administrators

YNQ

YNQ:

General  Proposal

Question Id  Question

34  Can you regulate the number of proposals from Researcher X?

   Yes  No  N/A  More

Save

Answers to these compliance questions are required by the Institute, the sponsor, or both.

1. Answer all questions on the YNQ screen by clicking on the radial button.
2. Use More to read additional information about this question, if available.
3. Save the answers.

Many YNQ's are locally maintained. Admin > YNQ to open the Questions window. The “Applies to Proposal” Questions populate YNQ. “Applies to Financial Entity”: populates forms.
9. Assign Proposal Roles

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

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aggregator</td>
<td>Make changes to any part of the proposal, answer yes/no questions, certify investigators, submit for approval</td>
</tr>
<tr>
<td>Approver</td>
<td>Approve the proposal. You cannot add or delete users from this role, but you can see which users have been designated as approvers after the proposal is routed for approval. The list of approvers is maintained by Coeus administrators.</td>
</tr>
<tr>
<td>Budget creator</td>
<td>Create and edit the budget.</td>
</tr>
<tr>
<td>Narrative writer</td>
<td>Create and edit the narratives.</td>
</tr>
<tr>
<td>Viewer</td>
<td>View any part of the proposal. Cannot edit.</td>
</tr>
</tbody>
</table>
10. Questionnaire

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

Open the Questionnaire by clicking the questionnaire name.

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

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

The "More" button may contain additional information to help you understand and answer the question.

**Previous** allows a user to scroll back to the last question answered.

**Start Over** to return to the beginning of the Questionnaire and begin again. All prior answers will be deleted

**Modify** to open a previously completed Questionnaire.

**Print** will open a new browser window with a PDF report of the questions and any answers entered if the questionnaire has not been completed.

---

2 Proposal data requirements for populating Grants.gov forms are being relocated from YNQ to Questionnaire, where it is possible to maintain form and/or sponsor-specific questionnaires.
### 11. Navigate to Budget

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

<table>
<thead>
<tr>
<th>Proposal Navigation Menu</th>
<th>Budget Navigation Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ General Info</td>
<td>✓ Return To Proposal</td>
</tr>
<tr>
<td>✓ Organization</td>
<td>✓ Budget Versions</td>
</tr>
<tr>
<td>Investigators/Key Persons</td>
<td>✓ Budget Summary</td>
</tr>
<tr>
<td>Credit Split</td>
<td>✓ Print</td>
</tr>
<tr>
<td>Special Review</td>
<td></td>
</tr>
<tr>
<td>Abstract</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>✓ Adjust Periods</td>
</tr>
<tr>
<td>YNQ</td>
<td>✓ Proposal Rates</td>
</tr>
<tr>
<td>✓ Proposal Roles</td>
<td></td>
</tr>
<tr>
<td><strong>Questionnaire</strong></td>
<td>✓ Validate</td>
</tr>
<tr>
<td>PHS Fellowship required form data</td>
<td></td>
</tr>
<tr>
<td>Grants.Gov</td>
<td>Budget Set Up</td>
</tr>
<tr>
<td><strong>Budget</strong></td>
<td>✓ Personnel</td>
</tr>
<tr>
<td>Upload Attachments</td>
<td>✓ Validate</td>
</tr>
<tr>
<td></td>
<td>Budget Periods</td>
</tr>
<tr>
<td>Validate</td>
<td>Personel Budget</td>
</tr>
<tr>
<td>Submit for Approval</td>
<td>Equipment</td>
</tr>
<tr>
<td></td>
<td>Travel</td>
</tr>
<tr>
<td></td>
<td>Participant/Trainee</td>
</tr>
<tr>
<td></td>
<td>Other Direct Costs</td>
</tr>
<tr>
<td></td>
<td>Modular Budget</td>
</tr>
<tr>
<td></td>
<td>Cost Sharing Distribution</td>
</tr>
<tr>
<td></td>
<td>Under Recovery Distribution</td>
</tr>
<tr>
<td></td>
<td>Project Income</td>
</tr>
<tr>
<td></td>
<td>Generate All Periods</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Proposal Print</td>
</tr>
<tr>
<td></td>
<td>Click on the link to open report (opens in new window)</td>
</tr>
</tbody>
</table>

### Viewing the Budget using the Print Feature

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

<table>
<thead>
<tr>
<th>Return To Proposal</th>
<th>Select to return the general proposal navigation panel.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Budget Versions</strong></td>
<td>Displays a summary line for all budget versions created. Default budget launch screen when more than one budget version exists.</td>
</tr>
<tr>
<td><strong>Budget Summary</strong></td>
<td>Displays summary budget information; i.e. budget totals, direct and indirect costs, underrecovery, cost sharing, period budget totals, etc.</td>
</tr>
<tr>
<td><strong>Print</strong></td>
<td>Navigates to the Budget print options screen</td>
</tr>
<tr>
<td><strong>Budget Set Up</strong></td>
<td>Group header for budget set up screens</td>
</tr>
<tr>
<td><strong>Personnel</strong></td>
<td>Add personnel for budgeting; enter salary details required for expense calculations.</td>
</tr>
<tr>
<td><strong>Adjust Periods</strong></td>
<td>Allows users to modify budget start and end dates, or to add or modify budget periods, or period lengths.</td>
</tr>
<tr>
<td><strong>Proposal Rates</strong></td>
<td>Displays institute overhead rates; allows for insertion of applicable rates.</td>
</tr>
<tr>
<td><strong>Validate</strong></td>
<td>Use the Validate tool to process any maintained Budget Business Rule Validations.</td>
</tr>
<tr>
<td><strong>Budget Periods</strong></td>
<td>Group header for Budget Costs Input screens</td>
</tr>
<tr>
<td><strong>Personnel Budget</strong></td>
<td>Add or remove personnel expense, customize their effort and time spent on this project.</td>
</tr>
<tr>
<td><strong>Equipment</strong></td>
<td>Add or remove equipment expenses</td>
</tr>
<tr>
<td><strong>Travel</strong></td>
<td>Add or remove travel expenses</td>
</tr>
<tr>
<td><strong>Participant/Trainee</strong></td>
<td>Add or remove participant/trainee expenses</td>
</tr>
<tr>
<td><strong>Other Direct Costs</strong></td>
<td>Add or remove all other expenses.</td>
</tr>
<tr>
<td><strong>Modular Budget</strong></td>
<td>Navigate to Modular Budget entry screen</td>
</tr>
<tr>
<td><strong>Cost Sharing Distribution</strong></td>
<td>Navigate to Cost Sharing Distribution entry screen</td>
</tr>
<tr>
<td><strong>Under Recovery Distribution</strong></td>
<td>Navigate to Under Recovery Distribution entry screen</td>
</tr>
<tr>
<td><strong>Project Income</strong></td>
<td>Navigate to Project Income entry screen</td>
</tr>
<tr>
<td><strong>Generate All Periods</strong></td>
<td>Calculate budget periods based on period 1 entries and create required additional budget period screens.</td>
</tr>
</tbody>
</table>
Before you start your budget...

