

# Coeus Lite Proposal Development User Guide

---

**CoeusLite**

**Coeus Login**

Use of this CoeusLite™ requires a username and password.

**USERNAME** **PASSWORD**

**Login** **Reset**

**COEUS**

MASSACHUSETTS INSTITUTE OF TECHNOLOGY

© 2006, MIT

Coeuslite Version 4.5.1\_P3

Document Date: April 2017




# Table of Contents

---

<b>COEUSLITE HOME PAGE .....</b>	<b>4</b>
<b>MY PROPOSALS NAVIGATION .....</b>	<b>4</b>
<b>PROPOSAL SEARCHES IN COEUSLITE .....</b>	<b>5</b>
<b>CREATE A NEW PROPOSAL.....</b>	<b>5</b>
1. (NEW) PROPOSAL SUMMARY SCREEN .....	8
2. GENERAL INFO SCREEN.....	10
3. ORGANIZATION SCREEN .....	12
4. INVESTIGATORS & KEY PERSONNEL .....	15
5. (NEW) PERSON CERTIFICATION FORM/QUESTIONS .....	22
6. (IGNORE) CREDIT SPLIT .....	27
7. SPECIAL REVIEWS.....	27
8. ABSTRACTS .....	28
9. (NEW)SCIENCE CODE.....	28
10. OTHERS.....	30
11. (ABOLISHED) YNQ: YES NO QUESTIONS .....	30
12. ASSIGN PROPOSAL ROLES.....	31
13. (NEW) QUESTIONNAIRE SECTION .....	31
14. GRANTS.GOV, SYSTEM-TO-SYSTEM (S2S), PROPOSALS.....	32
15. (NEW) USING BUDGETED TBA POSITIONS IN GRANTS.GOV SUBMISSIONS .....	33
16. BUDGET SCREENS .....	34
A. Budget Set up requirements.....	39
B. Add and complete Budget Personnel entries.....	39
C. Adjust Periods (boundaries).....	43
D. Proposal Rates .....	46
E. Personnel Budget .....	49
F. Equipment Screen.....	53
G. Travel screen .....	56
H. Participant/Trainee screen .....	58
I. Other Direct Costs screen .....	60
J. Generate All Periods from your Detailed Period 1 Budget .....	65
K. (new) Subaward Budgeting .....	68
L. Budget Summary Screen .....	71
M. Budget Versions Screen.....	72
N. Modular Budget Screen.....	74
O. Cost Sharing Distribution.....	77
P. Under Recovery Distribution .....	78
Q. Project Income .....	79
R. Perform Budget Validations.....	80
S. Finalize Your Budget.....	81
17. OVERVIEW - UPLOAD ATTACHMENTS .....	82
18. SUBMIT FOR APPROVAL.....	85
19. DELETE PROPOSAL .....	86
20. COPY PROPOSAL.....	86
21. EMAIL: SEND EMAIL NOTIFICATIONS FROM YOUR PROPOSAL .....	87
22. ADD NEW ROLODEX ENTRY .....	88
23. REQUEST NEW SPONSOR .....	88
24. SHOW APPROVAL ROUTING.....	89
25. EXAMINE GRANTS.GOV SUBMISSION DETAILS STATUS .....	91
<b>APPENDIX A: WHAT MUST BE COMPLETED IN COEUS PREMIUM? .....</b>	<b>92</b>
<b>APPENDIX B: TIPS .....</b>	<b>93</b>

APPENDIX C: ACTIVITY TYPES.....94

APPENDIX D: REQUEST A NEW SPONSOR IN SAP ..... 95

	<b>Turn Off Pop-up Blocker!</b> Check the pop-up blocker settings for your web browser so you can be sure to <i>Always Allow Pop-Ups</i> from CoeusLite.
	<div></div> <b>Caution using the Browser Back button!</b> <div><div>1)</div><div>Because the back button is a Browser History button it <b>SHOULD NOT BE USED TO NAVIGATE WITHIN</b> a proposal. Use the Navigation panel.</div></div> <div><div>2)</div><div>However, if you receive an error message you <b>MUST</b> use the browser back button to return to the proposal record. Only click it one time. Multiple clicks will send you down the Browser History to older data entry points, skipping your most recently entered data.</div></div>

## CoeusLite Home page

The screenshot shows the CoeusLite Home page with the following callouts:

- My Proposals**: Open list of your Proposals.
- Logout**: Close CoeusLite
- Current Locks**: Delete, Unlock, your lock proposal database
- Launch Coeus Premium**, **Coeus User Guides**, **Request New Sponsor**, **Help**: Active Links to:
  - >Launch Coeus Premium.
  - >Launch Coeus User Guide website.
  - >Request a New Sponsor from SPSS.
  - >Start a Help email request to Coeus HelpDesk.

## My Proposals Navigation:

- Default view is Proposals with Status of: In Progress, Recalled, Rejected, or Approval In Progress.

The screenshot shows the 'My Proposals' page with the following callouts:

- View all of your proposals**: Points to the 'All Proposals' link.
- View your active proposals**: Points to the 'Proposals In Progress' link.
- Start a new proposal**: Points to the 'Create New Proposal' link.
- Search for a proposal**: Points to the 'Proposal Search' link.
- Lead Unit**: Points to the 'Lead Unit' column header in the table.
- Statuses appearing in this list.**: Points to the status column in the table.
- Click to resort.**: Points to the 'Click to resort.' link in the table.

Proposal Number	Status	Title	Lead Unit	PI	Budget
<a href="#">00029743</a>	<a href="#">In Progress</a>	Network Modeling for Prediction of	<a href="#">17072118</a>	Schultz, Ronald	<a href="#">Budget</a>
<a href="#">00029742</a>	<a href="#">Recalled</a>	Test fri	<a href="#">11556200</a>	Schultz, Ronald	<a href="#">Budget</a>
<a href="#">00029714</a>	<a href="#">Rejected</a>	ste	<a href="#">11556200</a>	Schultz, Ronald	<a href="#">Budget</a>
<a href="#">00029713</a>	<a href="#">Approval In Progress</a>	Phase-	<a href="#">17062520</a>	Schultz, Ronald	<a href="#">Budget</a>
<a href="#">00029712</a>	<a href="#">In Progress</a>	Testing	<a href="#">17062520</a>	Schultz, Ronald	<a href="#">Budget</a>

## Proposal Searches in CoeusLite

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

In this example, search for all Proposal Titles with the word 'treatment' in them:

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

Proposal Number:	<input type="text"/>	Proposal Type:	<input type="text"/>
Status:	<input type="text"/>	Deadline Date:	<input type="text"/>
Investigator:	<input type="text"/>	Unit Number:	<input type="text"/>
Unit Name:	<input type="text"/>	Title:	<input type="text"/>
Sponsor Code:	<input type="text"/>	Sponsor Name:	<input type="text"/>
Account:	<input type="text"/>		



\*Use the asterisk, \*, in any Coeus search screen. This 'wildcard' allows you to enter fewer letters, avoid typos, and misspellings.

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

Development Proposal Search Result					
		<a href="#">Search Again</a>	<a href="#">Close Window</a>		
PROPOSAL_NUMBER	TYPE	CREATION_STATUS_CODE	TITLE	UNIT_NUMBER	UNIT_NAME
<a href="#">00000437</a>	New	Submitted	Treatment and Related Services in Support of PEPFAR in South Africa	23500000	JHPIEGO
<a href="#">00000650</a>	New	Submitted	Methionine Sulfoximine:Candidate Drug Treatment of Cerebral Edema- Liver Dis	17053000	PEDIATRICS

## Create a New Proposal

Units, Cost Centers, appear in your Unit List (show below) when you have been assigned the Coeus Role of Proposal Creator in that Unit. Select the Unit in which the Investigator plans to manage the award or project. If this list does not contain the Unit number (Cost Center) in which you wish to create your proposal record, contact the Coeus Help Desk ([coeus-help@jhu.edu](mailto:coeus-help@jhu.edu)). Tell us that you want to create a proposal and provide the Cost Center number(s) you need. Do not select an incorrect, 'substitute', number because this cannot be changed once selected.



**NOTE:** Lead Unit is the primary **department, lab, or center** that will manage the award, if funded. The Lead Unit, once selected for a proposal, cannot be edited/changed in that proposal.

Please select Unit for a New Proposal	
Unit Number	Unit Name
000001	JOHNS HOPKINS ENTERPRISE
11536000	SOCIOLOGY
16040000	HEALTH POLICY & MANAGEMENT
17070000	OTOLARYNGOLOGY-HEAD & NECK SURGERY



**NOTE:** If you need to change the Lead Unit on a proposal merely copy that proposal and select a different Lead Unit when prompted.

## Proposal Development: Initial entry screen

<a href="#">Coeus Home</a>	<a href="#">My Negotiations</a>	<a href="#">My Proposals</a>	<a href="#">My COI</a>	<a href="#">My IRB Protocols</a>	<a href="#">My IACUC Protocols</a>	<a href="#">Inbox</a>	<a href="#">My ARRA</a>	<a href="#">Logout</a>
<a href="#">All Proposals</a>   <a href="#">Proposals In Progress</a>   <a href="#">Create New Proposal</a>   <a href="#">Proposal Search</a>   <a href="#">Grants.gov Opportunity Search</a>								
<b>Proposal Summary</b>			<b>Investigator:</b> Schultz, Ronald					
<b>General Info</b> >>			<b>Agency/Sponsor:</b> Proposal #: 00029743 (In Progress)					
<b>Organization</b>			<b>Title:</b> Network Modeling for Prediction of Response to Combination Ta...					
<b>Investigators/Key Persons</b>			<b>Lead Unit:</b> 17072118 : THORACIC SURGERY					
<b>Credit Split</b>			<b>Last Updated:</b> 2012-12-19 15:57:13.0 by Schultz, Ronald					
<b>Special Review</b>			<b>General Proposal Information</b> Budget:    Narrative:					
<b>Abstract</b>			* Indicates Mandatory Fields					
<b>Science Code</b>			<b>*Proposal Type:</b> New			<b>*Activity Type:</b> Organized Research		
<b>Others</b>			<b>*Start Date:</b> 09/01/2013			<b>*End Date:</b> 08/31/2018		
<b>YNQ</b>			<b>Original Proposal Number:</b>			<b>Award #:</b>		
<b>Proposal Roles</b>			<b>*Agency/Sponsor:</b>			<b>Search</b>		
<b>Questionnaire</b>			<b>Prime Sponsor:</b>			<b>Search</b>		
<b>Research Compliance Questions</b>			<b>Proposal Deadline Date:</b> 02/05/2011			<input checked="" type="radio"/> Receipt <input type="radio"/> Postmarked		
<b>Questions for Grants.gov S2S Forms</b>			<b>NSF Science Code:</b> -----Please Select-----					
<b>Grants.Gov</b>			<b>Anticipated Award Type:</b> Grant					
<b>Budget</b>			<b>Sponsor Proposal No :</b>					
<b>Upload Attachments</b>			<b>*Title:</b>					
<b>Submit for Approval</b>			<b>Program Title:</b>					
<b>Print</b>			<b>Proposal in Response:</b> Federal Solicitation			<b>Sub Contract:</b> <input checked="" type="checkbox"/>		
<b>Delete Proposal</b>			<b>Funding Opportunity Number:</b>			<b>CFDA Number:</b>		
<b>Copy Proposal</b>			<b>Agency Program Code:</b>			<b>Agency Div Code:</b>		
<b>Email</b>			<b>Save</b>					
<b>Add New Rolodex Entry</b>								
<b>ORIS Proposal Summary Form</b>								
<b>Request New Sponsor</b>								

Proposal Summary	Proposal Summary	<b>New:</b> See description below.
General Info	General Info	Enter specific details required to save and create a proposal.
Organization	Organization	Displays Institutional contacts. Enter Subawardees and special research site locations, if pertinent.
Investigators/Key Persons	Investigators/Key Persons	Add Investigators and Key Persons and customize their unit, roles, contact and degree details. Certify Investigators.
Credit Split	Credit Split	Skip, not used by JHU.
Special Review	Special Review	Enter information for research requiring special review or approval such as use of animals or human subjects.
Abstract	Abstract	Enter text in appropriate tab screens to populate specific sponsor forms, when necessary.
Science Code	Science Code	<b>NEW:</b> Enter appropriate Science Code(s) to correspond to answers provided in the Questionnaires.
Others	Others	Enter SAP 10-digit Responsible Cost Center.
YNQ	YNQ	Skip, no longer used. See Questionnaires.
Proposal Roles	Proposal Roles	Add or remove user access to your proposal.
<b>Questionnaire</b>	<b>Questionnaire</b>	This Section will contain required question-sets based on information Preparer provides in Proposal.
Research Compliance Questions	Research Compliance Questions	Always required. Enter answers to these questions.
Questions for Grants.gov S2S Forms	Questions for Grants.gov S2S Forms	Enter answers for federal Grants.gov submissions.
Grants.Gov	Grants.Gov	Link the proposal to a Grants.gov opportunity; displays opportunity details, forms, and submission status.
Budget	Budget	Navigates to the budget screens.
Upload Attachments	Upload Attachments	Upload of files into the proposal.
Submit for Approval	Submit for Approval	Starts proposals routing for internal approval.
Print	Print	Select sponsor-forms to print, if any. This includes Grants.gov forms.
Delete Proposal	Delete Proposal	Available to Users based on their roles and Status of proposal. Deletion is permanent and irreversible.
Copy Proposal	Copy Proposal	Allows authorized users to copy all or part of the proposal to a new proposal.
Email	Email	Send email notification to other users.
Add New Rolodex Entry	Add New Rolodex Entry	Create a Rolodex entry for a person or organization needed to be named in proposal.
ORIS Proposal Summary Form	ORIS Proposal Summary Form	Renamed link to generate a PDF summary of the proposal.
Request New Sponsor	Request New Sponsor	Complete and send a Webform to Sponsored Projects Shared Services to have new sponsor added.



## 1. (new) Proposal Summary screen

Accessed from the Main Navigation Panel

CoeusLite User: Schultz, Ronald

Navigation: Coeus Home | My Negotiations | **My Proposals** | My COI | My IRB Protocols | My IACUC Protocols | Inbox | MyARRA | Logout

Sub-navigation: All Proposals | **Proposals In Progress** | Create New Proposal | Proposal Search | Grants.gov Opportunity Search

Left Sidebar: **Proposal Summary** | General Info | Organization | **Investigator/Key Persons** | Credit Split

Investigator: Schultz, Ronald  
Agency/Sponsor: 300865 : NATL INST OF HEALTH  
Title: testing  
Proposal #: 00029637 (In Progress)  
Proposal Period: 09/01/2013 - 08/31/2018

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

This window has five sections

CoeusLite User: Schultz, Ronald

Navigation: Coeus Home | My Negotiations | **My Proposals** | My COI | My IRB Protocols | My IACUC Protocols | Inbox | MyARRA | Logout

Sub-navigation: All Proposals | **Proposals In Progress** | Create New Proposal | Proposal Search | Grants.gov Opportunity Search

Left Sidebar: Back to Inbox | Proposal Summary | Full Proposal Details | All Certifications | **Approval Actions** | Validation Checks

Investigator: Schultz, Ronald  
Agency/Sponsor: 300865 : NATL INST OF HEALTH  
Title: testing  
Proposal #: 00029637 (In Progress)  
Proposal Period: 09/01/2013 - 08/31/2018

Budget Total		Indirect Cost		Total Cost	
Direct Cost	\$494,440.00	Cost Share	\$0.00	Period	09/01/2013 - 08/31/2018
Under Recovery	\$0.00				

List of Investigators/Key Persons [Show](#)  
Budget Summary [Show](#)  
Proposal Print [Show](#)

### i. Complete proposal validation



**Hint:** Do not be confused by cryptic, technical, language used in error messages. It is often helpful when first reading an error message to read the right-most phrase first, because that phrase often refers the Coeus data entry field causing the error. And, as a proposal preparer, you are often most familiar with the data entry fields.



**Hint:** Select **Validate** several times – until no additional errors are found. Coeus validation is based on a hierarchy of errors. It does not present all errors at one time. Simply select **Validate** until no errors are presented.

