April 1, 2013

Summary of recent changes to CoeusLite

Release 4.5.1 P1

A Web-based application for preparing, routing, and submitting proposals.

Find CoeusLite at:

CoeusLite (Production) Client: https://prcoeus.johnshopkins.edu/coeus
CoeusLite (Training) Client: https://mrtrcoeus.johnshopkins.edu/coeus
# Changes to CoeusLite in Release 4.5.1

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Introduction

The latest Release of Coes brings many enhancements to CoeusLite. This short guide describes the major improvements. And, while all major proposal preparation tasks can now be completed in CoeusLite there continue to be certain tasks that must be completed in Premium. These shortcomings are described in Section 9.

1) Proposal Summary Window

i) Access from Main Navigation Panel

   ii) These are the screens from within Proposal Summary window. They are enhanced versions of the window previously available to Approvers.

(1) Section: Header
(2) Section: ‘List of Investigators/Key Persons’

(3) Section: ‘Budget Summary’ & print ‘Budget Reports’

(4) Section: Proposal Print forms

2) Budgeting

a) Automatic Subaward budgeting with upload of RR Budget Form.

CoeusLite and Premium now: 1) automatically extract Subawardee’s Direct and Indirect costs from RR Budget Form, 2) allocate those costs to the correct JHU Cost Elements, and 3) calculate the JHU Indirect Cost.
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(1) Open: budget in edit mode.

(2) Complete: ‘Budget Set Up’.

(3) Edit: All periods must be present in the budget. If you are uploading the RR Subaward Budget first, simply add a single Cost Element to Period 1 as a placeholder, no dollars need to be budgeted. Generate All Periods. Then, after completing the subaward steps below, merely delete this initial cost element placeholder from each Budget Period.

(4) Open: ‘Sub Award Budget’ window:
(5) Select: ‘Add Subaward’.
(6) Enter: Institution’s Name.
(7) Browse/Upload: RR Budget Form.
(8) Save.

(9) View: full Upload history.

(10) View: budget data extracted from the RR Budget form.

(11) Coeus will automatically allocate Subawardee’s budget to correct JHU cost elements.
And, Coeus will calculate the JHU Indirect Cost.

Should your proposal require a different Subaward Cost Element structure, perhaps one that does not permit a JHU F&A charge, email coeus-help@jhu.edu for guidance.
b) Budget Summary box is editable, when no detailed budget is built in Coeus.
c) **Base Salary by Period WILL NOT automatically display on RR Budget form.**

The System-to-System RR Budget form will NOT display Period Base Salary amounts UNLESS you select one of two buttons: 'Base Salary by Period' or 'Calculate All Base Sal'. Once selected you will have the option of using the Coeus method of calculating Period Base Salary(*), or enter some other desired amounts.

i) Enter: Base Salary.

ii) Enter: Anniversary Date(*).

iii) Select: Base Salary by Period.

iv) Or, Select: Calculate All Base Sal.

v) Select: Calculate

vi) Or, if you wish to enter some other Base Salary, do so now.

vi) Select Save.

(*)Caution: this functionality ONLY inflates the Base Salary on the first date of each Budget Period, except the First Period. That is, the Base Salary calculated always assumes the Anniversary Date is the Budget Period Start date and does not inflate the Base Salary in the First Period. Actual Period Starting salary is NOT displayed, unless the Budget Person's Anniversary Date is the same as the Project Start Date.
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d) Cost Element/Description window is now wider to display full CE title.

3) Science Code added to CoeusLite

(1) Open: Science Code window.
(2) Select: Add Science Code.
(3) Select: Search
(4) Enter: an asterisk, *.
(5) Select Search.
(6) Select from list of All Codes the desired Science Code.
4) Person Certifications

Summary

i) Preparers should contact their respective Offices of Research Administration to ascertain their School policy about Certification.

ii) Enhancements to Certification include: 1) actual Certification is only available in CoeusLite; Premium provides a link to Lite; 2) display of a time/date stamp of person actually completing the questions; 3) ability for preparer to send an email notification to any/all (JHU) Investigators with a link allowing those Investigators to complete their own Certification; 4) ability for Investigators(*) to following the email link to CoeusLite and complete their Certification, thus marking that Certification as completed by the Investigator.

iii) (*) While Coeus will send email notifications to nonJHU, Rolodex, persons – if their Rolodex entry has an email address, those persons will not have the authorization to launch CoeusLite from the email notification link sent to them.

a) How the proposal Preparer Certifies

(1) Within the Proposal, in the Investigator/Key Persons window, Select button ‘Certify’.
(2) This will take you to the Proposal Summary >Proposal Person Certification Questions window.