A note about Coeus Budget Calculations

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

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

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

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

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

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

Initial Budget screen Access – Budget Set up requirements.

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

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

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

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

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

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

Budget Setup | Personnel

A. Add and complete Budget Personnel entries

1. **Navigate** to Personnel entry screen
2. **Search** for and **Add** the proposal personnel needed for your project budget. (Research staff, Support staff, Postdoctoral Associates, Graduate Students, or To-Be Announced staff, etc.):
   - **Add Employee** Employee Search will locate persons maintained in Coeus from your HR system.
   - **Add Non Employee** Non Employee Search will locate persons maintained in the Coeus Rolodex.
   - **Add TBA** Add TBA Search will locate a predefined list of to-be-announced persons by job title. (i.e. Project Manager, Graduate Student, etc.)

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

Budget Persons populated from Investigator/Key Persons:

- **Select Add Employee** to search the HR database or select Add Non Employee to search the Rolodex.
- **Please enter search criteria of the form *value* or *value or value* in any of search fields.**

- **Search** for the employee by entering data into the fields on the search screen.
  - Entering Last Name and First Name is usually sufficient, use other fields to help narrow down searches.
  - Use the asterisk (*) before and after data in fields to widen searches and minimize typed entries.
- **Select** search to display the search results.
Select the appropriate person displayed in the Person Search Results screen. Take time to scroll across the entire window to be sure you’ve selected the correct person – some individuals may appear more than once.

Add TBA:

To add unnamed personnel (personnel that will be staffed but for whom you have not yet hired or assigned):

- Select Add TBA
- Select on the appropriate category displayed in the TBA Persons window. Local customization.
- Save

Result of Add TBA selection:

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Code</th>
<th>Appointment Type</th>
<th>Eff Date</th>
<th>Base Salary</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hanlon, Rosemary</td>
<td>OOH20</td>
<td>REG EMPLOYEE</td>
<td>07/01/2008</td>
<td>$100,000.00</td>
<td>Remove</td>
</tr>
<tr>
<td>Seuss, Doctor</td>
<td>SLC17</td>
<td>REG EMPLOYEE</td>
<td>01/01/2008</td>
<td>$90,000.00</td>
<td>Remove</td>
</tr>
<tr>
<td>Computer Programmer</td>
<td>99999</td>
<td>REG EMPLOYEE</td>
<td>01/01/2008</td>
<td>$80,000.00</td>
<td>Remove</td>
</tr>
</tbody>
</table>
3. **Enter Eff Date** The Effective Date displayed automatically defaults to the start date of the proposal period. For Coeus to generate the most precise salary inflation, change the Effective Date to match the date of that employee scheduled increase. Refer to your departmental personnel administrator or HR for specific policy.

   - Faculty, Students and other Academic Appointments: **June 1 (or locally maintained)**
   - Sponsored Research Staff: **January 1 (or locally maintained)**
   - Administrative Staff: **July 1 (or locally maintained)**
   - Support Staff: **April 1 (or locally maintained)**

4. **Enter Base Salary**: Enter the person’s full current annual salary – *as it relates to the length of appointment entered*. The value should be as of the date of the last known salary increase. Do not use commas.

   - **Job Code**: This field is a required field populated by the HR data feed or Coeus. This data field is used to help distinguish one line item from another.

   - **Appointment Type**: Will be populated by the HR data feed. Review that this information is correct, as it is part of the calculation that charges salary to the budget. If you need to make a change, select the appropriate appointment type from the dropdown list.
      - The “M” refers to months of appointment; i.e., a professor with a 9-month appointment will display as **9M DURATION**.
      - **REG EMPLOYEE** refers to a Regular Employee with a 12-month salary base.
      - **SUM EMPLOYEE** refers to a Summer Appointments (not faculty summer salary).
      - **TMP EMPLOYEE** refers to a Temporary Appointment, use with a Monthly base salary level.

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

5. Enter the **Anniversary Date**: **NOTE: this field may not appear in your local environment.** If your institution uses individual anniversary dates for annual salary inflation, the **Annv Date** column should be maintained with a date. The date may automatically populate from Coeus Person data, otherwise, enter the date manually. Coeus will still use the rates table personnel categories to determine the percent to inflate, but will use the individual anniversary dates instead of the category dates.

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

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

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

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

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

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

Once you have made the necessary changes, select Save.

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

Don’t forget to Sync your Rates! (Navigate to the Rates screen). And don’t forget to review & update salaries and their effective dates! (Navigate to Budget Set Up: Personnel)
**NEW** No. of Months (in budget period). Resulting from COEUSQA-1590 better supports the generation of project periods greater than or less than 12 months, the number of months in each budget period has been added to the Budget Summary screen and each Period tab header.

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

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

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

**Note the default Start Date & End Date span the full 18 months of this project period 2.**
For Non-Personnel Expenses:

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

<table>
<thead>
<tr>
<th>Line Item Details</th>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2011</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>06/30/2011</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td>$50,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Underrecovery</td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost Sharing</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>On Campus</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Rates Applicable to the Line Item

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td>☑️</td>
<td>$34,000.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
</table>
C. Proposal Rates

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

<table>
<thead>
<tr>
<th>Activity Type: Organized Research</th>
<th>F and A</th>
<th>Fringe Benefit</th>
<th>Inflation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate Type</td>
<td>On Off Campus</td>
<td>Fiscal Year</td>
<td>Start Date</td>
</tr>
<tr>
<td>F and A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.5%</td>
<td>Off</td>
<td>2009</td>
<td>07/01/2009</td>
</tr>
<tr>
<td>6.0%</td>
<td>On</td>
<td>2009</td>
<td>07/01/2009</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fringe Benefits</th>
<th>On Off Campus</th>
<th>Fiscal Year</th>
<th>Start Date</th>
<th>Institute Rate</th>
<th>Applicable Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Rate</td>
<td>Off</td>
<td>2006</td>
<td>07/01/2007</td>
<td>21.0</td>
<td>21.0</td>
</tr>
<tr>
<td>Research Rate</td>
<td>On</td>
<td>2008</td>
<td>07/01/2008</td>
<td>34.0</td>
<td>34.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inflation</th>
<th>On Off Campus</th>
<th>Fiscal Year</th>
<th>Start Date</th>
<th>Institute Rate</th>
<th>Applicable Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Salaries (S1)</td>
<td>Off</td>
<td>2009</td>
<td>06/01/2009</td>
<td>3.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (S1)</td>
<td>On</td>
<td>2009</td>
<td>06/01/2009</td>
<td>3.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (S1)</td>
<td>Off</td>
<td>2009</td>
<td>06/01/2009</td>
<td>3.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (S1)</td>
<td>On</td>
<td>2009</td>
<td>06/01/2009</td>
<td>3.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (S1)</td>
<td>Off</td>
<td>2010</td>
<td>06/01/2010</td>
<td>3.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (S1)</td>
<td>On</td>
<td>2010</td>
<td>06/01/2010</td>
<td>3.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (S1)</td>
<td>Off</td>
<td>2011</td>
<td>06/01/2011</td>
<td>3.0</td>
<td>3.0</td>
</tr>
</tbody>
</table>

| Tuition | On | 2012 | 07/01/2011 | 5.0 |
| Vacation | On | 2012 | 07/01/2011 | 5.0 |

Rates are maintained centrally by your Coeus Application Administrator, but rates to be applied to this proposal can be entered on this rates screen.