CoeusLite User: Schultz, Ronald

Navigation: Coeus Home | My Negotiations | **My Proposals** | My COI | My IRB Protocols | My IACUC Protocols | Inbox | MyARRA | Logout

Sub-navigation: All Proposals | **Proposals In Progress** | Create New Proposal | Proposal Search | Grants.gov Opportunity Search

Left Sidebar: Back to Inbox | Proposal Summary | Full Proposal Details | All Certifications | **Approval Actions** | Validation Checks

Investigator: Schultz, Ronald  
Agency/Sponsor: 300865 : NATL INST OF HEALTH  
Title: testing  
Proposal #: 00029637 (In Progress)  
Proposal Period: 09/01/2013 - 08/31/2018

Budget Total		Indirect Cost		Total Cost	
Direct Cost	\$494,440.00	Cost Share	\$0.00	Period	09/01/2013 - 08/31/2018
Under Recovery	\$0.00				

List of Investigators/Key Persons [Show](#)  
Budget Summary [Show](#)  
Proposal Print [Show](#)



i. Summary Information about the proposal

Investigator:	Taylor, Russell H		Proposal #:	00029616 (In Progress)	
Agency/Sponsor:	300865 : NATL INST OF HEALTH		Proposal Period:	09/01/2013 - 08/31/2018	
Title:	Network Modeling for Prediction of Response to Combination Ta...				
Budget Total					
Direct Cost	\$563,909.79	Indirect Cost	\$349,624.07	Total Cost	\$913,533.86
Under Recovery	\$0.00	Cost Share	\$0.00	Period	09/01/2013 - 08/31/2018

ii. List of Proposal Persons and access to their Certifications

List of Investigators/Key Persons					Hide
Name	Department	LU	MPI	Role	
Taylor, Russell H	<ul style="list-style-type: none"> <li>• THORACIC SURGERY</li> <li>• LABORATORY FOR COMPUTATIONAL SENSING AND ROBOTICS</li> </ul>	<input checked="" type="checkbox"/>		Principal Investigator	Certify
Yang, Stephen C	<ul style="list-style-type: none"> <li>• THORACIC SURGERY</li> </ul>			Co-Investigator	Certify
Smith, Lewis				Site Investigator, Subaward	Certify
Xu, Rongzhen				Sr. Statistician	Certify

iii. Budget summary and Budget Report Printing

Budget Summary								Hide
Budget Period								Hide
Period	Start Date	End Date	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost	
1	09/01/2013-	08/31/2014	\$108,360.00	\$67,183.20	\$0.00	\$0.00	\$175,543.20	
2	09/01/2014-	08/31/2015	\$110,527.20	\$68,526.86	\$0.00	\$0.00	\$179,054.06	
3	09/01/2015-	08/31/2016	\$112,737.74	\$69,897.40	\$0.00	\$0.00	\$182,635.14	
4	09/01/2016-	08/31/2017	\$114,992.50	\$71,295.35	\$0.00	\$0.00	\$186,287.85	
5	09/01/2017-	08/31/2018	\$117,292.35	\$72,721.26	\$0.00	\$0.00	\$190,013.61	
Budget Report								Hide
Report Name				Print Budget Comments				
<a href="#">Budget Summary by Period</a>				<input type="checkbox"/>				
<a href="#">Cost Sharing Summary by Period</a>				<input type="checkbox"/>				
<a href="#">Cumulative Budget</a>				<input type="checkbox"/>				
<a href="#">Industrial Budget by Period</a>				<input type="checkbox"/>				

iv. Grants.gov Forms Printing

Proposal Print	Hide
<b>Grants.gov</b>	Hide
Select : All   None	
<input type="checkbox"/> RR SF 424 V1-2	
<input type="checkbox"/> Performance Site V1-4	
<input type="checkbox"/> RR Other Projects V1-3	
<input type="checkbox"/> RR Key Person Expanded V1-2	
<input type="checkbox"/> RR Budget V1-1	
<input type="checkbox"/> RR SubAward Budget 30 V1.2	
<input type="checkbox"/> PHS398 Cover Page Supplement V1-4	
<input type="checkbox"/> PHS398 Research Plan V1-3	
<input type="checkbox"/> PHS398 Checklist V1-3	
<input type="button" value="Print Selected"/>	
<b>Sponsor Form Packages</b>	Hide
No Packages Found.	

## 2. General Info screen

➔ Fields with a red asterisk (\*) are required to save and generate a proposal number.

The screenshot shows the 'General Info' screen for a proposal. The left sidebar contains a list of navigation options, with 'General Info' selected. The main content area displays various fields for proposal information. Fields marked with a red asterisk (\*) are required. Red arrows point to these required fields: Proposal Type, Start Date, End Date, Agency/Sponsor, Title, and the Title field.

* Proposal Type	View the entire list of Proposal Types at: <a href="http://procoeus.jonhshopkins.edu/orisite/oris_web/oris_index.html">http://procoeus.jonhshopkins.edu/orisite/oris_web/oris_index.html</a> Select <b>User Guides</b> > #14, 'Proposal Type Decision Guide'.
* Activity Type	Select the appropriate entry from the drop-down list. <b>Appendix D</b> provides general definitions for each Activity Type.
* Start Date	Date the project is expected to start. Enter in <b>mm/dd/yyyy</b> format or use the calendar tool.
* End Date	Date the project is expected to end. Enter in <b>mm/dd/yyyy</b> format or use the calendar tool.
Original Proposal Number	If required, this is the 8-digit Coeus Institute Proposal Number found by using the <a href="#">Search</a> link. This field is required if the <i>Grants.gov Submission Type</i> is 'Change/Corrected' and may be required with certain <i>Proposal Types</i> . Call your Office of Research Administration.
Award # (number)	If required, this is the 9-digit Coeus Award number (6-digit SAP Grant number followed by '001', e.g. xxxxxx-001) found by using the <a href="#">Search</a> link. It may be required with certain <i>Proposal Types</i> . Check with your Research Administration office for details.
* Agency/Sponsor	The sponsor is the organization that will provide funding. Enter the sponsor's six-digit code in this field or use the <a href="#">Search</a> link to find it. This field is required for Grants.gov submissions.
Prime Sponsor	Only if your proposals will have an 'Anticipated Award Type' of Subgrant or Subcontract are you required to provide the Prime Sponsor. This is the entity that is actually providing the funds to your Proposal Sponsor. Otherwise, leave this field blank.
Proposal deadline date	Date the proposal is due at the sponsor.
Receipt/Postmarked	Select option required in Sponsor's funding opportunity.

<b>NSF Science Code</b>	Select this code from the drop-down list for all proposals, not just for NSF submissions. Consult your ORA for guidance.
<b>Anticipated Award Type</b>	Select the type from the drop-down list. Consult your ORA for guidance.
<b>Sponsor Proposal No. (number)</b>	Required if the <i>Proposal Type</i> is Renewal, Resubmission, Revision, or Continuation. Search the Award module or Institute Proposal module, as appropriate, to find this number.
<b>* Title:</b>	Enter the descriptive title. For electronic submission, the title should not contain any special characters. See <a href="#">What No Special Characters means?</a> The field will support 200 characters, but some sponsors may require shorter titles. Refer to the sponsor instructions.
<b>Program Title:</b>	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.
<b>Proposal in Response to:</b>	Select an entry from the drop-down list to identify how this funding opportunity was announced.
<b>Subcontract</b>	Select this checkbox if one or more subcontracts will be included in proposal budget. If there will be no subcontracts, leave it unchecked.
<b>Funding Opportunity Number</b>	For paper submissions: enter data manually. For Grants.gov submissions: enter data manually, <b>or</b> this will be populated automatically if CFDA is used to perform the Grants.gov search.
<b>CFDA Number:</b>	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. <b>Note:</b> 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.
<b>Agency Program Code:</b>	For NSF submission, enter the NSF Agency program code. For other sponsors this field has been 'repurposed'. Its content are placed contents into SF424 Form, Block 4b, 'Agency Routing Number'.
<b>Agency Division Code:</b>	For NSF submission, enter the NSF Agency program code. For other sponsors this field has been 'repurposed'. Its contents are placed into SF424 Form, Block 4a, 'Federal Identifier'.

**(new)** Adding federal agency 'Identifier' to the SF424



**NOTE:** Providing the Agency Identifier on the SF424, Blocks 4a and 4b, can now be accomplished by entering the necessary data on the General Info Screen, as shown below here.

Proposal in Response: Federal Solicitation	Sub Contract: <input checked="" type="checkbox"/>
Funding Opportunity Number: ONRBAA13-004	CFDA Number: 12.300
Agency Program Code: SF424 Block 4b	Agency Div Code: SF424 Block 4a

APPLICATION FOR FEDERAL ASSISTANCE <b>SF 424 (R&amp;R)</b>		3. DATE RECEIVED BY STATE
1.* TYPE OF SUBMISSION		4.a. Federal Identifier SF424 Block 4a
<input type="radio"/> Pre-application <input checked="" type="radio"/> Application <input type="radio"/> Changed/Corrected Application		b. Agency Routing Number SF424 Block 4b
2. DATE SUBMITTED 2013-01-17	Application Identifier 00042351	

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

Investigator:	Proposal #: 00002735 (In Progress)
Agency/Sponsor: 300865 : NATL INST OF HEALTH	Proposal Period: 07/01/2009 - 06/30/2014
Title: Evaluation of treatment plans for Restless Legs Syndrome	
Lead Unit: 16030000 : HEALTH BEHAVIOUR & SOCIETY	
Last Updated: 2008-12-14 08:24:11.0 by Schleicher, Timothy N	

### 3. Organization Screen

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.

<b>Proposal Organization</b>	DO NOT EDIT: The legal entity for the proposal. When a proposal is created, this defaults to the organization listed in the lead unit's organization field.
<b>Performing Organization</b>	DO NOT EDIT: The organization performing the main portion of the project. This will likely be the same as the Proposal Organization.
<b>Other Organization/Location</b>	Do Not Select – unless your ORA confirms that the DUNS number is required for another project organization. Then, contact <a href="mailto:coeus-help@jhu.edu">coeus-help@jhu.edu</a> .
<b>Performance Site/ Location</b>	Always Select (unless the DUNS number is required). Use this option to display <i>Subawardee institutional address</i> and <i>JHU Off Campus locations</i> .

<b>Organization:</b>	
<b>Proposal Organization:</b>	
<b>Proposal Organization</b> <b>Address:</b> McKeown MBA, JD Alexandra Johns Hopkins University Bloomberg School of Public Health 615 N. Wolfe Street, Suite W1100 Baltimore	<b>Location:</b> Johns Hopkins University <b>Cong Dist:</b> MD-007 <a href="#">Remove</a> <div> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Add"/> </div> <a href="#">Add Cong District</a>
<b>Performing Organization:</b>	
<b>Performing Organization</b> <b>Address:</b> Johns Hopkins University Bloomberg School of Public Health 615 N. Wolfe Street, Suite W1100 Baltimore MD	<b>Location:</b> Johns Hopkins University <a href="#">Search</a> <b>Cong Dist:</b> MD-007 <a href="#">Remove</a> <div> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Add"/> </div> <a href="#">Add Cong District</a>
<a href="#">Add Organization / Location</a>	
<input type="button" value="Save"/>	<div>1. Click Add Organization /Location to create additional panels.</div>

**Proposal Organization and Performing Organization** are populated from the centrally maintained data. Do not edit or removed.

Select **Add Organization/Location**, and then, **Performance Site** to add a Subaward institutional address or an Off-campus research location to the proposal.

**Performance Site** is derived from Coeus Rolodex. This database is maintained by Coeus users and, therefore is a highly flexible tool for users to create and add exact addresses to their proposals.



**NOTE:** Email [Coeus-help@jhu.edu](mailto:Coeus-help@jhu.edu) if the funding opportunity requires the DUNS number an organization other than JHU.

**NOTE:** On Grants.gov submissions, the Subawardee's DUNS number will be located on the RR Budget Form provided to you by the Subawardee Institution and not entered in this window.

To add an Other Organization from the Coeus Organization Table.

**Add Organization / Location**

Type:  Remove

Address:

Location:

Cong Dist:

**#1 Always select Performance Site.**

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

Type:  Remove

Address:

Location:

Cong Dist:

**#2 Select Find Address to search Coeus Rolodex.**

**#3 Enter the Institution's name as you want it to appear.**

**#4 Always add Congressional District code.**



#### Congressional District Codes:

- >if **within a state**, (ex. MD-007);
- >if **all districts in a state** (ex. MD-all);
- >if **Nationwide** (all districts in all states), (enter US-all).
- >if **outside the U.S.**, (enter 00-000).

## 4. Investigators & Key Personnel

**Use Coeus Premium if 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 to meet the sponsor's guidelines without having to delete entries and manually re-add them in the sponsor's desired order.



**Use Coeus Premium if you need to maintain Proposal Persons Citizenship details:**

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



Principal Investigator & Co-Investigator:

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

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

Name:

Commons User Name:

Unit:  [Search](#)

Proposal Role:

% Academic Year Effort:

- Principal Investigator & Co-Investigator** MUST BE JHU Employees. Only search using [Employee Search](#). Never search for these two Proposal Roles using ~~[Non Employee Search](#)~~.
- Rationale:** Coeus will prohibit submission of any proposal with a Rolodex person shown as either a Principal or Co-Investigator.
- If you wish to add a Principal Investigator or a Co-Investigator WHO IS NOT NOW but WILL BE a JHU employee during your project you must process an SAP form titled: "ISR Action-Mini Master COEUS SPR". Questions should be addressed to HR Shared Services at 443-997-5828. This will place them into the HR system as temporary employees. Once they are in the HR system you will be able to search for them in [Employee Search](#). Caution: This process requires several days to complete.





## Key Study Person:

**Investigators/Key Study Personnel Details**

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

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

Name:  Email:   
Commons User Name:  Fax:   
Unit:  [Search](#)  
Proposal Role:  [Key Person Role:](#)   
% Academic Year Effort: 0.0 % Summer Year Effort: 0.0

- A. May be selected from either button: [Employee Search](#) or [Non Employee Search](#) (Rolodex).
- B. Enter correct Project Role title for Key Person.
- C. Example for entering the name of the PI at a Subaward Institution:
  - a. Must be selected from Rolodex ([Non Employee Search](#)).
  - b. Cannot be a Co-Investigator on your proposal because they are not a JHU employee.
  - c. But, as a Key Person, you may assign them any Project Role title, such as:
    - i. Site Investigator
    - ii. Co-Investigator
    - iii. Collaborator

## Editing Investigator/Key Study Personnel:

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

Name:  Email:  Phone:   
Commons User Name:  Fax:  Mobile:   
Unit:  [Search](#) THORACIC SURGERY  
Proposal Role:  Multi PI ☐ % Effort:   
% Academic Year Effort:  % Summer Year Effort:  % Calendar Year Effort:

[Save](#) [Certify](#) [Send Notification](#)

List of Investigators/Key Study Personnel				View Certification				COI Disclosure Status			
Name	Department	LU	MPI	Role	T	% Effort A	S	C	Certify		
Schultz, Ronald	• THORACIC SURGERY	<input checked="" type="checkbox"/>		Principal Investigator	20.0	17.0	3.0	0.0	<a href="#">Remove</a> <a href="#">X</a> <a href="#">Details</a>		

1. Editing can be performed in either the Summary Window (shown above) or the Details window (shown below).
2. Summary window is accessed by double clicking on Person's name.
3. Edit contact information if necessary.
4. NOTE: field 'Commons User Name' is to be used for any sponsor-assigned User Name, including (but not restricted to) NIH eRA Commons User name.
5. Enter estimated percent of effort as prescribed by your Office of Research Administration.
6. Select 'Multi-PI' if relevant (NIH only)
7. Save [Save](#)



Multi PI: mark the 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.

## Editing Proposal Person Details

Employee Search | Non Employee Search

Name: Schultz, Ronald Email: rschult7@johnshopkins.edu Phone: 4105168638  
Commons User Name: Fax: Mobile:  
Unit: 17072118 Search THORACIC SURGERY  
Proposal Role: Principal Investigator Multi PI ☐ % Effort: 20.0  
% Academic Year Effort: 17.0 % Summer Year Effort: 3.0 % Calendar Year Effort: 0.0

Save Certify Send Notification

List of Investigators/Key Study Personnel				View Certification		COI Disclosure Status	
Name	Department	LU	MPI	Role	% Effort	C	Certify
Schultz, Ronald	THORACIC SURGERY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Principal Investigator	20.0	17.0 3.0 0.0	Remove

Details

## Select Detail button to open Detail window

Investigator: Schultz, Ronald Proposal #: 00029743 (In Progress)  
Agency/Sponsor: Proposal Period: 09/01/2013 - 08/31/2018  
Title: Network Modeling for Prediction of Response to Combination Ta...

Person Details for Schultz, Ronald [Return to Investigator](#)

Unit Details

Lead	Unit Number	Unit Name	Search	Remove
<input checked="" type="checkbox"/>	17072118	THORACIC SURGERY		

Add Unit

Person Details

Full Name: Schultz, Ronald User Name:   
Email Address: rschult7@johnshopkins.edu Office Phone:   
Primary Title: Business Services Analyst Directory Title:   
Home Unit: 10100801 Fax:   
Agency Credentials:   
Pager:   
Office Location: 3400 N Charles St Sec. Office Location:   
Address Line 1: 3400 N Charles St Address Line 2:   
Address Line 3: City:   
County: State/Province:   
Postal Code: 21218 Country:   
Division: UNIVERSITY ADMINISTRATION

Degrees

Degree Type	Degree	Graduation Year	School:
-------------	--------	-----------------	---------

Add Degree

Save

Previously labeled 'eRA Commons', now used for all federal user IDs.

Editable field. Enter the Division name to appear in the 'Division' field on: R&R Senior/Key Person Profile (Expanded) form, shown below (\*).