(3) Select, click on, the Proposal Person you wish to Certify.
(4) Answer the questions and Save. The User Time/date stamp is updated and the Save button becomes the Print button(*).

(*) Currently, CoeusLite has a bug which causes an extreme delay in the printing of the Certification form. It may take up to 10 minutes. Press Print one time. The PDF will eventually appear on your screen.
b) How to Notify Investigators to complete their own Certification

(1) Within the Proposal, in the Investigator/Key Persons window, select button 'Send Notification'.

(2) In the Pop-Up Window select (JHU) Investigators to receive the automatic email notification. Do not select Rolodex Persons.
c) How a JHU Investigator can complete their Certification

(1) Investigators, as JHU employees, will instantly receive an email notice list this:

![Email](https://example.com/email.png)

Please certify the proposal by clicking on the following link Pi:

- Lead Unit:
- Proposal Number: 00042351
- Sponsor:
- Deadline Date:
- Title:
- Sponsor Announcement:

You have been named as investigator for the above referenced project. Please use the link given below for the project details.

https://coeus.jhu.edu/coeus/proposalPersonsCertify.do?proposalNo=00042351&personId=00018348

PLEASE NOTE: This email is for notification purposes only. Please do not reply to this email for any purpose.

(2) Investigator should:

(a) Follow the Link: "...given below for the project details."
(b) Logon to CoeusLite: Enter their JHED credentials.

![Login](https://example.com/login.png)

(c) Complete the questions and SAVE;

![Certification](https://example.com/certification.png)

(3) The Certification now contains a User ID and Date/Time Stamp.

![Answered](https://example.com/answered.png)
5) Yes/No Questions replaced by several ‘smart’ Questionnaires

(1) 'YNQ' remains visible, but viewing YNQ answers in older proposals must be done using the proposal summary form – now called 'ORIS Proposal Summary Form'.

(2) Questions for Grants.gov must always be completed – but, if Proposal is not to be System to System submission only one question must be answered.

(3) Research Compliance Questions must always be completed – but, now only questions pertinent you your proposal will be asked.
6) Recall a Proposal after initiating routing for approval

(1) After submission Preparer will find Recall button on Proposal Summary window.

(2) Selecting Recall, above, opens comments window and second Recall button.

(3) Status changes to ‘Recall’, which is a fully editable Status similar to In Progress or Rejected.
7) What happened to ‘eRA Commons’ field?

(1) The Field has been renamed ‘Agency Credentials’.
(2) It remains in the same location: Investigators/Key Persons Window>On Proposal Person line>Select Details>“Agency Credentials” field.
8) Things to do in Premium...cannot be done in Lite

a) Budgeting
   i) Proposal Hierarchy, create or link to Parent - Your proposal requires more than one F&A Rate (IDC Rate).
      (1) Example: K99/R01 Training Grant.
   ii) Sync Budget by Period - You know you'll have a complex budget and need these tools:
       (1) Sync your period costs to a period cost limit
       (2) Sync your period costs to a direct cost limit.
       (3) Display customizable views of your Coeus budget; e.g. display a cost-sharing column for each line item
       (4) You prefer to budget by cost element (not by budget category)
       (5) You want to see all expense line items in one screen while budgeting
       (6) You have predefined, exact personnel cost totals that must appear by category, not by person.
   iii) Complex list of Participant/Trainee expense items:
        (1) Example: NSF REU & REI supplements.
   iv) Do not want to Applying Inflation to a single Budget Line Item/Budget Person:
        (1) Example: Turn off, Uncheck Apply Inflation, for Investigator at the NIH Salary Cap.

b) Proposal Development
   i) Enter Citizenship for a Proposal Person:
      (1) Example: NIH Fellowship & Career Development forms.
   ii) Re-order Proposal Personnel - change the order in which proposal personnel are listed in the RR Key Person (Expanded) form.
   iii) See the Routing Map BEFORE Submit proposal for Approval