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

If you make a mistake or change your mind, you can click Reset at the bottom of the screen to revert back to the Institute rates, and then Save.
To modify the applicable rates for this proposal:

1. Open the Proposal Rates screen.

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

Example: Review/Modify Faculty Inflation

<table>
<thead>
<tr>
<th>Inflation</th>
<th>Rate Type</th>
<th>On Off Campus</th>
<th>Fiscal Year</th>
<th>Start Date</th>
<th>Institute Rate</th>
<th>Applicable Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Salaries (5/1)</td>
<td>Off</td>
<td>2003</td>
<td>06/01/2006</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (5/1)</td>
<td>On</td>
<td>2003</td>
<td>06/01/2006</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (5/1)</td>
<td>Off</td>
<td>2003</td>
<td>06/01/2006</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (5/1)</td>
<td>On</td>
<td>2003</td>
<td>06/01/2006</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (5/1)</td>
<td>Off</td>
<td>2010</td>
<td></td>
<td></td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (5/1)</td>
<td>On</td>
<td>2010</td>
<td>06/01/2010</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (5/1)</td>
<td>Off</td>
<td>2011</td>
<td>06/01/2011</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (5/1)</td>
<td>On</td>
<td>2011</td>
<td>06/01/2011</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
</tbody>
</table>

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

Laboratory Allocation Rates cannot be viewed or modified per proposal in CoeusLite. These are negotiated rates, so they do not change frequently. If you require that a modified applicable rate, do this modification in the Coeus Premium proposal record (or request that a Coeus Premium user do this for you).
D. Navigate to Personnel Budget

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

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

   - **Select Save.**

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

### Personnel Budget

<table>
<thead>
<tr>
<th>Name</th>
<th>Salary Type</th>
<th>%Charged</th>
<th>%Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seuss, Doctor</td>
<td>Academic</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Hanlon, Rosemary</td>
<td>Academic</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>TBA - Project Coordinator</td>
<td>Academic</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Computer Programmer</td>
<td>Academic</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

- **Direct Cost**: $0.00
- **Indirect Cost**: $0.00
- **Total Cost**: $0.00

**Requested Salary**:

<table>
<thead>
<tr>
<th>Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Fringe Benefit</th>
<th>Funds Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seuss, Doctor</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Hanlon, Rosemary</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>TBA - Project Coordinator</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Computer Programmer</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

- **Subtotal of all personnel expenses**: $0.00

* Premium allows users to enter personnel expense on a line item without selecting a Budget Person (Add Person). This entry method requires no person detail so these entries cannot be modified in Lite. Also, without details, they cannot be displayed like the other personnel entries, but will be displayed below the detailed personnel and those expenses will be included in the **Total Funds Requested** for that period.

### Notes

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

### Instructions

- **Select Add Person** to insert more Persons.
- **Select Calculate** to see how entries impact budget.
- **Select Save** to calculate and save customized entries.
- **Any Premium-only personnel items will display below this line.**
2. Customize each Personnel Line Item:

- **Select** the appropriate **Salary Type** from the drop-down menu. See your departmental personnel administrator if you need help matching a salary type to personnel.

- **Select** the appropriate **Period** from the drop-down menu:
  - **Academic**: The 9-month academic year: September 1 through May 31.
  - **Calendar**: The 12-month calendar year.
  - **Cycle**: 12 month project period - same as Calendar
  - **Summer**: The 3 months not covered by the Academic period, June 1 through August 31.

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

- **Enter** % **Charged** and % **Effort**.
  - Equal amounts mean the entire expense will be paid by the sponsor.
  - % **Charged** is less than % **Effort**, will generate cost sharing (expense that will not be paid by the sponsor).

- **Edit** the **Start Date** and or **End Date** to either correctly reflect Faculty Summer Month effort, or remove eligible vacation time, or accurately reflect time spent on the project, as needed.

- **Select** **Save** when all added customized entries have been made.

- **Select** **Calculate** (located below all of the personnel entries) if you want to see how a changed entry impacts the budget.

- **Select** **Remove** to delete the person entered.

- **Select** **Edit** to open the Line Item Details window for that personnel entry.
3. Enter Personnel Line Item Details

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

**Line Item Details window:**

<table>
<thead>
<tr>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Seuss, Doctor,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Role: Undefined</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date: 01/15/2009</td>
<td>End Date: 12/31/2009</td>
<td></td>
</tr>
<tr>
<td>Cost: $22,302.82</td>
<td>Cost Sharing: $0.00</td>
<td>Underrecovery: $0.00</td>
</tr>
<tr>
<td>Rates Applicable to the Line Item</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rate Types</td>
<td>Apply</td>
<td>Cost</td>
</tr>
<tr>
<td>MTDC</td>
<td>✔</td>
<td>$20,240.50</td>
</tr>
<tr>
<td>Research Rate</td>
<td>✔</td>
<td>$5,352.68</td>
</tr>
<tr>
<td>Vacation</td>
<td>✔</td>
<td>$2,118.77</td>
</tr>
</tbody>
</table>

Warning: Your browser software must be set to Allow Pop-ups to view this window.

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

- **Description**: Add or change the description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor announcement.
- **Rate Types / Apply**: Select and deselect the Apply checkboxes as needed.

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

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

If you've made any edits select:

- **Save and Apply to Current Period**
- **Close**

You can make further changes to the entries on the Personnel Budget screen as needed.
E. Navigate to the Equipment Screen

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

1. Select **Add Equipment** to add individual items of equipment to the budget.
   - Select a **Type** from the drop-down menu. *(Locally Maintained GL – Major Equipment Budget Category Listing)*
     - Equipment budget Types include:

     - Enter a **Description**. Descriptions entered in the budget line items WILL print on Grants.gov Detailed budget forms. Current Grants.gov equipment budgeting requires a single line item for each equipment item and a description for each Equipment item.

   - Enter a cost in the **Funds Requested ($)** field – **do not use commas**.