(\*)

RESEARCH & RELATED Senior/Key Person Profile (Expanded)

PROFILE - Project Director/Principal Investigator

Prefix	* First Name	Middle Name	* Last Name
	Ronald		Schultz

Position/Title: Business Services Analyst Department: OFFICE OF RESEARCH INFORMATION

Organization Name: Johns Hopkins University Division: UNIVERSITY ADMINISTRATION

\* Street1: 3400 N Charles St Street2: Wyman Park 400W

\* City: Baltimore County:



Changes made to Person Details on this screen will only be applied to, retained in, this proposal record – they will NOT update or edit the SAP HR personnel data. That must be done through the ISR process.

## Add Unit:

Additional Units can be added to the Person Detail of the Proposal.

When added, the proposal's approval map will be expanded to include the new unit.

For example, in this proposal the PI has a joint appointment:

17072118 Thoracic Surgery and 17036110 Diagnostic Radiology.

Though the proposal is being submitted through Thoracic Surgery, the PI wishes to have the other unit review the proposal as part of its submission to ORA.

Person Details for Schultz, Ronald [Return to Investigator](#)

**Unit Details**

Lead Unit Number	Unit Name	
<input checked="" type="checkbox"/> 17072118	THORACIC SURGERY	<a href="#">Search</a> <a href="#">Remove</a>

[Add Unit](#)

Unit Search - Mozilla Firefox

Go to a Website

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

Unit Number:		Unit Name:	*Diagnostic Radiology*
Administrative Officer:		Unit Head:	
Dean VP:		Other Ind To Notify:	
Osp Administrator:			

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

Unit Search - Mozilla Firefox

mrqacoeus.johnshopkins.edu/coeus/generalProposalSearch.do?type=+strType&searchName=w\_unit\_select

**Unit Search Result**

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

UNIT NUMBER	UNIT NAME	ADMINOFFICER	UNITHEAD	DEANVP	NOTIFY	ADMINTR
17036110	DIAGNOSTIC RADIOLOGY	Kurzmann, Janus A	Lewin, Jonathan	King, Landon S	English, Tavon	Rost, Amy B

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

Person Details for Schultz, Ronald [Return to Investigator](#)

**Unit Details**

Lead Unit Number	Unit Name	
<input checked="" type="checkbox"/> 17072118	THORACIC SURGERY	<a href="#">Search</a> <a href="#">Remove</a>
<input type="checkbox"/> 17036110	DIAGNOSTIC RADIOLOGY	<a href="#">Search</a> <a href="#">Remove</a>

[Add Unit](#)

‘Commons User Name’ and ‘Agency Credentials’ are: 1) same data field shown in two locations, 2) used for ALL federal agency user names NOT just NIH ‘eRA Commons’

Person Summary window continues to be labeled “Commons User Name”,

**Investigators/Key Study Personnel Details**  
*Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.*  
*Unit is required for Investigators.*  
*Key Person Role is required for Key Personnel.*  
[Employee Search](#) | [Non Employee Search](#)  
Name: Schultz, Ronald Email: rschultz7@johnshopkins.edu  
**Commons User Name:** rschultz13 Fax:   
Unit: 11556200 Search THEATRE PROGRAM  
Proposal Role: Principal Investigator Multi PI % E  
% Academic Year Effort: 17 % Summer Year Effort: % C

Person Details window has been renamed “Agency Credentials”

**Person Details**  
Full Name: Schultz, Ronald User Name: RSCHULT7  
Email Address: rschultz7@johnshopkins.edu Office Phone: 4105168638  
Primary Title: Business Services Analyst Directory Title: Business Services Analyst  
Home Unit: 10100801 School:   
**Agency Credentials:** rschultz13 Fax:   
Pager: Mobile:

Identical Fields, just different labels.

Division

Add Degree

**Degrees**  
Degree Type Degree Graduation Year School: Remove  
-----Please Select-----  
[Add Degree](#)  
Degree Type Degree Graduation Year  
Medical Doctor MD 2000  
Doctor of Public Health (DPH) DPH **2005**

Most recent Date will be shown first

Return to Investigator/Key Study Person window

Investigator: Schultz, Ronald Proposal #: 00029743 (In Progress)  
Agency/Sponsor: Proposal Period: 09/01/2013 - 08/31/2018  
Title: Network Modeling for Prediction of Response to Combination Ta...  
**Person Details for Schultz, Ronald** [Return to Investigator](#)  
**Unit Details**  
Unit Number Unit Name

## 5. (new) Person Certification Form/Questions



Person Certification form, the short questionnaire, must be complete in Coeus for EVERY person named in the proposal – PI, Co-I, and Key Persons.

### Person Certifications

#### A. 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.

#### B. How the proposal Preparer Certifies

- i) Within the Proposal, in the Investigator/Key Persons window, Select button ‘Certify’.

Name	Department	LU	MPI	Role
Schultz, Ronald	• OFFICE OF RESEARCH INFORMATION SYSTEMS			Co-Investigator
Morthole, Ellen P				Business Services Analyst
Smith MD, Lewis J.				Professor of Medicine



ii) This will take you to the Proposal Summary >Proposal Person Certification Questions window.

**CoeusLite** User: Schu

Navigation: Coeus Home | **My Proposals** | Inbox | Logout | My COI | My Negotiations | My IRB Protocols | My IACUC Protocols | My ARRA

Proposal Summary

Investigator: Proposal #: 00042351 (In Progress)  
 Agency/Sponsor: 300865 - NATL INST OF HEALTH Proposal Period: 09/01/2013 - 08/31/2018  
 Title: Slowing the Progression of Amnesic Mild Cognitive Impairment

Request Total				
Direct Cost	\$20,814,244.32	Indirect Cost	\$2,275,672.99	Total Cost
Under Recovery	\$0.00	Cost Share	\$0.00	\$23,089,917.31
			Period	09/01/2013 - 08/31/2018

Certification for: Schultz, Ronald

**Proposal Person Certification Questions**

1) Have lobbying activities been conducted on behalf of this proposal? [More](#)

2) Can you certify that the information submitted within this application is true, complete and accurate to the best of your knowledge? Please be aware that any false, fictitious, or fraudulent statements or claims may subject you, as the PI/Co-PI/Co-Investigator to criminal, civil or administrative penalties. [More](#)

3) Do you (or your spouse, domestic partner, or dependent children) have a financial interest or fiduciary relationship that 1) could be affected by the research or 2) is in an entity that could be affected by the research? This applies to current interests/relationships and those within the past 12 months. A financial interest or fiduciary relationship includes, for example, receipt or contractual entitlement to royalty, equity, or consulting remuneration, employment, and service as an officer or Board of Directors member. If you answer Yes to this question, you must disclose your financial interest or fiduciary relationship in the JHU online disclosure system, eDisclose (<http://edisclose.jhu.edu>). [More](#)

4) Are you currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from current transactions by a federal department or agency? [More](#)

5) Do you agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports? [More](#)

[Save](#)

iii) Select, click on, the Proposal Person you wish to Certify.

**CoeusLite** User: Schultz, Ro

Navigation: Coeus Home | **My Proposals** | Inbox | Logout | My COI | My Negotiations | My IRB Protocols | My IACUC Protocols | My ARRA

Proposal Summary

Investigator: Proposal #: 00042351 (In Progress)  
 Agency/Sponsor: 300865 - NATL INST OF HEALTH Proposal Period: 09/01/2013 - 08/31/2018  
 Title: Slowing the Progression of Amnesic Mild Cognitive Impairment

Request Total				
Direct Cost	\$20,814,244.32	Indirect Cost	\$2,275,672.99	Total Cost
Under Recovery	\$0.00	Cost Share	\$0.00	\$23,089,917.31
			Period	09/01/2013 - 08/31/2018

Certification for: **Smith MD, Lewis J.**

**Proposal Person Certification Questions**

1) Have lobbying activities been conducted on behalf of this proposal? [More](#)

2) Can you certify that the information submitted within this application is true, complete and accurate to the best of your knowledge? Please be aware that any false, fictitious, or fraudulent statements or claims may subject you, as the PI/Co-PI/Co-Investigator to criminal, civil or administrative penalties. [More](#)

3) Do you (or your spouse, domestic partner, or dependent children) have a financial interest or fiduciary relationship that 1) could be affected by the research or 2) is in an entity that could be affected by the research? This applies to current interests/relationships and those within the past 12 months. A financial interest or fiduciary relationship includes, for example, receipt or contractual entitlement to royalty, equity, or consulting remuneration, employment, and service as an officer or Board of Directors member. If you answer Yes to this question, you must disclose your financial interest or fiduciary relationship in the JHU online disclosure system, eDisclose (<http://edisclose.jhu.edu>). [More](#)

4) Are you currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from current transactions by a federal department or agency? [More](#)

5) Do you agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports? [More](#)

[Save](#)

- iv) Answer the questions and Save. The User Time/date stamp is updated and the Save button becomes the Print button.

**CoeusLite** User: Schultz, R  
Current Location: [Link]

[Coeus Home](#) [My Proposals](#) [Inbox](#) [Logout](#) [My COI](#) [My Negotiations](#) [My IRB Protocols](#) [My IACUC Protocols](#) [My ARR](#)

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

**Proposal Persons**

- Schultz, Ronald
- Morthole, Ellen P
- Smith MD, Lewis J. >>**

**Certification**

- ☒ Proposal Person
- ☐ Certification Questions

**Go To**

- [Proposal Summary](#)
- [Full Proposal Details](#)
- [Investigator Details](#)

**Proposal Summary**

Investigator: [Name] Proposal #: 00042351 (In Progress)  
Agency/Sponsor: 300865 : NATL INST OF HEALTH Proposal Period: 09/01/2013 - 08/31/2018  
Title: Slowing the Progression of Amnesic Mild Cognitive Impairment... [GRANTS.GOV](#)

Budget Total			
Direct Cost	\$20,814,244.32	Indirect Cost	\$2,275,672.99
Under Recovery	\$0.00	Cost Share	\$0.00
Total Cost		\$23,089,917.31	
Period		09/01/2013 - 08/31/2018	

**Certification for : Smith MD, Lewis J. and Answered By: RSCHULTZ - 03/26/2013 03:50:13**

**Proposal Person Certification Questions**

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

1) Have lobbying activities been conducted on behalf of this proposal? [More](#)  
☐ Yes ☒ No

2) Can you certify that the information submitted within this application is true, complete and accurate to the best of your knowledge? Please be aware that any false, fictitious, or fraudulent statements or claims may subject you, as the PI/Co-PI/Co-Investigator to criminal, civil or administrative penalties. [More](#)  
☐ Yes ☒ No

3) Do you (or your spouse, domestic partner, or dependent children) have a financial interest or fiduciary relationship that 1) could be affected by the research or 2) is in an entity that could be affected by the research? This applies to current interests/relationships and those within the past 12 months. A financial interest or fiduciary relationship includes, for example, receipt or contractual entitlement to royalty, equity, or consulting remuneration, employment, and service as an officer or Board of Directors member. If you answer Yes to this question, you must disclose your financial interest or fiduciary relationship in the JHU online disclosure system, eDisclose (<http://edisclose.jhu.edu>). [More](#)  
☐ Yes ☒ No

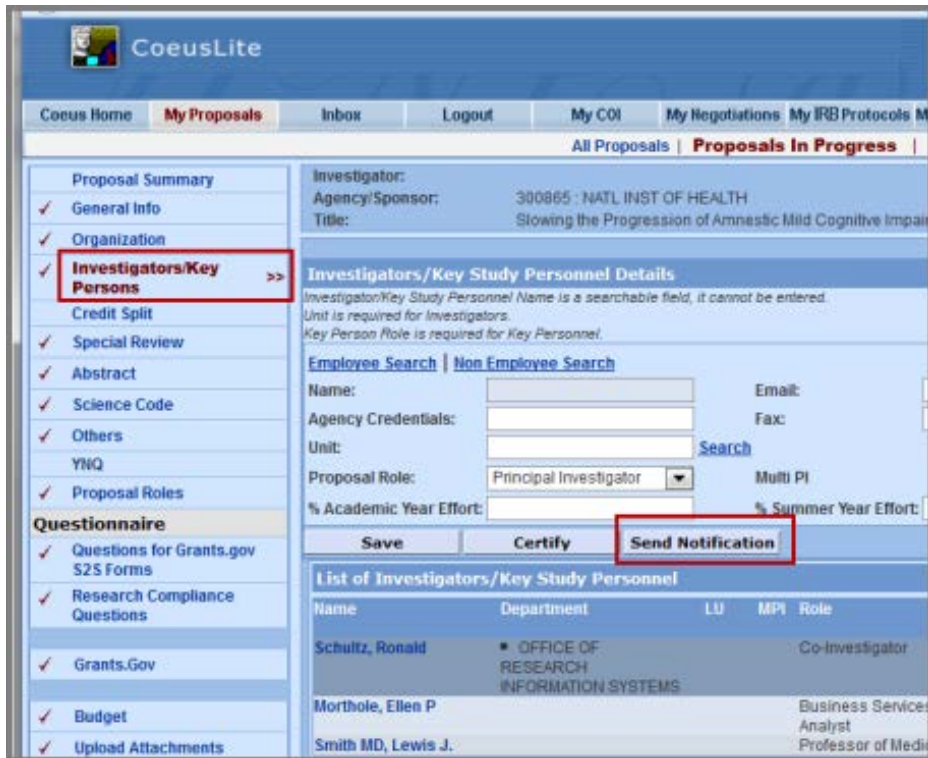
4) Are you currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from current transactions by a federal department or agency? [More](#)  
☐ Yes ☒ No

5) Do you agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports? [More](#)  
☐ Yes ☒ No

**Print**

### C. How to notify Investigators to complete their own Certification

- i) Within the Proposal, in the Investigator/Key Persons window, Select button 'Send Notification'.



**CoeusLite**

Coeus Home | **My Proposals** | Inbox | Logout | My COI | My Negotiations | My IRB Protocols

All Proposals | **Proposals In Progress**

Proposal Summary  
✓ General Info  
✓ Organization  
✓ **Investigators/Key Persons** >>  
Credit Split  
✓ Special Review  
✓ Abstract  
✓ Science Code  
✓ Others  
YNQ  
✓ Proposal Roles

Investigator:  
Agency/Sponsor: 300865 : NATL INST OF HEALTH  
Title: Slowing the Progression of Amnesic Mild Cognitive Impairment

**Investigators/Key Study Personnel Details**  
Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.  
Unit is required for Investigators.  
Key Person Role is required for Key Personnel.  
[Employee Search](#) | [Non Employee Search](#)  
Name: \_\_\_\_\_ Email: \_\_\_\_\_  
Agency Credentials: \_\_\_\_\_ Fax: \_\_\_\_\_  
Unit: \_\_\_\_\_ [Search](#)  
Proposal Role: Principal Investigator Multi PI  
% Academic Year Effort: \_\_\_\_\_ % Summer Year Effort: \_\_\_\_\_

**Questionnaire**  
✓ Questions for Grants.gov  
S2S Forms  
✓ Research Compliance Questions  
Grants.Gov  
✓ Budget  
✓ Upload Attachments

**Save** **Certify** **Send Notification**

**List of Investigators/Key Study Personnel**

Name	Department	LU	MPI	Role
Schultz, Ronald	OFFICE OF RESEARCH INFORMATION SYSTEMS			Co-Investigator
Morthole, Ellen P				Business Services Analyst
Smith MD, Lewis J.				Professor of Medicine

- ii) In the Pop-Up Window Select (JHU) Investigators to receive the automatic email notification. Do not select Rolodex Persons.



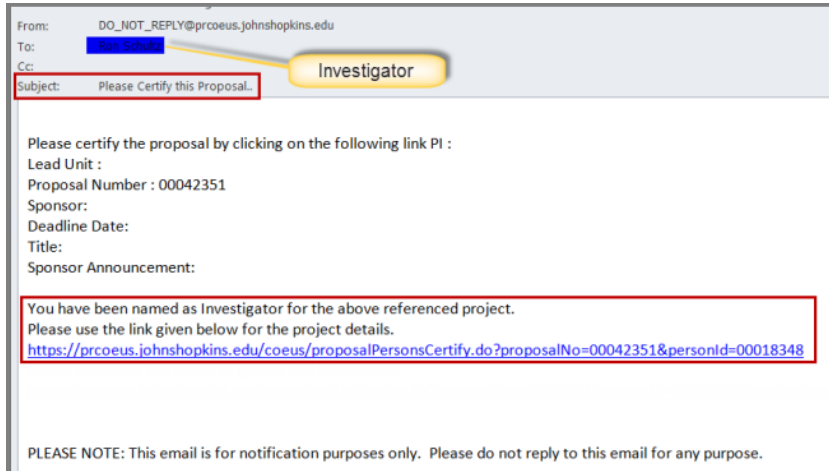
**Send Notification**

Select	Name	Last Notification
<input type="checkbox"/>	Schultz, Ronald	2013-03-28 12:18:32.0
<input checked="" type="checkbox"/>	Morthole, Ellen P	
<input type="checkbox"/>	Smith, Lewis J.	

**Select: All** **None** **Send** **Close**

#### D. How a JHU Investigator can complete their Certification

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



ii)

iii) Investigator should:

(1) Follow the Link: "... given below for the project details."