   - Select **Calculate** to see how this item impacts budget totals. *(Coeus will calculate automatically upon Save.)*

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

   If there are no edits select: **Close**

   - Select **Save** to save your entered budget item.
2. Enter Equipment **Line Item Details**

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

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

- **Description**: Change the line item description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.
- **Quantity**: Enter if relevant or required based on the sponsor instructions.
- **Cost**: Change as needed. You will see the updated amount back on the main **Equipment** screen.
- **Cost Sharing**: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your OSP Administrator and comply with Institute guidelines for off-campus project eligibility.
- **Rate Types / Apply**: Select and deselect the **Apply** checkboxes as needed (Note: Equipment is exempt from F&A, thus no calculated amounts are available to view.)
The following calculated costs can be viewed on the Line Item Details window:

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

If you’ve made any edits, select:

- Save and Apply to Current Period
- Save and Apply to Current and Later Periods, as relevant to your proposal

If there are no edits select: Close

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

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

1. Select Add Travel to add all of the travel costs to be included in the budget.
   - Select a Type from the drop-down menu. (Locally Maintained GL – Travel Budget Category Listing)
     - Travel – Foreign Expenses;
     - Travel – Professional Development; and
     - Travel Expenses (aka Domestic Travel).
   - Enter a Description. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.
   - Enter a cost in the Funds Requested ($) field – do not use commas.
   - Select Calculate to see how this item impacts budget totals. (Coeus will calculate automatically upon Save.)
   - Select Remove to delete the entry.
   - Select Save to save your entered budget item.

Results after entry:
2. Enter Travel **Line Item Details**

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

<table>
<thead>
<tr>
<th>Line Item Details</th>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description: Domestic meeting, PI attendance required.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date: 01/01/2009</td>
<td>End Date: 12/31/2009</td>
<td>Quantity: 0</td>
<td></td>
</tr>
<tr>
<td>Cost: 1,850.00</td>
<td>Cost Sharing: $0.00</td>
<td>Underrecovery: $0.00</td>
<td></td>
</tr>
<tr>
<td>Apply Inflation: On Campus:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- **Description**: Change the line item description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.
- **Quantity**: Enter if relevant or required based on sponsor instructions.
- **Cost**: Change as needed. You will see the updated amount back on the main **Travel** screen.
- **Cost Sharing**: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your OSP Administrator and comply with Institute guidelines for off-campus project eligibility.
- **Rate Types / Apply**: Select and deselect the **Apply** checkboxes as needed

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

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

If you've made any edits, select:

- **Save and Apply to Current Period**
- **Save and Apply to Current and Later Periods**, as relevant to your proposal

If there are no edits select: **Close**

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

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

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

**Period 1**

<table>
<thead>
<tr>
<th>Period Totals</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Cost</td>
<td>$279,567.66</td>
<td>Indirect Cost</td>
<td>$185,006.00</td>
</tr>
<tr>
<td>Under Recovery</td>
<td>$0.00</td>
<td>Cost Share</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Cost</td>
<td>$464,573.66</td>
<td>Period</td>
<td>01/01/2009 - 12/31/2009</td>
</tr>
</tbody>
</table>

**Budget Participant / Trainee**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Qty</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant/Trainee</td>
<td>0</td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

*Add Participant/Trainee | Calculate*

**Results after entry:**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Qty</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stipends - Not MTDC</td>
<td>10 Trainees, 2 months each</td>
<td>10</td>
<td>$40,000.00</td>
</tr>
</tbody>
</table>

*Add Participant/Trainee | Calculate*
2. Enter Participant/Trainee **Line Item Details**

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

<table>
<thead>
<tr>
<th>Line Item Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save and Apply to Current Period</strong></td>
</tr>
<tr>
<td><strong>Description:</strong></td>
</tr>
<tr>
<td><strong>Start Date:</strong></td>
</tr>
<tr>
<td><strong>Cost:</strong></td>
</tr>
<tr>
<td><strong>Apply Inflation:</strong></td>
</tr>
</tbody>
</table>

**Rates Applicable to the Line Item**

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Calculated Amounts are not available</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you've made any edits, select:
- **Save and Apply to Current Period**
- **Save and Apply to Current and Later Periods**, as relevant to your proposal

If there are no edits select: **Close**

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

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

- **Description**: Change the line item description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.
- **Quantity**: Enter if relevant or required based on sponsor instructions.
- **Cost**: Change as needed. You will see the changes on the main **Participant/Trainee** screen.
- **Cost Sharing**: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your OSP Administrator and comply with Institute guidelines for off-campus project eligibility.
- **Rate Types / Apply**: Select and deselect the **Apply** checkboxes as needed. (Note: Participant/Trainee expenses are exempt from F&A, thus no calculated amounts are available to view.)

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

- **Underrecovery**
- **Rates applicable to the Line item**: Cost and Cost Sharing amounts. (Participant/Trainee expenses are exempt from F&A)
H. Navigate to the Other Direct Costs screen

Enter Costs Line Items in the Budget

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

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

- Select a Type from the drop-down menu. (Locally Maintained GLs—please review)

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

- Enter a Description. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.

- Enter a cost in the Funds Requested ($) field – do not use commas.

- Select Calculate to see how this item impacts budget totals. (Coeus will calculate automatically upon Save.)

- Select Remove to see how this item impacts budget totals. (Coeus will calculate automatically upon Save.)

- Select Save to save the budget entry.

Results after entries:
b. Enter Direct Cost Line Item Details

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

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

- **Description**: Change the line item description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.
- **Quantity**: Enter if relevant or required based on sponsor instructions.
- **Cost**: Change as needed. You will see the changes on the main Other Direct Costs screen.
- **Cost Sharing**: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the Proposal Rates screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your OSP Administrator and comply with Institute guidelines for off-campus project eligibility.
- **Rate Types / Apply**: Select and deselect the **Apply** checkboxes as needed.

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

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

If you’ve made any edits, select:

- **Save and Apply to Current Period**
- **Save and Apply to Current and Later Periods**, as relevant to your proposal

If there are no edits select: **Close**

You can add more items and make further changes to the entries on the Other Direct Costs screen as needed.
2. Enter special Other Direct Costs: Subaward/Subcontracts

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

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

Special NIH Subcontract Instructions for Modular submissions:

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

(Review locally maintained GL/Budget Types)

- Subcontracts – Subject to MIT F&A (for the first 25K) (Direct Costs)
- Subcontracts – Not Subject to MIT F&A (Direct Costs)
- Subcontractor’s F&A – Subject to MIT F&A (Indirect Costs)
- Subcontractor’s F&A – No MIT F&A (Indirect Costs)

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

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

<table>
<thead>
<tr>
<th>Period 1:</th>
<th>First 25K of subawardee direct costs</th>
<th>$25,000.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcontracts - Subject to MIT F&amp;A</td>
<td>Remaining subawardee direct costs</td>
<td>$50,000.00</td>
</tr>
<tr>
<td>Subcontracts - No MIT F&amp;A</td>
<td>Subawardee F&amp;A costs</td>
<td>$48,750.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Period 2:</th>
<th>Period 2 Subawardee direct costs</th>
<th>$75,000.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcontracts - No MIT F&amp;A</td>
<td>Subawardee F&amp;A costs</td>
<td>$48,750.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Period 3:</th>
<th>Period 3 subawardee direct costs</th>
<th>$75,000.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcontracts - No MIT F&amp;A</td>
<td>Subawardee F&amp;A costs</td>
<td>$48,750.00</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Period 1:</th>
<th>Ex 2: small sub: less than $25K total Y1</th>
<th>$12,000.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcontracts - Subject to MIT F&amp;A</td>
<td>Sub’s F&amp;A to sync to Modular screen</td>
<td>$7,800.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Period 2:</th>
<th>P2: Funds still less than first 25K</th>
<th>$5,200.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcontracts - Subject to MIT F&amp;A</td>
<td>Subcontractor direct costs &gt;25K</td>
<td>$6,800.00</td>
</tr>
<tr>
<td>Subcontracts - No MIT F&amp;A</td>
<td>Sub F&amp;A to sync to Modular screen</td>
<td>$7,800.00</td>
</tr>
</tbody>
</table>
3. Other Budgeting Features

a. Cost Sharing

*Please review the appropriateness and administrative policy of cost sharing with your OSP Office.*

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

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

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

<table>
<thead>
<tr>
<th>Description:</th>
<th>Big Widget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date:</td>
<td>01/01/2009</td>
</tr>
<tr>
<td>End Date:</td>
<td>12/31/2009</td>
</tr>
<tr>
<td>Quantity:</td>
<td>0</td>
</tr>
<tr>
<td>Cost:</td>
<td>$7,500.00</td>
</tr>
<tr>
<td>Cost Sharing:</td>
<td>$7,500.00</td>
</tr>
<tr>
<td>Underrecovery:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Apply Inflation:</td>
<td>✓</td>
</tr>
<tr>
<td>On Campus:</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Result after entry:**

**Period 1**

**Direct Cost:** $319,567.88  
**Indirect Cost:** $30,743.00  
**Total Cost:** $350,310.88  
**Under Recovery:** $1,253.00  
**Total Equipment:** $7,500.00

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

Please review the appropriateness and administrative policy of underrecovery with your OSP Office.

If underrecovery should be applied to your ENTIRE project budget, not just a specific line item, you should adjust the appropriate Rate(s) applied in the Proposal Rates screen and/or the Overhead Rate Type and Underrecovery Rate Type on the Budget Summary screen.

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

- Select Edit to open that item’s Line Item Details window
- Deselect the appropriate Rate Types - Apply checkbox from the Rates Applicable to the Line Item, in the bottom section of the Line Items Detail window.
- Click Save and Apply to Current Period or Save and Apply to Current and Later Periods, as relevant to your proposal, before closing this window.

The amount of the underrecovery will also be updated in the Budget Totals section of the Budget Summary screen.

### Rates Applicable to the Line Item

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td></td>
<td>$1,258.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Result of unchecked Apply MTDC Rate:**

<table>
<thead>
<tr>
<th>Line Item Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description:</strong></td>
</tr>
<tr>
<td><strong>Start Date:</strong></td>
</tr>
<tr>
<td><strong>End Date:</strong></td>
</tr>
<tr>
<td><strong>Cost:</strong></td>
</tr>
<tr>
<td><strong>Cost Sharing:</strong></td>
</tr>
<tr>
<td><strong>Underrecovery:</strong></td>
</tr>
<tr>
<td><strong>Apply Inflation:</strong></td>
</tr>
<tr>
<td><strong>On Campus:</strong></td>
</tr>
</tbody>
</table>

### Rates Applicable to the Line Item

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Note:** Underrecovery may be required to be distributed prior to marking a budget Complete. Instructions for distribution are in a later section of this guide.
I. Generate All Periods from your Detailed Period 1 Budget

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

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

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

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

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

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

Prior to using Generate All Periods, follow the steps below to review your budget entries.
1. Preview All Budget Expenses

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

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

### Coeus Proposal Development - Budget Summary

<table>
<thead>
<tr>
<th>Proposal Number:</th>
<th>00003562</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Title:</td>
<td>Sample for screen shots</td>
</tr>
<tr>
<td>Investigator Name:</td>
<td>Hanlon, Rosemary</td>
</tr>
<tr>
<td>Period:</td>
<td>01 Jan 2009 - 31 Dec 2009</td>
</tr>
</tbody>
</table>

#### Personal Category

**Personnel**

- Hanlon, Rosemary Administrative Staff - On
- Computer Programmer Research Staff - On
- Seuss, Doctor Research Staff - On
- TBA - Project Coordinator Program Manager

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>FTE Rate</th>
<th>Vac Rate</th>
<th>Percentage Charged/Effort</th>
<th>Fringe Benefits</th>
<th>Salaries &amp; Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/01/09</td>
<td>12/31/09</td>
<td>24.00%</td>
<td>9.50%</td>
<td>25.0 / 25.0</td>
<td>$7,603</td>
<td>$23,292</td>
</tr>
<tr>
<td>02/01/09</td>
<td>12/31/09</td>
<td>24.00%</td>
<td>9.50%</td>
<td>50.0 / 50.0</td>
<td>$12,283</td>
<td>$36,667</td>
</tr>
<tr>
<td>01/15/09</td>
<td>12/31/09</td>
<td>24.00%</td>
<td>5.00%</td>
<td>25.0 / 25.0</td>
<td>$7,471</td>
<td>$22,333</td>
</tr>
<tr>
<td>02/01/09</td>
<td>12/31/09</td>
<td>24.00%</td>
<td>9.50%</td>
<td>100.0 / 100.0</td>
<td>$9,212</td>
<td>$27,500</td>
</tr>
</tbody>
</table>

**Total Other Professionals** $38,770 $105,751

#### Graduate Students

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>FTE Rate</th>
<th>Vac Rate</th>
<th>Percentage Charged/Effort</th>
<th>Fringe Benefits</th>
<th>Salaries &amp; Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/01/09</td>
<td>12/31/09</td>
<td>100.0 / 10.0</td>
<td>0%</td>
<td>$1,013</td>
<td>$1,013</td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL GRADUATE STUDENTS** $0 $1,013

#### Equipment

- Equipment - Not MTDC - Big Widget

**Total Equipment** $7,500

#### Materials

- Materials and Services - minorequipment-server memory upgrade

**Total Materials** $3,000

#### Publication Costs/Documentation/Dissemination

- Printing - in-house publication costs- supplies

**Total Publication Costs/Documentation/Dissemination** $2,500

#### Trainee/Participant Costs - Stipends

- Stipends - Not MTDC - 10 Trainees, 2 months each

**Total Stipends** $40,000

**Stipends** $40,000

### Calculation Methodology

The full F&A (Indirect) Cost Rate is applied to the total direct costs, less the following exclusions:

- Equipment - Not MTDC - Big Widget $7,500
- Stipends - Not MTDC - 10 Trainees, 2 months each $40,000
- Travel Expenses - Domestic Meeting-R attendance required $1,650

**Total exclusions from F&A base** $49,350

The Allocated Administrative Support and Allocated Lab Expense Rates are applied to the total direct costs, less the following exclusions:

**Total exclusions from Allocated Expense base** $0

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

You can print and/or save this PDF file for distribution by email or hardcopy to proposal participants for their review.
2: Navigate to Generate all Periods

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

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

b. A confirmation screen will display upon completion.