(2) Logon to CoeusLite: Enter their JHED credentials.



(3) Complete the questions and SAVE;

CoeusLite

Proposal Summary

Investigator:	300885 NATL INST OF HEALTH	Proposal #:	00042351 (In Progress)
Agency/Sponsor:	300885 NATL INST OF HEALTH	Proposal Period:	09/01/2013 - 09/31/2018
Title:	Slowing the Progression of Amnesic Mild Cognitive Impairment.		
Budget Total:	\$200,000.00	Indirect Cost:	\$124,000.00
Direct Cost:	\$0.00	Indirect Cost:	\$0.00
Under Recovery:	\$0.00	Total Cost:	\$324,000.00
		Period:	09/01/2013 - 09/31/2018

Proposal Person Certification Questions

Questions: 1 2 3 4 5

1) Have lobbying activities been conducted on behalf of this proposal?  
☐ Yes ☐ No [More](#)

2) Can you certify that the information submitted within this application is true, complete and accurate to the best of your knowledge? Please be aware that any false, fictitious, or fraudulent statements or claims may subject you, as the PI/Co-PI/Co-Investigator to criminal, civil or administrative penalties.  
☐ Yes ☐ No [More](#)

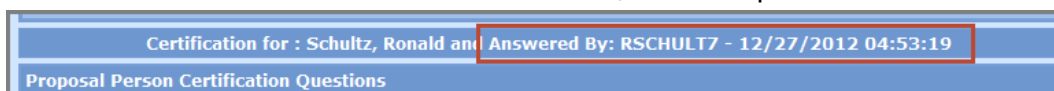
3) Do you (or your spouse, domestic partner, or dependent children) have a financial interest or fiduciary relationship that 1) could be affected by the research or 2) is an entity that could be affected by the research? This applies to current interests/relationships and those within the past 12 months. A financial interest or fiduciary relationship includes, for example, receipt or contractual entitlement to royalty, equity, or consulting remuneration, employment, and service as an officer or Board of Directors member. If you answer Yes to this question, you must disclose your financial interest or fiduciary relationship in the JHU online disclosure system, etc. (http://disclosure.jhu.edu).  
☐ Yes ☐ No [More](#)

4) Are you currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from current transactions by a federal department or agency?  
☐ Yes ☐ No [More](#)

5) Do you agree to accept responsibility for the scientific conduct of this project and to provide the required progress reports?  
☐ Yes ☐ No [More](#)

**Save**

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



## 6. (ignore) Credit Split

***This functionality is NOT used at Johns Hopkins.***

## 7. Special Reviews

Special Reviews [Proposal No. - 00003592]

\*Indicates Required Fields

Special Review

\*Special Review : ----Please Select----

\*Approval: ----Please Select----

Protocol No: Application Date: Approval Date:

Comments:

Save

Given the complexity of the Special Review process, it is advisable that you contact your Research Administration Office with specific questions.

- Click Special Review drop-down box
- Select Special Review type
- Click Approval drop-down box
- Select appropriate status

If:

- Pending: all required information *has* been entered.
- Submitted: the Application Date of the Regulatory Review must be entered.
- Approved: Protocol Number field *and* Approval Date field must be completed.
- Exempt: (only for Grants.gov submission) Protocol Number field *and* Approval Date field must be completed. Further, the exempt code must be entered in the Comments field. For example the R&R Other Project Information Form, box(s) in field 1a to be checked. Multiple Exempt Codes must be separated by a comma (i.e. E1,E4).

- Save the entry.

Save

Special Review

\*Special Review : Human Subjects

\*Approval: Exempt

Protocol No: 03-10-06-06e Application Date: Approval Date: 1/17/2010

Comments: E2,E5

List of Special Review					
Special Review	Approval	Protocol No	Application Date	Approval Date	Comments
Human Subjects	Exempt	03-10-06-06e		01/17/2010	<a href="#">View</a> <a href="#">Remove</a>



## 8. Abstracts

Abstracts are text boxes for specific subjects. Though not used by many sponsors, if required you can type, or cut/paste text under the appropriate category. For example, NSF allows Investigators to submit names of either possible proposal Reviewers, or persons not to be considered as a Review.

Save **Save**

**Abstract**

[Project Summary](#) [Technical Abstract](#) [Lesson Abstract](#) [Labs](#) [Clinical](#) [Abstract](#) [Sponsor](#) [SOP](#) [Out](#) [F](#) [With](#) [F](#) [List](#)

[Other Resources](#) ☒ [Suggested Reviewers](#) [Publications](#) [Reviewers No](#)

Michael Calvin, MD, PhD  
1234 Catlin Commons  
Medical School  
Duke University

Last Updated by : Schultz, Ronald at 04-Feb-2013 07:00:45 AM

**Save**

**Abstract selections – click to navigate to desired panel.**

**Type or paste in text in open field. See sponsor instructions for content requirements.**

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

## 9. (new)Science Code

Select Add Science Code

Science Code

**Add Science Code**

Code	Description

Select Search

Science Code

Number/Code:  **Search**

Description:

Enter wildcard, asterisk '\*', into search field

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

Code  **Search**

Select the appropriate Code and Save

SCIENCE_CODE	DESCRIPTION
1	AIDS/HIV
10	International Programs
11	Foundation Relations
12	HIPAA
13	Confidentiality Agreement
14	ARRA (American Recovery and Reinvestment Act)
15	Master Agreement
16	Inter-Governmental Personnel Agreements (IPA)
17	Competitive Supplement
18	Administrative Supplement
19	No Cost Extension
2	Cancer
3	Vaccine
4	Women's Health
5	Internal Proposal
6	Hopkins
7	Maryland
8	Baltimore
9	Career Award



## 10. Others

The **OTHERS** Screen is used to convey pertinent information to Approvers and ORA Submitter. SAP Responsible Cost Center is required.

**Others**

\* Indicates Mandatory Fields

\*SAP RESP COST CENTER 1704652701

Comments 255 characters

NASA NSPIRES AOR User Name ...for NASA grants.gov

Proposal Contact your name

Proposal Contact Email your email

Proposal Contact Telephone your phone

**REQUIRED FIELD: Enter 10-digit SAP Responsible Cost Center corresponding to Proposal's 8-digit Lead Unit selected when proposal was initially created.**

Save

## 11. **(abolished)** YNQ: Yes No Questions

YNQ are **no longer used** in Coeus. Previously entered YNQ answers can be viewed by selecting ORIS Proposal Summary Form. The YNQ questions are now asked on other Questionnaires.

## 12. Assign Proposal Roles

**Select to perform search of available Coeus users.**

**Select to remove user.**

Role	Definition
Aggregator	Make changes to any part of the proposal, certify investigators, submit for approval, Recall proposal after workflow/before any approvals.
Approver	Approve the proposal. You cannot add or delete users from this role, but you can see which users have been designated as approvers after the proposal is routed for approval.
Budget creator	Create and edit to the budget, only.
Narrative writer	Create and edit the narratives, only.
Viewer	View any part of the proposal. Cannot edit.



**Use Coeus Premium if 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.
- In Premium, open proposal Action>Show Routing.

## 13. (new) Questionnaire Section

1. **Questions for Grants.gov S2S Forms** Is required in every proposal with a federal sponsor. Answer No if proposals will not be submitted electronically to Grants.gov. Answer Yes (and subsequent questions) if proposal will be submitted electronically. Answers will populate relevant Grants.gov forms.
2. **Research Compliance Questions** Is required in every proposal to provide information to the JHU offices of research administration. This questionnaire replaces the old JHU eIS form.
2. **other questionnaires...** Other question-sets will appear based on information the Preparer has provided in the proposal. For example, Training Grants will generate the appropriate questionnaire after the proposal is linked to Grants.gov.

## 14. Grants.gov, System-to-System (S2S), proposals



Prior to entering this section on the **General Info** screen you must: 1) saved the proposal, 2) selected the appropriate federal sponsor (only federal agencies are eligible), and 3) entered the fields: Funding Opportunity Number [recommended] or CFDA Number (not both).

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

#### a. Grants.gov search results (example shown was generated from FOA PA-11-260).

- Click on **Select** to choose this opportunity and retrieve the submission requirements:

- Results of selecting a Grants.gov opportunity package (default view):

**Logo indicates link.**

**Defaults to Application, but can be selected another Submission Type.**

**Forms included in the package by the sponsor.**

**Mandatory forms have green Checks.**

**Optional forms must be checked to be included.**

Form Name	Mandatory	include	Desc	Select to Print: All Included
PHS Cover Letter V1-2		<input type="checkbox"/>	Available	<input type="checkbox"/>
RR SF 424 V1-2	✓	✓	Available	<input type="checkbox"/>
Performance Site V1-4	✓	✓	Available	<input type="checkbox"/>
RR Other Projects V1-3	✓	✓	Available	<input type="checkbox"/>
RR Key Person Expanded V1-2	✓	✓	Available	<input type="checkbox"/>
RR Budget V1-1		<input type="checkbox"/>	Available	<input type="checkbox"/>
RR SubAward Budget 30 V1.2		<input checked="" type="checkbox"/>	Available	<input type="checkbox"/>
PHS398 Cover Page Supplement V1-4	✓	✓	Available	<input type="checkbox"/>
PHS398 Modular Budget V1-2		<input type="checkbox"/>	Available	<input type="checkbox"/>
PHS398 Research Plan V1-3	✓	✓	Available	<input type="checkbox"/>
PHS398 Checklist V1-3	✓	✓	Available	<input type="checkbox"/>

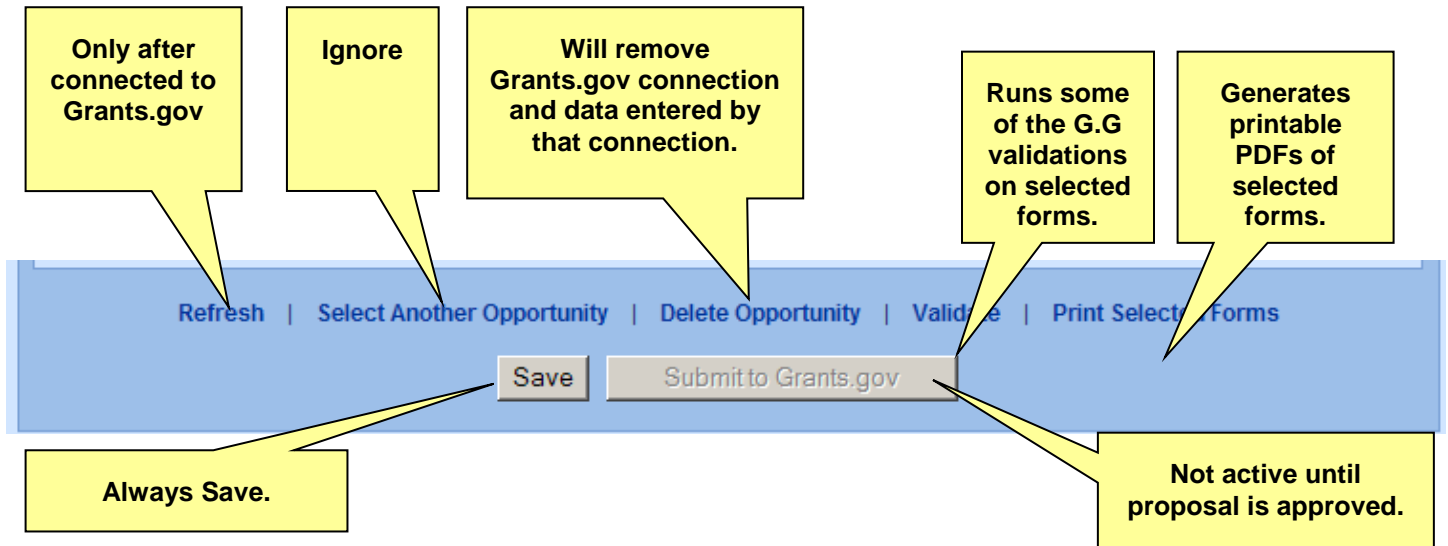
- Review list of required forms (forms must be marked **Available** in the **Desc** column if required for this S2S submission).

SFLLL V1-1	<input type="checkbox"/>	Available	<input type="checkbox"/>
ANA_ApplicationInfo	<input checked="" type="checkbox"/>	Not Available	<input type="checkbox"/>

- 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



- Other Grants.gov screen functions:



## 15. (new) Using Budgeted TBA positions in Grants.gov submissions



**Caution – Do not use the button ‘Add TBA’ for Grants.gov submissions.** Coeus is designed to only place “Find Person” budget persons onto the RR Budget, Section A.



**If your Sponsor and Funding Opportunity require TBAs to be listed in the RR Budget, Section A, you must use the button ‘Find Person’ and enter in Last Name column ‘tba\*’.** These TBA positions are uniquely numbered and can therefore be separately listed in Section A.



**Caution – NIH does not allow TBA budgeted positions in RR Budget, Section A.** Under SF 424 Guidelines RR Budget Section A is ‘pre-populated’ from Senior/Key Person Profile. And, persons entered in Senior/Key Person Profile Must have a biosketch; therefore, TBAs cannot be added to Senior/Key Person Profile.



**NIH submissions in which the Budget contains Senior TBA positions, i.e. faculty, must be created in Premium Budget, in order to place the TBA faculty in RR Budget Section B as required by NIH.** See Premium User Guide>Budget>Budget Categories, for the steps necessary to change the Cost Element/Line Item Budget Category before adding the Budget Person. CoeusLite does not have Category edit functionality.

## 16. Budget Screens

Go directly into the Proposal Budget in Edit mode by selecting:

The screenshot shows the CoeusLite interface. At the top, the user is identified as 'Schultz, Ronald'. Below the navigation bar, there is a section titled 'List of Proposals In Progress'. This section contains a table with the following columns: Proposal Number, Status, Title, Lead Unit, PI, and Budget. The table lists two proposals. The first proposal, 00047096, is in 'In Progress' status and has a title 'Budget - for calculating the correct Calc Base when Ann ...'. A red arrow points to the 'Budget' link in the 'Budget' column for this proposal.

Proposal Number	Status	Title	Lead Unit	PI	Budget
00047096	In Progress	Budget - for calculating the correct Calc Base when Ann ...	11556200	Schultz, Ronald	<a href="#">Budget</a>
00047087	In Progress	Little Heartbeats	11556200	Schultz, Ronald	<a href="#">Budget</a>

This will not place your lock on Proposal Detail, thus allowing another user to edit that section of the proposal.

Or, go into the budget from Proposal Detail, in Edit mode, by selecting:

The diagram illustrates the navigation structure between the Proposal and Budget screens. It consists of two side-by-side panels: 'Proposal Navigation Menu' and 'Budget Navigation Menu'.

**Proposal Navigation Menu:**

- General Info >>
- Organization
- Investigators/Key Persons
- Credit Split
- Special Review
- Abstract
- Others
- YNQ
- Proposal Roles
- Questionnaire**
- Research Compliance Questions
- Grants.Gov
- Budget**
- Upload Attachments
- Validate
- Submit for Approval
- Print
- Delete Proposal
- Copy Proposal
- Email
- Add New Rolodex Entry
- Proposal Summary
- Request New Sponsor

**Budget Navigation Menu:**

- Return To Proposal**
- Budget Versions
- Budget Summary
- Print
- Budget Set Up**
- Personnel >>
- Adjust Periods
- Proposal Rates
- Validate
- Budget Periods**
- Personnel Budget
- Equipment
- Travel
- Participant/Trainee
- Other Direct Costs
- Modular Budget
- Cost Sharing Distribution
- Under Recovery Distribution
- Project Income
- Generate All Periods

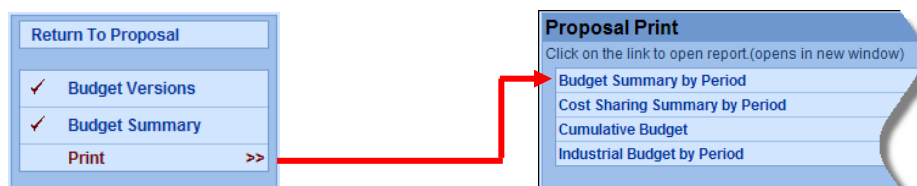
Red arrows indicate the following navigation paths:

- From 'Return To Proposal' in the Budget Navigation Menu to 'General Info' in the Proposal Navigation Menu.
- From 'Budget' in the Proposal Navigation Menu to the Budget Navigation Menu.