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

3: Adjust budget by period

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

For example:

- Add and remove Personnel
- Adjust Personnel effort, or period of performance
- Add or remove expense line items
- Adjust costs generated on line items
J. Navigate to the Budget Summary Screen

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

Be sure to review the Overhead Rate Type and Underrecovery Rate Type applied for this proposal. If you feel you need to change the rate types, please confirm this first with your OSP Office for appropriateness.

Things you can modify on the Budget Summary Screen:

- Change the Budget Status drop-down to Complete once you have completed the budget (this can also be done on the Budget Versions screen). Note: The budget version must be marked Final before it can be marked Complete.

- Select the Final checkbox to transmit this budget to the sponsor (this can also be done on the Budget Versions screen).

- Select the Modular Budget checkbox if this budget will be an NIH Modular budget.

- Select the On/Off campus option to override the cost element overhead mapping.
  - Select “Off” to have Coeus apply the maintained Off Campus Overhead rates to all the budgeted cost elements, despite the cost element description of On Campus.
  - Select “On” to have Coeus apply the maintained On Campus Overhead rates to all budgeted cost elements, despite the cost element description of Off Campus.
  - Select “Default” to have Coeus apply the maintained OH rate for that cost element. Default allow for the inclusion of both On- and Off-campus rates in the budget.

- Enter Residual Funds (refer to sponsor guidelines for requirement definitions).

- Enter a Total Cost Limit (reference only – this will NOT restrict your CoeusLite budget).

- Enter a Direct Cost Limit (reference only – this will NOT restrict your CoeusLite budget).

- Change the Over Head Rate Type and/or Underrecovery Rate Type.

- Enter text in the Comments field to make notes about this budget.

Once you have completed your changes to this screen, Select Save.
K. Navigate to the Budget Versions Screen

**Budget Versions**

a. Create Alternate Versions of your Budget

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

**Budget Versions**

**Budget Status:** **Incomplete**  **Final Version:**

<table>
<thead>
<tr>
<th>Version</th>
<th>Start Date</th>
<th>End Date</th>
<th>Direct Cost</th>
<th>Indirect Cost</th>
<th>Total Cost</th>
<th>Final</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01/01/2009</td>
<td>12/31/2011</td>
<td>$149,164.40</td>
<td>$100,751.94</td>
<td>$249,916.32</td>
<td>Open</td>
</tr>
</tbody>
</table>

**Add New Version**

**Things you can do on the Budget Versions Screen:**

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

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

**Once you have more than one version of the budget, you will always be brought to this screen when you navigate to Budget. You must click **Open** to the right of the budget version you want to access.**
Currently Modular budgets are a submission option for certain NIH opportunities ONLY. Review the specific funding opportunity to determine if Modular budgeting is an option or a requirement, as well as the module limits per budget period.

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

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

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

**OR**

2. Create a detailed budget outside of CoeusLite and manually create a Modular budget.
   - If your institution allows this, create an external supporting budget in the program of your choice, and upload it on the **Upload Attachments** screen in the **Upload Institutional Attachments** tab to assist reviewers during internal review.
   - To then create the Modular budget; manually enter the required details in the **Modular Budget** screen in order to populate the mandatory forms.

    You *must* select the **Modular Budget** option on the **Budget Summary** screen in order for Coeus to populate your Modular budget information on the Grants.gov PHS Modular Budget Form.
L. Navigate to Modular Budget Screen:

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

   a. Select Modular Budget on the Budget menu

   b. Select Sync with Detailed Budget

   c. Select OK when the confirmation window opens.

      • Review the data defaulted in each of the Period tabs.

         o All the white-background fields are editable: review each period and adjust the amounts, if needed.

         o It is especially important to review in the Direct Cost less Consortium F&A field to reflect the appropriate number of $25,000 modules

         o Review each Rate Number row, especially if Off campus rates are utilized in the budget, or if multiple Fiscal Year Rates are present for a budget period crossing Fiscal Years with varying maintained F&A rates.

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

For Period 1:

a. **Select Modular Budget**.

b. **Enter** the *Direct Cost less Consortium F&A* amount.

c. **Enter** *Consortium F&A* costs (if any).

d. **Select Add Indirect Cost** to create an entry line for the Indirect Cost data.

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

  ![Add Indirect Cost](index.png)

:e. **Select Save**.

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

g. Review the Cumulative screen to confirm totals.
M. Navigate to Cost Sharing Distribution  *Local business practices should be maintained in this section.*

**Cost Sharing Distribution**

- **Select** *Cost Sharing Distribution* from the left Navigation bar.
  
  If Cost Sharing commitments have been generated in the budget periods, the amounts will be displayed in the *Total Cost Sharing Amount* panel.

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

- **Enter** the Source Account Code for each Fiscal Year Commitment.

  - **If needed**, use *Add Cost Sharing Distribution* to generate a new entry line.
    - **Enter** a Fiscal Year, Percent (optional), Amount, and Source Account Code.

- **Select** *Remove* to delete an unnecessary entry line.

- **Select** *Save*.

<table>
<thead>
<tr>
<th>Budget Totals</th>
<th>Direct Cost:</th>
<th>$749,892.40</th>
<th>Indirect Cost:</th>
<th>$377,097.07</th>
<th>Total Cost:</th>
<th>$1,126,989.47</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under Recovery:</td>
<td>$3,888.36</td>
<td>Cost Share:</td>
<td>$15,000.00</td>
<td>Period:</td>
<td>01/01/2009 - 12/31/2011</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Period</th>
<th>Total Cost Sharing Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$7,500.00</td>
</tr>
<tr>
<td>2</td>
<td>$7,500.00</td>
</tr>
<tr>
<td>3</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Cost Sharing Distribution List:**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Percent</th>
<th>Amount</th>
<th>Source Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

As maintained with a single Source Account entered for each fiscal year.

<table>
<thead>
<tr>
<th>Budget Totals</th>
<th>Direct Cost:</th>
<th>$749,892.40</th>
<th>Indirect Cost:</th>
<th>$377,097.07</th>
<th>Total Cost:</th>
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<tbody>
<tr>
<td>Under Recovery:</td>
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<td>01/01/2009 - 12/31/2011</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Period</th>
<th>Total Cost Sharing Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$7,500.00</td>
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<td>2</td>
<td>$7,500.00</td>
</tr>
<tr>
<td>3</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Cost Sharing Distribution List:**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Percent</th>
<th>Amount</th>
<th>Source Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td></td>
<td>$7,500.00</td>
<td>00000004</td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td>$7,500.00</td>
<td>00000004</td>
</tr>
</tbody>
</table>

If you have not incurred cost sharing in your budget, you will receive a notice instead of the distribution screen.

**There is no Cost Sharing for this version of the Budget**
N. Navigate to Under Recovery Distribution

Local business practices should be maintained in this section.

- Select Under Recovery Distribution from the left Navigation bar.
- If Under Recovery commitments have been generated in the budget periods, the amounts will be displayed in the Under Recovery Amount panel.
- Use the Under Recovery Distribution List panel to identify the source(s) of funding support for the commitment. The initial list will be generated with a line for each fiscal year where a commitment exists, but additional lines can be added to have multiple sources for each fiscal year.
- Enter the Rates for each Fiscal Year, Select On or Off Campus, Amount, and Source Account Code.
  - If there are no Off Campus expenses, remove those lines from the panel.
  - If needed, use Add Under Recovery Distribution to generate a new entry line.
  - Enter a Rate, Fiscal Year, On/Off Campus, Amount, and Source Account Code.
- Use Remove to delete an unnecessary entry line.
- Select Save to save the changes.

If you did not incur under-recovery in your budget, you will receive a notice instead of the distribution screen.
**O. Navigate to Project Income**

*Project Income*

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

To enter Project Income in your budget:

1. **Select Project Income**

<table>
<thead>
<tr>
<th>Project Income Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Income Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
</tr>
</tbody>
</table>

   **Add Project Income**

2. **Select Add Project Income**

<table>
<thead>
<tr>
<th>Project Income Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Income Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
</tr>
</tbody>
</table>

   **Add Project Income**

   **Save**

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

4. **Enter** the Income funds.

5. **Enter** a Description.

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

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

8. **Select Save**

   **Save**

Repeat for each period with Project Income to report.
P. Perform Budget Validations


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

Budget Validation Errors:

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

Budget Validation Warnings:

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

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

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

Budget Summary

Navigate to the Budget Summary screen.

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

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

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

Select Complete from the Budget Status drop-down menu.

Select Save.

Navigate to Return to Proposal.
13. Navigate to Upload Attachments

**Upload Attachments**

- **Select Upload Attachments** screen.

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

<table>
<thead>
<tr>
<th>Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Upload Proposal Attachments</strong></td>
<td>These documents or files are required as defined by the sponsor opportunity instructions and their general submission guidelines. A base list of types will always be presented. To display the types required for Grants.gov submissions, an opportunity must already have been selected in General Info for this proposal.</td>
</tr>
<tr>
<td><strong>Upload Personnel Attachments</strong></td>
<td>These are person-specific files (biosketch, current &amp; pending, etc.)</td>
</tr>
<tr>
<td><strong>Upload Institutional Attachments</strong></td>
<td>Defined locally by your institution’s Coeus Administrator.</td>
</tr>
</tbody>
</table>

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

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

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

List of Proposal Attachments

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

Repeat for all required Proposal Narrative Attachment Types.

Refer to your sponsor opportunity or general submission guidelines for required uploads.
Refresh Proposal Attachment instructions:

- Navigate to the Upload Narratives screen.
- Click on the Tab where the narrative was initially maintained.
- Locate the narrative to be updated.
- Click on the narrative FILE NAME – first cell in table – NOT the View button.
- At the top of the screen, The Upload New File button appears (where the Browse button appears in Modify mode).
- Select Upload New File,
- Browse for your replacement file; select and save it to return to the Add Document screen.
- Save.

NOTE: If a Narrative is refreshed while the proposal is in Approval In Progress status; an email message will be sent to all proposal approvers that a file has been updated (the module number will be identified).
Upload Personnel Attachment instructions:

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

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

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

Repeat for all required Personnel and Personnel Narrative Attachment Types.

Refer to your sponsor opportunity or general submission guidelines for required uploads.
Locally Maintained narratives – Coeus Administrator maintenance required.

Upload Institutional Attachment instructions:

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

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

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

Repeat for all required Institutional Attachments Types.

Refer to your institutional policy or submission preparation instructions for required uploads.
14. Navigate to Institutional Validations

**Locally Maintained Rules – Validate**

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

Several categories of validations may be processed on your proposal:

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

- Answering all the Yes/No Questions
- Certifying all the Investigators
- Completing Mandatory Questionnaires
- Marking a budget Final and Complete
- Any locally-defined business rules applicable to your institute’s rules and regulations.

**Coeus Budget Validations**: Your local Coeus Administrator may have created Budget-specific business rules. These budget validation rules will be processed during this Validation.

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

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

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

15. Navigate to Submit for Approval

**Submit for Approval**

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

**Before you try to submit:**

- Finalize your proposal:
  - Mark your budget as **Final** and **Complete** on the **Budget Summary** screen
  - Navigate to the **Grants.gov** screen and select **Validate**;
    - Respond to any errors displayed – make the necessary corrections.
    - Return to the **Grants.gov** screen and **Validate** again. Repeat until the **Validations Successful** message is displayed.
  - Make sure that you Certified all the Investigators.
16. Navigate to Print

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

- **Sponsor Form Packages** are for paper submittals
  - Select **Show** or **Hide** to expand the available forms
  - Select **All** to check all the forms available in the displayed group; **None** to deselect; or select individual forms.

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

Copy Proposal

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

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

You must have the Aggregator Role in order to copy all Narratives and Budget.

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

**Select Copy** from the left navigation bar

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

When the next screen appears:

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

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

**Select** to **copy Narratives** (if appropriate – most of these files will need to be replaced for all but Change/Corrected applications).

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

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

**Update your Copied Proposal elements!**

1. Adjust the start and end dates to meet your new submission requirements, if necessary.
2. Link to the Grants.gov opportunity and forms (the CFDA and/or Funding Opportunity Number info will copy, but you still need to complete the link.
3. Verify that any copied narrative types are still appropriate.
4. Adjust the budget period boundaries to reflect the new dates.
5. Review the rate tables, syncing the rates if necessary.

**When Copied Proposal Narratives require special attention:**

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

Navigate to Email
- Select Add Employee to search the Coeus Person table HR data.
- Select Add Non Employee to search the Rolodex.
- Select Add Role to select a pre-defined approver on your Routing Map.