Return To Proposal	Return To Proposal	Select to return the general proposal navigation panel.
✓ Budget Versions	Budget Versions	Displays a summary line for all budget versions created. Default budget launch screen when more than one budget version exists.
✓ Budget Summary	Budget Summary	Displays summary budget information; i.e. budget totals, direct and indirect costs, underrecovery, cost sharing, period budget totals, etc.
Print	Print	Navigates to the Budget print options screen (*)
<b>Budget Set Up</b>	<b>Budget Set Up</b>	Group header for 3 budget set-up screens:
✓ Personnel	Personnel	a. Add personnel for budgeting; enter salary details required for expense calculations.
Adjust Periods	Adjust Periods	b. Allows users to modify budget start and end dates, or to add or modify budget periods, or period lengths.
✓ Proposal Rates	Proposal Rates	c. Displays institute overhead rates; allows for insertion of applicable rates.
Validate	Validate	Use the Validate tool to process Budget Business Rule Validations maintained by JHU.
Sync Calculated Line Item costs	Sync Calculated Line Item costs	JHU does not use.
<b>Budget Periods</b>	<b>Budget Periods</b>	CoeusLite separates Cost Elements into these five budget categories:
✓ Personnel Budget	Personnel Budget	1. Add or remove personnel expense, customize their effort and time spent on this project.
Equipment	Equipment	2. Add or remove equipment expenses
Travel	Travel	3. Add or remove travel expenses
Participant/Trainee	Participant/Trainee	4. Add or remove participant/trainee expenses
Other Direct Costs	Other Direct Costs	5. Add or remove all other expenses.
Modular Budget	Modular Budget	Navigate to Modular Budget entry screen
Cost Sharing Distribution	Cost Sharing Distribution	Navigate to Cost Sharing Distribution entry screen
Under Recovery Distribution	Under Recovery Distribution	Navigate to Under Recovery Distribution entry screen
Project Income	Project Income	Navigate to Project Income entry screen
Generate All Periods	Generate All Periods	Calculate budget periods based on period 1 entries and create required additional budget period screens.
Sub Award Budget	Sub Award Budget	(new) auto fill Subaward cost elements.

(\*) See next page picture for Proposal Print screenshots...







(new) Budget Summary box is editable, when no detailed budget is built in Coeus.

Return To Proposal

✓ Budget Versions

✓ Budget Summary >>

Print

Budget Set Up

✓ Personnel

Adjust Periods

✓ Proposal Rates

Validate

Sync Calculated Line Item costs

Budget Periods

Personnel Budget

Equipment

Travel

Participant/Trainee

Other Direct Costs

Modular Budget

Cost Sharing Distribution

Under Recovery Distribution

Project Income

Generate All Periods

Investigator: Schultz, Ronald

Agency/Sponsor: 301393 : WASHINGTON UNIV

Title: HOPE VI, Segregation, Disparities in Obesity and Diabetes

Proposal #: 00035005 (In Progress)

Proposal Period: 09/01/2013 - 08/31/2018

Version: 4

Budget Summary

Budget Summary : Version 4

Budget Status: Incomplete

Final: ☐

Modular Budget: ☐

Submit Cost Sharing: ☒

On/Off Campus: Default

Total Cost Limit: \$0.00

Residual Funds: \$0.00

Total Direct Cost Limit: \$0.00

OverHead Rate Type: MTDC

Underrecovery Rate Type: MTDC

Comments:

Budget Totals

Direct Cost : \$15.00

Indirect Cost : \$7.50

Total Cost : \$22.5

Under Recovery : \$0.00

Cost Share : \$0.00

Period : 09/01/2013 08/31/2018

Budget Periods

Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	09/01/2013	08/31/2014	12.0	\$1.00	\$0.50	\$0.00	\$0.00	\$1.50
2	09/01/2014	08/31/2015	12.0	\$2.00	\$1.00	\$0.00	\$0.00	\$3.00
3	09/01/2015	08/31/2016	12.0	\$3.00	\$1.50	\$0.00	\$0.00	\$4.50
4	09/01/2016	08/31/2017	12.0	\$4.00	\$2.00	\$0.00	\$0.00	\$6.00
5	09/01/2017	08/31/2018	12.0	\$5.00	\$2.50	\$0.00	\$0.00	\$7.50

CoeusLite Version 4.5.1.

Johns Hopkins University

Page 38



**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.

The browser Pop-up Blocker will block display of the **Line Item Edit or Detail** screens in the **Budget Category>Periods** window (**Personnel, Equipment, Travel, Participant/Trainee, or Other Direct Costs**).

## A. Budget Set up requirements

Budget Set Up	
✓	<b>Personnel</b>
	Adjust Periods
✓	<b>Proposal Rates</b>

The first time you navigate to the Proposal's Budget you will be presented with **Budget Set Up > Personnel** screen. If you previously entered a **Non-Employee Search**, Rolodex, person, in the **Investigators/Key Persons** screen then at this point in the budget process you will be prompted to **Sync Budget Persons**. You should select the correct Appointment Type and Job Code and save the entry.

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

Investigator: Schultz, Ronald  
Agency/Sponsor: 300865 : NATL INST OF HEALTH  
Title: NKCC1: A master of glioma stem cell regulation  
Proposal #: 00041887 (In Progress)

**Sync Budget Persons**

Please select Appointment Type and Jobcode for following persons

Name	Appointment Type	Job Code
Smith, Lewis, J.	12M EMPLOYEE	999999

Save

### Budget Set Up

#### Budget Setup

#### Personnel

## B. 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 SAP HR.
  - **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:

Return To Proposal	Investigator: Schultz, Ronald		Proposal #: 00041887 (In Progress)	
✓ Budget Versions	Agency/Sponsor: 300855 - NATL INST OF HEALTH		Proposal Period: 06/30/2013 - 06/29/2015	
✓ Budget Summary	Title: NKCC1: A master of glioma stem cell regulation		Version: 2	
Print				
<b>Budget Set Up</b>				
✓ <b>Personnel</b> >>				
Adjust Periods				
✓ Proposal Rates				
Validate				
Sync Calculated Line Item costs				
Budget Periods				

Name	Job Code	Appointment Type	Eff Date	Base Salary	Anniv Date	Remove	Base Salary by Period
Schultz, Ronald	U0151	12M EMPLOYEE	06/30/2013	\$0.00		<a href="#">Remove</a>	<a href="#">Base Salary by Period</a>
Smith, Lewis, J.	U0101	12M EMPLOYEE	06/30/2013	\$0.00		<a href="#">Remove</a>	<a href="#">Base Salary by Period</a>
Taylor, Robert E	U0151	12M EMPLOYEE	06/30/2013	\$0.00		<a href="#">Remove</a>	<a href="#">Base Salary by Period</a>

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

[Save](#)

- Select [Add Employee](#) to search the Johns Hopkins employees or select [Add Non Employee](#) to search the Rolodex.

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

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

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

- [Search](#) for the employee by entering data into the fields on the search screen.
  - Use the asterisk ( \* ) before and/or after data in fields to widen searches and minimize typed entries.
  - Select search [Search](#) to display the search results.

Person Search Result							
<a href="#">Search Again</a>				<a href="#">Close Window</a>			
FULL_NAME	PRIOR_NAME	USER_NAME	HOME_UNIT	SCHOOL	EMAIL_ADDRESS	DIRECTORY_TITLE	OFFICE_LOCATION
<a href="#">Chen, Aaron</a>	-	<a href="#">ACHEN33</a>	<a href="#">17053130</a>	-	<a href="#">coeus-help@jhu.edu</a>	<a href="#">Assistant Professor</a>	<a href="#">Cmsc 144</a>
<a href="#">Chen, Alic</a>	-	<a href="#">ACHEN32</a>	<a href="#">000001</a>	-	<a href="#">coeus-help@jhu.edu</a>	-	-
<a href="#">Chen, Allen R</a>	-	<a href="#">ACHEN1</a>	<a href="#">17051112</a>	-	<a href="#">coeus-help@jhu.edu</a>	<a href="#">Associate Professor</a>	<a href="#">Crb 2M53</a>
<a href="#">Chen, Alvin</a>	-	<a href="#">CE01ACHEN43</a>	<a href="#">000001</a>	-	<a href="#">coeus-help@jhu.edu</a>	-	<a href="#">5801 Smith Avenue, Suite 400</a>
<a href="#">Chen, Amy X</a>	-	<a href="#">XCHEN12</a>	<a href="#">11524000</a>	-	<a href="#">coeus-help@jhu.edu</a>	-	<a href="#">Mergenthaler 256</a>
<a href="#">Chen, Bai-Chi</a>	-	<a href="#">BCHEN3</a>	<a href="#">13533310</a>	-	<a href="#">coeus-help@jhu.edu</a>	<a href="#">Faculty</a>	<a href="#">Leakin Hall 1st Fl</a>
<a href="#">Chen, Bai-Chi</a>	-	<a href="#">BCHEN10</a>	<a href="#">17046512</a>	-	<a href="#">coeus-help@jhu.edu</a>	<a href="#">Faculty</a>	<a href="#">B Bldg</a>

- **Select** the appropriate person displayed in the **Person Search Results** screen. Take time to scroll across the entire window to assure you select the correct person – some individuals may appear more than once.



## Add TBA:



**Caution – Do not use the button ‘Add TBA’ for Grants.gov submissions.** Use only ‘Find Person’ and enter in Last Name column ‘tba\*’. ‘Add TBA’ selections will NOT appear in RR Budget.

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

TBA Persons		
TBA Id	Name	Job Code
1	Lab Tech	U0161
2	Post Doc Fellow	U0147
3	Research Assistant	U0161
4	Graduate Student	U0081
5	Research Nurse	U0161
6	Statistician	U0161
7	Research Technician	U0161
	Data Entry Assistant	

## Result of Add TBA selection:

Budget Personnel							
Name	Job Code	Appointment Type	Eff Date	Base Salary	Anniv Date	Remove	Base Salary by Period
Faculty	U0101	12M EMPLOYEE	04/01/2014	\$179,700.00		<a href="#">Remove</a>	<a href="#">Base Salary by Period</a>
Schultz, Ronald	U0151	12M EMPLOYEE	04/01/2014	\$75,000.00		<a href="#">Remove</a>	<a href="#">Base Salary by Period</a>
Statistician	U0161	12M EMPLOYEE	04/01/2014	\$55,000.00		<a href="#">Remove</a>	<a href="#">Base Salary by Period</a>
<a href="#">Add Employee</a>   <a href="#">Add Non Employee</a>   <a href="#">Add TBA</a>   <a href="#">Calculate All Base Sal</a>							
<input type="button" value="Save"/>							

3. **Enter Eff Date** The Effective Date displayed automatically defaults to the start date of the proposal; however, if planned salary increases are expected, more precise amounts are obtained when you enter the effective date of the new salary.
4. **Enter Base Salary:** Enter the person's full annual salary – *as it relates to the length of appointment entered* – as of the “Eff Date”. Use care when entering the amount. Do not use commas.
5. **Confirm Job Code:** This field is a required field populated by the SAP HR Group and Subgroup. This data field corresponds to the cost element, Line Item, **Description**, to be completed at **Budget Periods>Personnel Budget**.
6. **Confirm Appointment Type:** Review that this information is correct; it is part of the calculation that charges salary to the budget. Select the appropriate appointment type from the dropdown list:

- “M” refers to months of appointment; i.e. a professor with a 9-month appointment will display as **9M EMPLOYEE**.
- **12M EMPLOYEE** refers to a Regular Employee with a 12-month salary base.
- **SUM EMPLOYEE** refers to a Summer Appointments only (do not use to represent faculty summer salary).
- **TMP EMPLOYEE** refers to a Temporary Appointment only.
- **NEVER select 12M DURATION!!**

7. **Enter Anniv Date:** Enter the person’s salary anniversary date. This functionality allows Coeus to prorate a person’s salary inflation to their specific salary anniversary date.



Anniversary Date, if blank, will result in Coeus applying inflation rates on July 1<sup>st</sup> of each budget period. Anniversary Date is an editable field formatted to MM/DD/YYYY. However, though YYYY is required, only the MM/DD will control the inflation date calculation.

8. (new) **Base Salary by Period** Grants.gov RR Budget, Period Base Salary, **will only be completed if** you perform this operation for every budget period to appear in Section A.

Select **Base Salary by Period**

Select Calculate

Period	Base Salary
1	\$0.00
2	\$0.00
3	\$0.00
4	\$0.00
5	\$0.00

Save Calculate Close

Select Save

Period	Base Salary
1	\$108,211.80
2	\$111,458.15
3	\$114,801.90
4	\$118,245.96
5	\$121,793.33

Save Calculate Close

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

Save

## Adjust Periods

### C. Adjust Periods (boundaries)

Coeus will create default budget periods based on 12-month budget periods using the Start and End dates you entered on the **General Info** screen of the proposal. If the sponsor's funding opportunity announcement indicates other boundaries, you must change the default budget periods in the manner described here. In example shown below, the sponsor requires two 18 month budget periods and two 12 month budget periods.

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









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

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

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

**Save**

**Adjust Period Boundaries**

Period	* Start Date	* End Date	
1	07/01/2011 	12/31/2012 	<a href="#">Remove</a>
2	01/01/2013 	06/30/2014 	<a href="#">Remove</a>
3	07/01/2014 	06/30/2015 	<a href="#">Remove</a>
4	07/01/2015 	06/30/2016 	<a href="#">Remove</a>

[Add Period](#)

**Save**



When copying a proposal with Start and End dates that do not match your new submission:

>Adjust the Start and End dates on the **General Info**;

>Make the necessary changes for your new proposal on the **Adjust Periods** screen;

>Do not forget:

~**Proposal Rates** screen: Sync – and Save – Proposal Rates;

~**Budget Personnel** screen: Update the “Eff Dates” for the “Base Salary” amounts!

Number of months contained in each budget period in **Adjust Periods** is now displayed on two CoeusLite screens: **Budget Summary** and **Budget Periods > Personnel Budget**. These new displays are:



## Budget Summary

### Budget Summary : Version 4

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

**Save**

### Budget Totals

Direct Cost : \$108,463.77	Indirect Cost : \$69,416.81	Total Cost : \$177,880.58
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2011 - 06/30/2016

### Budget Periods

Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	07/01/2011	12/31/2012	18.0	\$36,874.11	\$23,599.43	\$0.00	\$0.00	\$60,473.54
2	01/01/2013	06/30/2014	18.0	\$25,855.73	\$16,547.67	\$0.00	\$0.00	\$42,403.40
3	07/01/2014	06/30/2015	12.0	\$26,631.41	\$17,044.10	\$0.00	\$0.00	\$43,675.51
4	07/01/2015	06/30/2016	12.0	\$19,102.52	\$12,225.61	\$0.00	\$0.00	\$31,328.13

**Period 1** Period 2 Period 3 Period 4

Direct Cost :\$36,874.11	Indirect Cost :\$23,599.43	Total Cost :\$60,473.54
Under Recovery :\$0.00	Cost Share :\$0.00	Period :07/01/2011 - 12/31/2012

No. of Months :18.0

### Personnel Budget

Name	<input type="text" value="Schultz, Ronald"/>	Salary Type	<input type="text" value="SALARY - FACULTY FT/PT"/>	<a href="#">Edit</a>   <a href="#">Remove</a>
Period	<input type="text" value="Calendar"/>	%Charged	<input type="text" value="5.00"/>	%Effort
Start Date:	<input type="text" value="07/01/2011"/>	End Date:	<input type="text" value="12/31/2012"/>	Months
Requested Salary(\$)	<input type="text" value="\$8,437.51"/>	Fringe Benefit(\$)	<input type="text" value="\$2,742.19"/>	Funds Requested(\$)
				<input type="text" value="\$11,179.70"/>

## Proposal Rates

### D. Proposal Rates

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

**Activity Type: Organized Research**

**F and A**

Rate Type	On Off Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate
MTDC	Off	2010	07/01/2009	64.0	64.0
MTDC	On	2010	07/01/2009	64.0	64.0
	Off				26.0

**Fringe Benefits**

Rate Type	On Off Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate
Faculty and Staff FT/PT	Off	2010	07/01/2009	32.5	32.5
Faculty and Staff FT/PT	On	2010	07/01/2009	32.5	32.5
	Off				33.0

**Inflation**

Rate Type	On Off Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate
Faculty Salaries (7/1)	Off				
Faculty Salaries (7/1)	On				
Faculty Salaries (7/1)	Off				
Faculty Salaries (7/1)	On	2011			3.0
Students (7/1)		2013	07/01/2012	3.0	
Students (7/1)	On	2011	07/01/2012	3.0	3.0
Students (7/1)	Off	2011	07/01/2013	3.0	3.0
Students (7/1)	On	2014	07/01/2013	3.0	3.0

**Caution:**  
You must *manually* 'Save' table after 'Sync' or 'Reset', or Sync/Reset will NOT take effect.

**Reset** **Sync** **Save**

Rates are defaulted in based on our federally negotiated rate agreement with DHHS. You may change any rate shown on this table. Rates on this table apply only to *this* proposal.



Select **Sync and Save** at the bottom of the screen: if you have opened or copied an older proposal, or revised the start and end date of your proposal, to update your proposal budget with the Institute Rates effective for your budget periods.  
Select **Reset and Save**: if you wish to change rates **you** previously inserted.

**CAUTION:** always select **Save** as a final step – no **Save** warning is displayed on this screen.

To modify the applicable rates for this proposal:

1. Open the **Proposal Rates** screen.
2. Note that the default Inflation Rate, Applicable Rate, is
3. Scroll down to the appropriate category of the screen and enter the percent rate to be used for your 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.
4. **Save** your newly edited **Proposal Rates** by scrolling down to the bottom of the screen and select **Save**.

**Save**

#### Example: Review/Modify Faculty Inflation

Rate Type	On Off Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate
Faculty Salaries (7/1)	Off	2011	07/01/2010	3.0	3.0
Faculty Salaries (7/1)	On	2011	07/01/2010	3.0	3.0
Administrative Salaries (7/1)	Off				3.0
Administrative Salaries (7/1)	On				3.0
Non-Administrative Staff Salaries (7/1)	Off	2011	07/01/2010	3.0	3.0
Non-Administrative Staff Salaries (7/1)	On		07/01/2010	3.0	3.0
Materials and Services	Off				0
Materials and Services	On				0
Bargaining Units (7/1)	Off	2011	07/01/2010	3.0	3.0
Bargaining Units (7/1)	On	2011	07/01/2010	3.0	3.0
Students (7/1)	Off	2011	07/01/2010	3.0	3.0
Students (7/1)	On	2011	07/01/2010	3.0	3.0

**Reset** **Sync** **Save**

**Enter desired inflation values....**

**...for each Rate Type (cost element) to be included in your budget.**



**Inflation rates** may be applied by Rate Type (cost element), separately for each Budget Period and for On and/or Off Campus.



Most **Rate Types** (shown above) represent personnel budget line item descriptions contained in **Budget Periods > Personnel Budget > Salary Types**, depicted as:

Salary Type: **SALARY - FACULTY FT/PT**



**Rate Types for Materials and Services** (also shown above) represent all non-personnel budget line items listed under **Budget Periods: Equipment, Travel, Participant/Trainee, and Other Direct**

**Cost**, depicted as: 


Type
Please Select

.

## Personnel Budget

### E. Personnel Budget

When first opened, the **Personnel Budget** screen displays only Period 1.

Period 1 

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

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

**Save**

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

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

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

**Budget Personnel**

**Click here to select all, or check individually.**

<input type="checkbox"/>	Name	Job Code	Appointment Type
<input type="checkbox"/>	Taylor, Robert E	U0051	REG EMPLOYEE
<input type="checkbox"/>	Schleicher, Timothy N	U0151	REG EMPLOYEE
<input type="checkbox"/>	Barrios, Alice, L	99999	REG EMPLOYEE
<input type="checkbox"/>	Research Assistant	U0161	REG EMPLOYEE
<input type="checkbox"/>	Research Nurse	U0161	9M DURATION

**Save**

- Select **Save**.

**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. Because of the Sync Budget Person prompt during set up, you may need to maintain persons on this list which were in your proposal, but not included in your budget.

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

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

Customize each person.

Defaults to Project Period Boundaries. Revise these dates to achieve your desired budget.

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. (\*)

Subtotal of all personnel

**Personnel Budget**

Direct Cost :  
Under Recovery :

Cost : \$0.00  
Period : 07/01/2009 - 06/30/2010

Name	Period	Start Date	End Date	Requested Salary(\$)	Fringe Benefit(\$)	Funds Requested(\$)
Taylor, Robert E	Academic	07/01/2009	06/30/2010	\$0.00	\$0.00	\$0.00
Schleicher, Timothy N	Academic	07/01/2009	06/30/2010	\$0.00	\$0.00	\$0.00
Barrios, Alice, L	Academic	07/01/2009	06/30/2010	\$0.00	\$0.00	\$0.00
Research Assistant	Academic	07/01/2009	06/30/2010	\$0.00	\$0.00	\$0.00

**Buttons:** Add Person | Calculate | Save

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

Salary Type	Start Date	End Date	Fringe Benefit(%)	Funds Requested(\$)
<b>Total Funds Requested(\$)</b>				\$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 CoeusLite. Also, without details, they cannot be displayed like those entered in CoeusLite. Instead, they will be displayed below the detailed personnel with associated expenses included in the Total Funds Requested for that period.

## 2. Customize each Personnel Line Item:

<b>Name</b>	Schleicher, Timothy N	<b>Salary Type</b>		<a href="#">Edit</a>   <a href="#">Remove</a>	
<b>Period</b>	Academic	<b>%Charged</b>	0.00	<b>%Effort</b>	0.00
<b>Start Date:</b>	07/01/2009	<b>End Date:</b>	06/30/2010	<b>Months</b>	0.0
<b>Requested Salary(\$)</b>	\$0.00	<b>Fringe Benefit(\$)</b>	\$0.00	<b>Funds Requested(\$)</b>	\$0.00

- **Select** the appropriate **Salary Type** from the drop-down menu. **Salary Type** is the Cost Element Description viewed in Premium. 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:** Same as Calendar, 12 month project period.
  - **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 **Budget 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** to recalculate and save customized. [Save](#)
- **Select Calculate** (located below all of the personnel entries) if you want to see how a changed entry impacts the budget.

<b>Name</b>	Schleicher, Timothy N	<b>Salary Type</b>	SALARY - FACULTY FT/PT	<a href="#">Edit</a>   <a href="#">Remove</a>	
<b>Period</b>	Calendar	<b>%Charged</b>	10.00	<b>%Effort</b>	10.00
<b>Start Date:</b>	07/01/2009	<b>End Date:</b>	06/30/2010	<b>Months</b>	1.2
<b>Requested Salary(\$)</b>	\$4,500.00	<b>Fringe Benefit(\$)</b>	\$1,462.50	<b>Funds Requested(\$)</b>	\$5,962.50

### 3. Enter Personnel Line Item Details

Name	Schleicher, Timothy N	Salary Type	SALARY - FACULTY FT/PT	<a href="#">Edit</a>   <a href="#">Remove</a>	
Period	Calendar	%Charged	10.00	%Effort	10.00
Start Date	07/01/2009	End Date	06/30/2010	Months	1.2
Requested Salary(\$)	\$4,500.00	Fringe Benefit(\$)	\$1,462.50	Funds Requested(\$)	\$5,962.50

- 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:

<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>		<a href="#">Close</a>	
Name: Schleicher, Timothy N					
Project Role: Undefined		Undefined			
Description:					
Start Date: 07/01/2009		End Date: 06/30/2010			
Cost:	\$4,500.00	Cost Sharing:	\$0.00	Underrecovery:	\$0.00
Apply Inflation: <input checked="" type="checkbox"/>					
<b>Rates Applicable to the Line Item</b>					
Rate Types	Apply	Cost	Cost Sharing		
MTDC	<input checked="" type="checkbox"/>	\$3,816.00	\$0.00		
Faculty and Staff FT/PT	<input checked="" type="checkbox"/>	\$1,462.50	\$0.00		
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>		<a href="#">Close</a>	



**Reminder!** 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:

- Personnel Line Item Detail window is grayed out and uneditable – from this window.
- These fields are edited in two other windows:
  - **Description** and **Start** and **End** Dates: edit on **Budget Periods > Personnel Budget**.
  - **Rate Types / Apply**: edit on the **Budget Set Up > Proposal Rates Table**.

If you've made any edits select:

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

If there are no edits select:

- [Close](#)



## Equipment

### F. Equipment Screen

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

Period 1

Period Totals		
Direct Cost : \$13,250.00	Indirect Cost : \$8,480.00	Total Cost : \$21,730.00
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2009 - 06/30/2010

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

Type	Description	Funds Requested (\$)	Edit	Remove
<div>Please Select</div> <div>CAPITAL EQUIPMENT</div>		\$0.00		
Total Equipment		\$0.00		

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

[Save](#)

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

- Select a **Type** from the drop-down menu.
  - The only Equipment budget Type is CAPITAL EQUIPMENT.
- Enter a **Description**. Descriptions entered in the Capital Equipment budget line item 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.

Select [Save](#) to save your entered budget item. [Save](#). And if there are no edits, select [Close](#).

Period 1

Period Totals		
Direct Cost : \$24,750.00	Indirect Cost : \$8,480.00	Total Cost : \$33,230.00
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2009 - 06/30/2010

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

Type	Description	Funds Requested (\$)	
CAPITAL EQUIPMENT	Electron Microscope	\$11,500.00	<a href="#">Edit</a> <a href="#">Remove</a>
Total Equipment		\$11,500.00	

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

[Save](#)

## 2. Enter Equipment **Line Item Details**

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

**Line Item Details**

[Save and Apply to Current Period](#) [Save and Apply to Current and Later Periods](#) [Close](#)

Description:

Start Date:  End Date:  Quantity:

Cost:  Cost Sharing:  Underrecovery:

Apply Inflation: ☒ On Campus: ☒

**Rates Applicable to the Line Item**

Rate Types	Apply	Cost	Cost Sharing
Calculated Amounts are not available			

[Save and Apply to Current Period](#) [Save and Apply to Current and Later Periods](#) [Close](#)

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

- **Description:** Change the line item description as needed.
- **Start Date** and **End Date:** Change if relevant or required based on the sponsor instructions.
- **Quantity:** 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 Research Administration office to comply with Institution 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.

## Travel

### G. 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
  - Travel budget options include:
    - Domestic Travel
    - Foreign 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. **Save**

Period 1

Period Totals		
Direct Cost : \$24,750.00	Indirect Cost : \$8,480.00	Total Cost : \$33,230.00
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2009 - 06/30/2010

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

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

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

**Save**

Results after entry:

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

Type	Description	Funds Requested (\$)		
TRAVEL - DOMESTIC	Seattle, WA	\$1,755.00	Edit	Remove
TRAVEL - FOREIGN	Toronto, CAN	\$2,758.00	Edit	Remove
Total Travel Cost		\$4,513.00		

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

**Save**

## 2. Enter Travel [Line Item Details](#)

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

Line Item Details				
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>		<a href="#">Close</a>
<b>Description:</b> Scientific review meeting - PI required				
<b>Start Date:</b> 07/01/2009	<b>End Date:</b> 06/30/2010	<b>Quantity:</b> 0.00		
<b>Cost:</b> \$1,200.00	<b>Cost Sharing:</b> \$0.00	<b>Underrecovery:</b> \$0.00		
<b>Apply Inflation:</b> <input checked="" type="checkbox"/>	<b>On Campus:</b> <input checked="" type="checkbox"/>			
<b>Rates Applicable to the Line Item</b>				
<b>Rate Types</b>	<b>Apply</b>	<b>Cost</b>	<b>Cost Sharing</b>	
MTDC	<input checked="" type="checkbox"/>	\$768.00	\$0.00	
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>		<a href="#">Close</a>

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 Research Administration office to comply with Institutional 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.

## Participant/Trainee

### H. Participant/Trainee screen

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

1. Select **Add Participant/Trainee** to add all of these costs to be included in the budget.

- Select a **Type** from the drop-down menu.
  - Participant/Trainee budget options include:
    - Degree Seeking Post-Doc Tuition and Fees (no F&A applied)
    - Stipend - Fellowship (F&A applied)
    - Non-Degree Seeking Post-Doc Tuition (no F&A applied)
    - Trainee Travel (F&A applied)
- Enter a **Description**. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.
- Enter a cost in the **Funds Requested (\$)** field – **do not use commas**.
- Select **Calculate** to see how this item impacts budget totals. (Coeus will calculate automatically upon Save.)
- Select **Remove** to delete the entry.
- Select **Save** to save your entered budget item. **Save**

Period 1

<b>Period Totals</b>		
<b>Direct Cost :</b> \$28,750.00	<b>Indirect Cost :</b> \$11,040.00	<b>Total Cost :</b> \$39,790.00
<b>Under Recovery :</b> \$0.00	<b>Cost Share :</b> \$0.00	<b>Period :</b> 07/01/2009 - 06/30/2010

<b>Budget Participant / Trainee</b>			
Type	Description	Qty	Funds Requested (\$)
-----Please Select-----		0.00	\$0.00
<b>Total Participant/Trainee Support Costs</b>			<b>\$0.00</b>
<a href="#">Add Participant/Trainee</a>   <a href="#">Calculate</a>			
<b>Save</b>			

### Results after entry:

<b>Budget Participant / Trainee</b>			
Type	Description	Qty	Funds Requested (\$)
STIPENDS - FELLOWSHIPS	Short term trainees (3 months each)	3.00	\$27,500.00
<b>Total Participant/Trainee Support Costs</b>			<b>\$27,500.00</b>
<a href="#">Add Participant/Trainee</a>   <a href="#">Calculate</a>			
<b>Save</b>			

## 2. Enter Participant/Trainee [Line Item Details](#)

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

Line Item Details				
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>		<a href="#">Close</a>
<b>Description:</b> <input type="text" value="Short term trainees (3 months each)"/>				
<b>Start Date:</b> <input type="text" value="07/01/2009"/>	<b>End Date:</b> <input type="text" value="06/30/2010"/>	<b>Quantity:</b> <input type="text" value="3.00"/>		
<b>Cost:</b> <input type="text" value="\$27,500.00"/>	<b>Cost Sharing:</b> <input type="text" value="\$0.00"/>	<b>Underrecovery:</b> <input type="text" value="\$0.00"/>		
<b>Apply Inflation:</b> <input checked="" type="checkbox"/>	<b>On Campus:</b> <input checked="" type="checkbox"/>			
<b>Rates Applicable to the Line Item</b>				
<b>Rate Types</b>	<b>Apply</b>	<b>Cost</b>	<b>Cost Sharing</b>	
<b>Calculated Amounts are not available</b>				
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>		<a href="#">Close</a>

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 Research Administration office to comply with Institutional 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](#), or
- [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.



**Use Coeus Premium if your proposal includes expense line items not shown under Participant / Trainee in CoeusLite:**

Coeus Premium allows you to change the budget 'category' of any non-personnel expense, CoeusLite does not. So, in Premium you can include any cost element and create a more robust Participant Expense budget.

## Other Direct Costs

### I. Other Direct Costs screen

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

Period 1

**Period Totals**

<b>Direct Cost :</b> \$56,250.00	<b>Indirect Cost :</b> \$11,040.00	<b>Total Cost :</b> \$67,290.00
<b>Under Recovery :</b> \$0.00	<b>Cost Share :</b> \$0.00	<b>Period :</b> 07/01/2009 - 06/30/2010

**Budget Other Direct Costs**

Type	Description	Funds Requested (\$)		
-----Please Select-----		\$0.00	<a href="#">Edit</a>	<a href="#">Remove</a>
<b>Total Other Direct Costs</b>		<b>\$0.00</b>		

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

[Save](#)



## Results after entries:

Budget Other Direct Costs				
Type	Description	Funds Requested (\$)	Edit	Remove
LAB MATERIALS & SUPPLIES	Reagents and Chemical	\$17,500.00	Edit	Remove
CONSULTANT SVCS	External advisor	\$6,500.00	Edit	Remove
PRINTING	in house publication costs	\$500.00	Edit	Remove
Total Other Direct Costs		\$24,500.00		

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

### b. Enter Direct Cost [Line Item Details](#)

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

Line Item Details			
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>	
Description: Reagents and Chemical			
Start Date: 07/01/2009	End Date: 06/30/2010	Quantity: 0.00	
Cost: \$17,500.00	Cost Sharing: \$0.00	Underrecovery: \$0.00	
Apply Inflation: <input checked="" type="checkbox"/>	On Campus: <input checked="" type="checkbox"/>		
Rates Applicable to the Line Item			
Rate Types	Apply	Cost	Cost Sharing
MTDC	<input checked="" type="checkbox"/>	\$11,200.00	\$0.00
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>	

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 Research Administration office to comply with Institutional 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 **Other Direct Costs** screen as needed.

## 2. Other Budgeting Features

### a. Cost Sharing

*Please review the appropriateness and administrative policy of cost sharing with your Research Administration 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.

Line Item Details			
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>	
		<a href="#">Close</a>	
Description:	Electron Microscope		
Start Date:	07/01/2009	End Date:	06/30/2010
Quantity:	0.00		
Cost:	\$11,500.00	Cost Sharing:	\$5000.00
Underrecovery:	\$0.00		
Apply Inflation:	<input checked="" type="checkbox"/>	On Campus:	<input checked="" type="checkbox"/>

**Result after entry:**

Period 1	Period 2	Period 3	Period 4	Period 5
<b>Period Totals</b>				
Direct Cost : \$223,430.00		Indirect Cost : \$118,035.20		Total Cost : \$341,465.20
Under Recovery : \$0.00		Cost Share : \$7,500.00		Period : 07/01/2009 - 06/30/2010
<b>Budget Equipment - List items and dollar amount for each item exceeding \$5000</b>				
Type	Description	Funds Requested (\$)		
CAPITAL EQUIPMENT	Electron Microscope	\$11,500.00	Edit	Remove
Total Equipment		\$11,500.00		
<a href="#">Add Equipment</a>   <a href="#">Calculate</a>				

## b. Underrecovery

Coeus will automatically calculate underrecovery when F&A and/or Fringe Benefit rates other than our negotiated rates are used.