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

Enter a subject in the Subject line field provided.
Enter a message in the text box provided.

Select Send.

Coeus will send an email notification to the recipient(s).
19. Navigate to Add New Rolodex Entry

Add New Rolodex Entry

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

Navigate to Add New Rolodex Entry

Enter the required fields

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

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

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

Select Save

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

You must have authorization from your Coeus Administrator to create Rolodex entries. Either contact your administrator to grant you the Rolodex Maintainer role, or ask your local Coeus Help-desk to create the Rolodex entry for you.
20. Navigate to Show Approval Routing (available after submitted for approval)

**Approval Routing**

**Locate** the submitted Coeus proposal in My Proposals

**Select Approval Routing**

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

**Select Show** to expand the approval box

**Select Hide** to minimize the approval box

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

**Select Hide Legend** to hide the panel of legend icons.
21. Check on the Grants.Gov Submission Details status:

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

**Items on this screen:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received Date:</td>
<td>This is timestamp for your submittal being processed into Grants.gov.</td>
</tr>
<tr>
<td>Last Modified Date:</td>
<td>This displays the most recent refresh timestamp. Coeus refreshes submittals on an ongoing basis until the submission process is complete. Users can refresh manually.</td>
</tr>
<tr>
<td>Grants Tracking Id:</td>
<td>The Grants.gov tracking number</td>
</tr>
<tr>
<td>Agency Tracking Id:</td>
<td>Agency-assigned tracking number – not all agencies provide data back via Grants.gov.</td>
</tr>
<tr>
<td>Notes:</td>
<td>Information provided by Grants.gov.</td>
</tr>
<tr>
<td>Attachments:</td>
<td>List of all uploaded documents submitted.</td>
</tr>
</tbody>
</table>
Appendix A: Coeus Premium vs. CoeusLite…Version 4.4

“You want to upgrade to Premium Proposal Development when…”

Your Grants.gov proposal includes a Subaward that requires transmission of the detailed Subaward budget file to Grants.gov

- Coeus Premium allows for the upload and submission of detailed Subaward budgets via Grants.gov.

Your proposal requires budgeting of multiple sub-projects and you want Coeus to link the proposals and build a hierarchy.

- A proposal hierarchy can be helpful if you need to build separate budgets to submit as one:
  - Co-investigators in other departments with Lab Allocations
  - Separate budgets and/or tasks by child accounts
  - Separate a budget with a specialized F&A rate

You can create and complete your individual proposals in either Lite or Premium but creating the hierarchy but **linking and unlinking** the child proposals to the parent proposal **must** be done in Premium. Once separate proposals are created, one of the proposals can then create the Parent proposal, and as many child proposals can be linked as are needed.

- While a proposal is linked in a hierarchy, it can only be **viewed** in Lite. Unlink the proposal from the hierarchy to continue modifications in Lite.
- The hierarchy parent proposal can only be modified in Premium.

You know you’ll have on a complex budget and need all the cool Coeus budgeting tools:

- Sync your period costs to a *total period cost limit*
- Sync your period costs to a *direct cost limit.*
- Display customizable views of your Coeus budget; e.g. display a cost-sharing column for each line item
- Change the budget category of a line item for this proposal
  - Such as publishing a Post Doc to the Senior Personnel section of the RR Budget
- You prefer to budget by cost element (GL# not by category or description)
- You want to see all expense line items in one screen while budgeting
- You have predefined, exact personnel cost totals that must appear by category, not by person.

You want to create your Narratives Types, but not to upload files until later:

- Premium allows you to Add Narrative Type “placeholder” without uploading a file; files can be uploaded later.
- Premium allows you to rearrange order of the Narrative Types
- Premium lets you edit the comments and status of the Narrative Type after it has been created.

You want to re-order your Proposal Personnel to change the order they are listed in the RR Key Person (Expanded) form.

- Premium allows you to arrange the personnel order without deleting entries.

You want to see the Routing Map for your proposal before you Submit for Approval:

- Premium allows you to preview the approver map as you build your proposal

You need to maintain Proposal Person Citizenship details:

- Some sponsor forms require citizenship details, which can only be maintained in the Premium Proposal Person Details screen. (NIH Fellowship & Career Development forms)

You need to maintain Proposal Person details:

- You need to modify the Person-Editable fields that have been defined by your institution.
- You want to maintain the Salary Anniversary Date for your proposal budget persons for all proposals.
- You want to maintain the NIH eCommons login ID as the default id for your investigators.
- You want to upload Biographies or Current & Pending documents to the Person “central repository” so they can be downloaded automatically to any proposal.

You want to enter a Science Code (for institutional reporting/tracking/keywords):

- Premium allows you to search for and add a maintained Science code on the Science Code tab. Once entered in Premium, the code will not be displayed in the Lite proposal, but will still be in effect and modifiable in the Premium proposal until submitted for approval.

You want to generate a list of investigator’s Current Awards and Pending Awards from your proposal:

- Premium has a tool that queries the Award module for current awards and the Institute Proposal module for pending proposals. These reports can be downloaded as Excel files and used to prepare a Current & Pending Support document.
Appendix B:

Summary of Significant changes between Coeus Lite User Guides 4.3.2 (1 Dec 08) vs. 4.4.1 (March 2010)

Create Proposal from Grants.gov Opportunity Search (COEUSQA-1987)
Questionnaire (COEUSQA-1616 & others)
Anniversary Date Salary Inflation (COEUSQA-416)
Budget Periods: Number of Months column and fields defined (COEUSQA-1590)
Tip: Save & Apply to Current and Later Periods should not be used to modify existing budget personnel entries.
Tip: modified Cost Sharing tip to “may be required”: parameter setting defines if distribution is mandatory.
Tip: modified Underrecovery tip to “may be required”: parameter setting defines if distribution is mandatory.
Business Rule Validations for Proposal Budgets (COEUSQA-1573)
Many screen-shots replaced with 4.4 screens.
“You want to upgrade to Premium when…..”

__Anniversary Date Salary Calculation__ feature debuted in Coeus 4.3.2; COEUSQA-416, a Johns Hopkins University infrastructure funds project. To enable the Anniversary Date column in the Budget Personnel table, maintain the parameter ENABLE_SALARY_INFLATION_ANNIV_DATE to 1. If the parameter is 0, the column will not display.
To use: Enter the Anniversary Date (if enabled). If your institution uses individual anniversary dates for salary inflation, the Anniv Date column should be maintained with a date for each Budget Person. If your institution pre-populates from HR data feed to Coeus Person data, the date may pre-populate. Otherwise, enter the date manually. Coeus will still use the rates table for the relevant inflation percentage (by personnel category for the selected salary type/cost element), but the __individual anniversary dates__ will be used in the calculation instead of the __salary category__ dates displayed in the table.