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** checkboxes 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			
Rate Types	Apply	Cost	Cost Sharing
MTDC	<input checked="" type="checkbox"/>	\$1,258.00	\$0.00
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>	
<a href="#">Close</a>			

**Result of unchecked Apply MTDC Rate:**

Line Item Details				
<a href="#">Save and Apply to Current Period</a>		<a href="#">Save and Apply to Current and Later Periods</a>		<a href="#">Close</a>
<b>Description:</b>	Domestic meeting: PI attendance required			
<b>Start Date:</b>	01/01/2009	<b>End Date:</b>	12/31/2009	<b>Quantity:</b> 0
<b>Cost:</b>	\$1,850.00	<b>Cost Sharing:</b>	\$0.00	<b>Underrecovery:</b> \$1,258.00
<b>Apply Inflation:</b>	<input checked="" type="checkbox"/>	<b>On Campus:</b>	<input checked="" type="checkbox"/>	
<b>Rates Applicable to the Line Item</b>				
<b>Rate Types</b>	<b>Apply</b>	<b>Cost</b>	<b>Cost Sharing</b>	
MTDC	<input type="checkbox"/>	\$0.00	\$0.00	

## Generate All Periods

### J. Generate All Periods from your Detailed Period 1 Budget



Changes in the Inflation rates will not be update to generated budgets.

So, prior to using **Generate All Periods**, edit **Proposal Rates**>Inflation Rates, if necessary.

Or, 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.

Return To Proposal
✓ Budget Versions
✓ Budget Summary
Print
<b>Budget Set Up</b>
✓ Personnel
Adjust Periods
✓ Proposal Rates
Validate
<b>Budget Periods</b>
Personnel Budget >>
✓ Equipment
Travel
Participant/Trainee
✓ Other Direct Costs
Modular Budget
Cost Sharing Distribution
Under Recovery Distribution
Project Income
<b>Generate All Periods</b>

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.

Generally, Line Items that do not appear in every Period, are not include it in Period 1 prior to Selecting **Generate All Periods**. Rather, you may simplify the edit process by adding those Line Items after Selecting **Generate All Periods**.

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 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

**Proposal Number:** 00001654 **Budget Version :** 1  
**Proposal Title:** Sample proposal for screen shots  
**Investigator Name:** Schleicher, Timothy N  
**Period : 1** 01 Jul 2009 - 30 Jun 2010

	Personnel Category	Start Date	End Date	EB Rate	Vac Rate	Percentage Charged/Effort	Fringe Benefits	Salaries & Wages
Senior Personnel								
Schleicher, Timothy N	SALARY - FACULTY FT/PT	07/01/09	06/30/10	32.50%		10.0 / 10.0	\$1,462	\$4,500
Total Senior Personnel							\$1,462	\$4,500
Other Personnel								
Taylor, Robert E	SALARY - ADMIN STAFF FT/PT	07/01/09	06/30/10	32.50%		10.0 / 10.0	\$1,788	\$5,500
Total Other Personnel							\$1,788	\$5,500
TOTAL SALARIES & WAGES								\$10,000
Fringe Benefits: Total Fringe Benefits and Vacation Accrual:								\$3,250
TOTAL SALARIES & WAGES & FRINGE BENEFITS								\$13,250
Equipment								
CAPITAL EQUIPMENT - Electron Microscope								\$11,500
Total Equipment							\$11,500	
Materials								
LAB MATERIALS & SUPPLIES - Reagents and Chemical								\$17,500
Total Materials							\$17,500	
Other Operating Expenses								
PRINTING - in house publication costs								\$500
Total Other Operating Expenses							\$500	
Professional Services/Consultant								
CONSULTANT SVCS - External advisor								\$6,500
Total Professional Services/Consultant							\$6,500	

### Calculation Methodology

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

CAPITAL EQUIPMENT - Electron Microscope	\$11,500
FELLOWSHIP - PAYROLL - Short term trainees (3 months each)	\$27,500
<b>Total exclusions from F&amp;A base</b>	<b>\$39,000</b>

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

<b>Total exclusions from Allocated Expense base</b>	<b>\$0</b>
---	------------

### F&A (Indirect) Cost Rates and Base

Start Date	End Date	Campus	Rate	Rate Type	Base	Indirect Cost
------------	----------	--------	------	-----------	------	---------------

This is the budget format displayed during the CoeusLite 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.

## Generate All Periods

### 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.

#### Generate Periods

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

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

- b. A confirmation screen will display upon completion.

#### Generate Periods

Budget Periods are generated successfully

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

Period 1 Period 2 Period 3 Period 4 Period 5

Direct Cost : \$223,430.00  
Under Recovery : \$0.00

Indirect Cost : \$118,035.20  
Cost Share : \$7,500.00

Total Cost : \$341,465.20  
Period : 07/01/2009 - 06/30/2010

### 3: Adjust budget by period

To review and edit budget line items, Select the Budget Category (**Personnel Budget, Equipment, Travel**, etc.), then select the Budget Period. 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

## K. (new) Subaward Budgeting



**Generate All Periods** must be completed *before* Subaward budgeting can be executed.

### 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.

- (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.

Sub Award budget

Organization Name: Iowa State University

Description:

File Name: C:\Users\rschult7\Desktop\RR Attachments\RR Subaward bud... Browse...

RR Sub Iowa Sml budget.pdf

Save Cancel

- (9) View: full Upload history.

Sub Award budget

[Add Subaward](#)

Organization Name	Form Name	PDF	XML	Details	View Form	View XML	Remove
Iowa State University	RR Budget V1-1	✓	✓	Details			

Details

Attachments : RR Sub Iowa Sml budget.pdf

PDF File : RR Sub Iowa Sml budget.pdf

PDF Last Updated : 2012-12-27 08:59:09.0 by RSCHULT7

XML Last Updated : 2012-12-27 08:59:09.0 by RSCHULT7

Sub Award Last Updated : 2012-12-27 08:59:09.0 by RSCHULT7

Namespace : http://apply.grants.gov/forms/RR\_Budget-V1.1

Status : XML Generated successfully

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

Sub Award budget

[Add Subaward](#)

Organization Name	Form Name	PDF	XML	Details	View Form	View XML	Remove
Iowa State University	RR Budget V1-1	✓	✓	Details			

Sub Award Details - Mozilla Firefox

Go to a Website

Organization Name: Iowa State University

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

Save Sync XML Close

- (11) Coeus will automatically allocate Subawardee's budget to correct JHU cost elements.

Period 1 Period 2 Period 3 Period 4 Period 5

**Period Totals**

Direct Cost : \$5,000.00 Indirect Cost : \$3,100.00 Total Cost : \$8,100.00 No. of Months : 12.0  
Under Recovery : \$0.00 Cost Share : \$0.00 Period : 09/01/2013 - 08/31/2014

**Budget Other Direct Costs**

Type	Description	Funds Requested (\$)	
COPYING EXPENSE		\$0.00	Edit Remove
SUBAWARD DIRECT EXPENSE (included in MTDC)	Iowa State University	\$3,000.00	Details Remove
SUBAWARD F&A (included in MTDC budget)	Iowa State University	\$2,000.00	Details Remove

Total Other Direct Costs \$5,000.00

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

**Save**

(12) And, Coeus will calculate the JHU Indirect Cost

**Budget Summary**

**Budget Summary : Version 3**

Budget Status: Incomplete Final: ☐ Modular Budget: ☐ Submit Cost Sharing: ☒  
On/Off Campus: Default Total Cost Limit: \$0.00  
Residual Funds: \$0.00 Total Direct Cost Limit: \$0.00  
OverHead Rate Type: MTDC Underrecovery Rate Type: MTDC  
Comments:

**Budget Totals**

Direct Cost : \$25,000.00 Indirect Cost : \$15,500.00 Total Cost : \$40,500.00  
Under Recovery : \$0.00 Cost Share : \$0.00 Period : 09/01/2013 08/31/2018

**Budget Periods**

Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	09/01/2013	08/31/2014	12.0	\$5,000.00	\$3,100.00	\$0.00	\$0.00	\$8,100.00
2	09/01/2014	08/31/2015	12.0	\$5,000.00	\$3,100.00	\$0.00	\$0.00	\$8,100.00
3	09/01/2015	08/31/2016	12.0	\$5,000.00	\$3,100.00	\$0.00	\$0.00	\$8,100.00
4	09/01/2016	08/31/2017	12.0	\$5,000.00	\$3,100.00	\$0.00	\$0.00	\$8,100.00
5	09/01/2017	08/31/2018	12.0	\$5,000.00	\$3,100.00	\$0.00	\$0.00	\$8,100.00

(13) 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](mailto:coeus-help@jhu.edu) for guidance.

# Budget Summary

## L. Budget Summary Screen

Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
07/01/2011	06/30/2012	12.0				\$0.00	\$0.00	\$82,500.00


On this screen, you can review your project costs: direct and indirect costs (totals and by project period), number of Months per 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 Research Administration 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).
- 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.
- **Un-**Select the *Submit Cost Sharing* checkbox if you DO NOT want cost sharing to be printed on Grants.gov forms, or otherwise submitted to sponsor. That is, leave the checkbox checked (it is checked by default) and Coeus will transmit cost sharing amounts generated in the 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* (for reference purposes only – this will NOT restrict your budget).
- Change the *Over Head Rate Type* and/or *Underrecovery Rate Type*.
- Enter text in the *Comments* field to make notes about this budget.

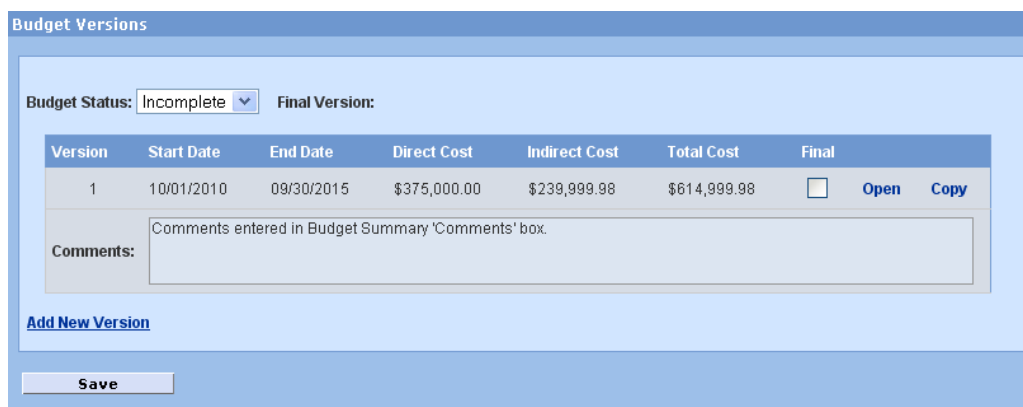
Once you have completed your changes to this screen, Select **Save** .

## Budget Versions

### M. Budget Versions Screen

#### 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:

Version	Start Date	End Date	Direct Cost	Indirect Cost	Total Cost	Final
1	10/01/2010	09/30/2015	\$375,000.00	\$239,999.98	\$614,999.98	<input type="checkbox"/> <b>Open</b> <b>Copy</b>

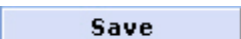
Comments:

[Add New Version](#)

**Save**

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

- Read the descriptive *Comment* you previously added to each Budget Version on the **Budget Summary** 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.
- Select **Open** to navigate to the Budget details of a particular version.
- Select **Copy** to create an alternate budget scenario *From* the selected Budget version – you can choose to copy Period 1, or all periods.
- Select **Add New Version** to create a brand 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.

**Budget Versions**

Budget Status: Incomplete Final Version: 2

Version	Start Date	End Date	Direct Cost	Indirect Cost	Total Cost	Final		
1	07/01/2011	06/30/2014	\$471,093.38	\$114,299.76	\$585,393.14	<input type="checkbox"/>	Open	Copy
<b>Comments:</b> Includes Subaward to Dr. Calvin at Duke University + Lab Manager								
2	07/01/2011	06/30/2014	\$254,211.75	\$133,895.52	\$388,107.27	<input checked="" type="checkbox"/>	Open	Copy
<b>Comments:</b> No Subaward + Lab Manager Full Time + PI at 15%.								

[Add New Version](#)

**Save**

## Modular Budget

### Coeus Lite and Modular Budgets (NIH ONLY)

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

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

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

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

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

OR

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

If your Research Administration office 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.

**Budget Summary**

**Budget Summary : Version 3**

Budget Status:  Final: ☐ **Modular Budget:** ☒ Submit Cost Sharing: ☒  
 On/Off Campus:  Total Cost Limit:   
 Residual Funds:  Total Direct Cost Limit:   
 OverHead Rate Type:  Underrecovery Rate Type:   
 Comments: Detail Budget>No Subaward + Lab Manager Full Time + PI at 15%>Basis for Modular Budget.

**Save**

**Budget Totals**

Direct Cost : \$254,211.75 Indirect Cost : \$133,895.52 Total Cost : \$388,107.27  
 Under Recovery : \$0.00 Cost Share : \$0.00 Period : 07/01/2011 - 06/30/2014

**Budget Periods**

Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	07/01/2011	06/30/2012	12.0	\$103,398.75	\$56,575.20	\$0.00	\$0.00	\$159,973.95
2	07/01/2012	06/30/2013	12.0	\$74,513.79	\$38,000.00	\$0.00	\$0.00	\$112,602.61
			12.0	\$76,200.00			\$0.00	\$115,530.74

## Modular Budget

### N. 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**

Period 1 | Period 2 | Period 3 | Cumulative  
 Period: 07/01/2011 - 06/30/2012

**Direct Costs**

Direct Cost less Consortium F&A:   
 Consortium F&A:   
 Total Direct Costs: **\$125,000.00**

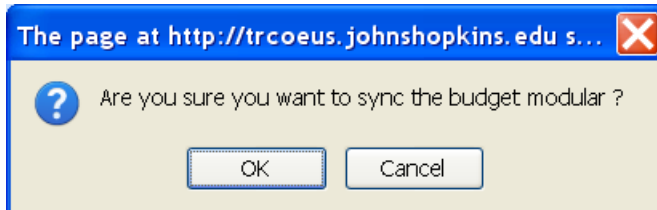
**Indirect Costs**

Rate Number	Indirect Cost Type	IDC Rate(%)	IDC Base	Funds Requested(\$)	
1	MTDC	64.0	\$88,398.75	\$56,575.20	<a href="#">Remove</a>
Total Indirect Costs:				<b>\$56,575.20</b>	
Total Funds Requested:				<b>\$181,575.20</b>	

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

**Save**

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



- Review the data defaulted in *each* of the Period tabs.
  - If the estimated costs are not accurate, edit the entry in the *Direct Cost less Consortium F&A* field to reflect the appropriate number of \$25,000 modules. Also, you may need to edit the entries for IDC Base and Funds requested to match the number of modules you are requesting.

Period 1	Period 2	Period 3	Cumulative		
Period: 07/01/2011 - 06/30/2012					
<b>Direct Costs</b>					
Direct Cost less Consortium F&A:			\$125,000.00		
Consortium F&A:			\$0.00		
Total Direct Costs:			\$125,000.00		
<b>Indirect Costs</b>					
Rate Number	Indirect Cost Type	IDC Rate(%)	IDC Base	Funds Requested(\$)	
1	MTDC	64.0	\$88,398.75	\$56,575.20	<a href="#">Remove</a>
Total Indirect Costs:				\$56,575.20	
Total Funds Requested:				\$181,575.20	
<a href="#">Add Indirect Cost</a>   <a href="#">Sync with Detailed Budget</a>					
<input type="button" value="Save"/>					

d. Select **Save**



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

For Period 1:

a. Select **Modular Budget**.

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

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

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

Period 1	Period 2	Period 3	Cumulative		
Period: 07/01/2011 - 06/30/2012					
<b>Direct Costs</b>					
Direct Cost less Consortium F&A:			\$125,000.00		
Consortium F&A:			\$0.00		
<b>Total Direct Costs:</b>			<b>\$125,000.00</b>		
<b>Indirect Costs</b>					
Rate Number	Indirect Cost Type	IDC Rate(%)	IDC Base	Funds Requested(\$)	
1	MTDC	64.0	\$88,398.75	\$56,575.20	<a href="#">Remove</a>
<b>Total Indirect Costs:</b>				<b>\$56,575.20</b>	
<b>Total Funds Requested:</b>				<b>\$181,575.20</b>	
<a href="#">Add Indirect Cost</a>   <a href="#">Sync with Detailed Budget</a>					
<b>Save</b>					

- 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 (\$).

e. Select **Save**

**Save**

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

g. Review the Cumulative screen to confirm totals.

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



## Cost Sharing Distribution

### O. Cost Sharing Distribution (check with your Research Administration office for business process).

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

Budget Totals				
<b>Direct Cost :</b>	\$224,211.75	<b>Indirect Cost :</b>	\$133,895.52	<b>Total Cost :</b> \$358,107.27
<b>Under Recovery :</b>	\$0.00	<b>Cost Share :</b>	\$72,373.50	<b>Period :</b> 07/01/2011 - 06/30/2014

Budget Period	Total Cost Sharing Amount
1	\$42,373.50
2	\$15,000.00
3	\$15,000.00

Cost Sharing Distribution List :				
<a href="#">Add Cost Sharing Distribution</a>				
Fiscal year	Percent	Amount	Source Account	
2012	100	\$42,373.50		<a href="#">Remove</a>
2013	100	\$15,000.00		<a href="#">Remove</a>
2014	100	\$15,000.00		<a href="#">Remove</a>
<span style="border: 1px solid black; padding: 2px 5px;">Save</span>				

This view depicts a single Source Account entered for each fiscal year:

Budget Totals				
<b>Direct Cost :</b>	\$224,211.75	<b>Indirect Cost :</b>	\$133,895.52	<b>Total Cost :</b> \$358,107.27
<b>Under Recovery :</b>	\$0.00	<b>Cost Share :</b>	\$72,373.50	<b>Period :</b> 07/01/2011 - 06/30/2014

Budget Period	Total Cost Sharing Amount
1	\$42,373.50
2	\$15,000.00
3	\$15,000.00

Cost Sharing Distribution List :				
<a href="#">Add Cost Sharing Distribution</a>				
Fiscal year	Percent	Amount	Source Account	
2012	100	\$42,373.50	0000004	<a href="#">Remove</a>
2013	100	\$15,000.00	0000004	<a href="#">Remove</a>
2014	100	\$15,000.00	0000004	<a href="#">Remove</a>
<span style="border: 1px solid black; padding: 2px 5px;">Save</span>				

## Under Recovery Distribution

### P. Under Recovery Distribution (check with your Research Administration office for business process)

- **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** **Save**

Budget Totals					
<b>Direct Cost :</b>	\$224,211.75	<b>Indirect Cost :</b>	\$66,947.76	<b>Total Cost :</b>	\$291,159.51
<b>Under Recovery :</b>	\$75,215.76	<b>Cost Share :</b>	\$64,105.50	<b>Period :</b>	07/01/2011 - 06/30/2014

Budget Period	Under Recovery Amount
1	\$36,555.60
2	\$19,044.41
3	\$19,615.75

**Under Recovery Distribution List :**

**Add Under Recovery Distribution**

Rates	Fiscal year	On Off Campus	Amount	Source Account	
26.00	2007	Off ▼	\$0.00		<a href="#">Remove</a>
32.00	2008	On ▼	\$0.00		<a href="#">Remove</a>

**Save**

Budget Totals					
<b>Direct Cost :</b>	\$224,211.75	<b>Indirect Cost :</b>	\$66,947.76	<b>Total Cost :</b>	\$291,159.51
<b>Under Recovery :</b>	\$75,215.76	<b>Cost Share :</b>	\$64,105.50	<b>Period :</b>	07/01/2011 - 06/30/2014

Budget Period	Under Recovery Amount
1	\$36,555.60
2	\$19,044.41
3	\$19,615.75

**Under Recovery Distribution List :**

**Add Under Recovery Distribution**

Rates	Fiscal year	On Off Campus	Amount	Source Account	
32.00	2012	On ▼	\$36,555.60	00000008	<a href="#">Remove</a>
32.00	2013	On ▼	\$19,044.41	00000008	<a href="#">Remove</a>
32.00	2014	On ▼	\$19,615.75	00000008	<a href="#">Remove</a>

**Save**

## Project Income

### Q. Project Income

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

To enter Project Income in your budget:

#### 1. Select **Project Income**

Project Income Summary			
Period	Income		
Project Income Details			
Period	Income	Description	
<a href="#">Add Project Income</a>			

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

Project Income Summary			
Period	Income		
Project Income Details			
Period	Income	Description	
1	\$0.00		<a href="#">View</a> <a href="#">Remove</a>
<a href="#">Add Project Income</a>			
<a href="#">Save</a>			


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.

# Validate

## R. Perform Budget Validations

New in Release 4.4 is the ability to execute validation rules within a Coeus budget. Validation rules are being developed by O.R.I.S to allow users to manually perform the validations prior to finalizing the budget. These validations will be automatically run, along with proposal validations, when the proposal is submitted to for approval routing. The Budget Validation permits the user to fix budget errors while in the proposal budget.

<a href="#">Return To Proposal</a>	Investigator: Schultz, Ronald Agency/Sponsor: 300865 : NATL INST OF HEALTH Title: salary calc test	Proposal #: 00006425 (In Progress) Proposal Period: 07/01/2011 - 06/30/2012 Version: 6
<a href="#">✓ Budget Versions</a>	<b>Grants Gov Error:</b>	
<a href="#">✓ Budget Summary</a>	 <b>The generated XML application document is not valid against the opportunity</b>	
<a href="#">Print</a>	<b>Please Correct the Following Errors:</b>	
<b>Budget Set Up</b>	<b>PHS398 Modular Budget V1-1</b>	
<a href="#">✓ Personnel &gt;&gt;</a>	You are missing a modular budget.	
<a href="#">Adjust Periods</a>	<b>RR Key Person Expanded V1-2</b>	
<a href="#">✓ Proposal Rates</a>	GrantApplication/Forms/RR Key Person Expanded V1-2/KeyPerson/Profile/BioSketchsAttached The field is empty.	
<b>Validate</b>	<b>RR Other Projects V1-2</b>	
<b>Budget Periods</b>	GrantApplication/Forms/RR Other Projects V1-2/HumanSubjectsSupplement/ExemptionNumbers/ExemptionNumber The value (E8) is not found in the enumeration.	
<a href="#">Personnel Budget</a>	<b>OK</b>	
<a href="#">Equipment</a>		

### 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.

## S. Finalize Your Budget



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

Navigate to the Budget Summary screen.

**Budget Summary : Version 2**

**Budget Status:** Complete ☒ **Final:** ☒ **Modular Budget:** ☒ **Submit Cost Sharing:** ☒

**On/Off Campus:** Default **Total Cost Limit:** \$0.00

**Residual Funds:** \$0.00 **Total Direct Cost Limit:** \$0.00

**OverHead Rate Type:** MTDC **Underrecovery Rate Type:** MTDC

**Comments:** No Subaward + Lab Manager Full Time + PI at 15%.

**Save**

**Budget Totals**

<b>Direct Cost :</b> \$224,211.75	<b>Indirect Cost :</b> \$66,947.76	<b>Total Cost :</b> \$291,159.51
<b>Under Recovery :</b> \$75,215.76	<b>Cost Share :</b> \$64,105.50	<b>Period :</b> 07/01/2011 - 06/30/2014

**Budget Periods**

Period	Start Date	End Date	No. of Months	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	07/01/2011	06/30/2012	12.0	\$103,398.75	\$28,287.60	\$36,555.60	\$34,105.50	\$131,686.35
2	07/01/2012	06/30/2013	12.0	\$59,513.79	\$19,044.41	\$19,044.41	\$15,000.00	\$78,558.20
3	07/01/2013	06/30/2014	12.0	\$61,299.21	\$19,615.75	\$19,615.75	\$15,000.00	\$80,914.96

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**

**Save**

Navigate to [Return to Proposal](#).

[Return To Proposal](#)



**EXERCISE CAUTION WHEN ENTERING TEXT into COEUS:**

**ONLY USE:** letters (uppercase or lowercase A-Z, a-z), numbers (0-9), underscore (\_).

**NEVER USE:**

- Special characters (like: '/', '&', '-', '\*', '%', '#'). These will cause 'fatal' errors in transmission to Grants.gov and potential errors in Coeus validation.
- File names longer than 50 characters.

## 17. Overview - Upload Attachments

- Select **Upload Attachments** screen.

The screenshot shows the 'Upload Attachments' screen in the COEUS system. At the top, there is a header bar with the following information:

Investigator:	Schultz, Ronald	Proposal # :	00008991 (In Progress)
Agency/Sponsor:	300865 : NATL INST OF HEALTH	Proposal Period:	07/01/2011 - 06/30/2014
Title:			

Below the header, there are three tabs: 'Upload Proposal Attachments', 'Upload Personnel Attachments', and 'Upload Institutional Attachments'. The 'Upload Proposal Attachments' tab is selected and highlighted with a red box.

Below the tabs, there is a form for adding a new attachment. The form includes the following fields:

- Attachment Type: A dropdown menu with a blue arrow.
- Description: A text input field.
- File Name: A text input field.
- Complete: A checkbox with a green checkmark.

Below the form, there is a 'Save' button.

Below the 'Save' button, there is a section titled 'List of Proposal Attachments'. This section contains a table with the following columns: 'Attachment Type/File Name/Uploaded Date by Update User', 'Complete', and 'Description'.

Three yellow callout boxes with arrows point to the tabs and the form fields:

- 'Attachments that go to Sponsor' points to the 'Upload Proposal Attachments' tab.
- 'Attachments pertaining to persons' points to the 'Upload Personnel Attachments' tab.
- 'Attachments for JHU approvers' points to the 'Upload Institutional Attachments' tab.

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

<b>Upload Proposal Attachments</b>	These documents or files are required as defined by the sponsor opportunity instructions and their general submission guidelines. Coeus contains a small number of basic Narrative/Attachment Types. However, to display all Types required for Grants.gov submissions, an opportunity <i>must already have been selected</i> in <b>General Info</b> . The Proposal must be connected to Grants.gov.
<b>Upload Personnel Attachments</b>	These are person-specific files (biosketch, current & pending, etc.)
<b>Upload Institutional Attachments</b>	Institutional attachments do not get submitted to the sponsor.



Proposals to be submitted through Grants.gov must be linked to their sponsor's opportunity using the Grants.gov **before** you begin to upload attachments. This linking process imports into your Coeus proposal the form-specific attachment types required by the funding opportunity.



For **Proposal Attachments**: Coeus will filter the narrative types and present only those relevant to your submission.



Though most **Attachment Types** are restricted by sponsors, and by Coeus, to a single use per proposal, several **Types** may be used multiple times, including (but not limited to): Other, Additional\_Key\_Persons, and Additional\_Equipment. When using one **Attachment Type** multiple times, each attachment must contain a unique **Description**.

#### A. Upload Proposal Attachment:

**Result:** The file is added to List of *Proposal Attachments*.

List of Proposal Attachments

Attachment Type/File Name/Uploaded Date by Update User	Complete	Description		
Budget_Justification Budget_Justification.pdf (Uploaded: 08/05/2010 14:44 by Schultz, Ronald)	✓	Budget_Justification	Remove	View

**Upload Proposal Attachments** | Upload Personnel Attachments | Upload Institutional Attachments

**Add Documents**

**Add Documents**

Attachment Type: Budget\_Justification

Description: Budget\_Justification

File Name: Budget\_Justification.pdf

**Complete:** ☒

**Upload New File**

**Save**

List of Proposal Attachments

Attachment Type/File Name/Uploaded Date by Update User	Complete	Description
Budget_Justification Budget_Justification.pdf (Uploaded: 08/05/2010 14:44 by Schultz, Ronald)	✓	Budget_Justification



**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).

## B. Upload Personnel Attachment:

Upload Proposal Attachments **Upload Personnel Attachments** Upload Institutional Attachments

**Add Documents**

Attachment Type:

Person:

Description:

File Name:

**List of Personnel Attachments**

Person	Description	Attachment Type	File Name
Schleicher, Timothy N	Current and Pending	Biosketch	Biosketch
Barrios, Alice, L	Budget Details (NASA ONLY)	Biosketch	Biosketch
Taylor, Robert E	Statement of Commitment (NASA ONLY)	Biosketch	Biosketch
	Other	Biosketch	Biosketch

**Add Documents**

Attachment Type:

Person:

Description:

File Name:

Attachment Type:

Person:

Description:

File Name:

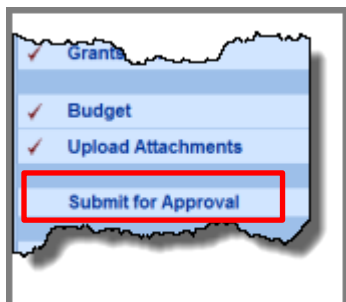


### C. Upload Institutional Attachment:

Attachments not to be sent to sponsor, only viewed by ORA and proposal approvers, should be uploaded under this tab.

The screenshot shows the 'Upload Institutional Attachments' tab selected. Below the tab is the 'Add Documents' section with the following fields: 'Attachment Type' (a dropdown menu showing 'Please Select'), 'Description' (a text area), 'File Name' (a text field with a 'Browse...' button), and 'Complete' (a checkbox with a green checkmark). A 'Save' button is located below these fields. Below the 'Save' button is the 'List of Institutional Attachments' section, which contains a table with columns: 'Attachment Type/File Name/Uploaded Date by Update User', 'Complete', and 'Description'.

### 18. Submit for Approval



**Use Coeus Premium if you want to see the Routing Map for your proposal BEFORE Submit for Approval:**

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

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.
  - Make sure that you complete the PI Certification for each investigator.

## 19. Delete Proposal

Select **Delete Proposal** to initiate deletion of the proposal development record you currently have opened.

- Proposal must be in Status of “**In Progress**” to be deleted.
- This action will permanently delete the entire proposal.



The **Delete Proposal** option only appears in Proposals when you have been assigned the roles of Aggregator or Modify All Dev Proposals.

## 20. Copy Proposal



Proposal copying was designed for speedy response in two submission events:

- 1) Grants.gov ‘Change/Corrected’ resubmits.
- 2) Sending an identical proposal to multiple sponsors.

**Copying for any other purpose can cause you problems. Study these notes carefully.**



To avoid problems in copied proposals, when copying for other purposes:

- 1) ***Immediately*** remove the Grants.gov link – by deleting in the Grants.gov window.
- 2) Do not copy the Budget, if the Project Dates will change.
- 3) Do not copy the Attachments, if the science will change.
- 4) Do not copy the Questionnaires, if the project will change.



If you must copy the Budget:

- 1) ***Immediately*** Sync Budget Rates.
- 2) Consider creating a new Budget Version, rather than editing copied version.
- 3) If you must edit a copied budget Version:
  - a. ***Immediately*** Adjust Budget Periods, boundaries.
  - b. Delete copied Budget Persons who will not be used.



If you must copy the Questionnaires:

- 1) Make sure you have ORIS’s latest Question-set.
- 2) Edit every question to conform to new project requirements.

**Much Proposal Detail is copied automatically**

**Grants.gov link is always copied**

Investigator: Schultz, Ronald      Proposal #: 00041009 (In Progress)  
 Agency/Sponsor: 300865 : NATL INST OF HEALTH      Proposal Period: 07/01/2013 - 06/30/2018  
 Title: Mechanisms of Elevated Fasting Glycemia in Obstructive Sleep ...

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

**Read cautions on preceding page**

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

**Copy Proposal**

## 21. Email: Send Email Notifications from your proposal

Navigate to **Email**

- Select [Add Employee](#) to search for Coeus Users from the SAP HR system.
- Select [Add Non Employee](#) to search the Coeus Rolodex.
- Select [Add Role](#) to select a pre-defined approver on your Routing Map.

**Email Notification**

[Add Employee](#)   [Add Non Employee](#)   [Add Role](#)

To: Seuss, Doctor      [Remove](#)

Subject: Please review and comment on the Narrative files

Message: Doctor Suess:  
 I've uploaded all the files and granted you View access to the Narratives.  
 Please review and comment. I need your input by the end of the week.  
 Thanks!

**Send**

Select **Send**

## 22. Add New Rolodex Entry

The Rolodex is used to maintain Coeus-ready data on collaborators from other universities or research organizations, consultants, etc., for people you want to include in your proposals. Once a Coeus rolodex entry has been created, it stays in the database and is available for quick and easy entry in any proposal.



Rolodex entries cannot be edited once that are used in, linked to, a Coeus proposal development record.

**Enter** the required fields:

The following fields must be completed for Grants.gov submissions:



**ONLY** use letters (uppercase or lowercase A-Z, a-z), numbers (0-9), hyphens (-) and underscore (\_). NEVER use special characters (like '/' or umlaut ü) will cause an error in transmission to Grants.gov.

- Name  
(Last and First),
- Address Line 1  
(street address on the first line; other lines are optional),
- City,
- State,
- Postal Code,
- Country,
- Phone,
- E-Mail.

**Add New Rolodex Person**  
\* Indicates Mandatory Fields

Please enter new rolodex information.

First Name:  Last Name:  Middle Name:   
Suffix:  Prefix:  Title:   
Sponsor:  [Search](#)  
\*Organization:   
Address:   
City:  County:   
State:  Please Select-- Postal Code:   
Country:  Please Select--  
Phone:  Email:  Fax:   
Comments:

Select **Save**

**Save**

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

### Add New Rolodex Person

\* Indicates Mandatory Fields

- Your previous entry has been added to the rolodex. (Rolodex ID was 23102)
- Please enter rolodex information for your next entry.

## 23. Request New Sponsor

Select **Request New Sponsor** to submit a request directly to Sponsored Projects Shared Services for the creation of a new sponsor.

See **Appendix E** for description of this Webform.

## 24. Show Approval Routing

Approval Routing can be viewed **after** Proposal has been submitted for approval, has the Status of Approval In Progress.

### Select Approval Routing

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

Investigator:Schultz, RonaldProposal #:00041924 (Approval In Progress)  
Agency/Sponsor:300865 : NATL INST OF HEALTHProposal Period:09/01/2013 - 08/31/2015  
Title:Radiology yesterday

Department Required for Proposal ApprovalComments and Attachments

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

(SOM) Grants AssociatesHide

	Galea, Alexander J	To be submitted
	Morgan, Suzette F	To be submitted
	Alston-Rodgers, Katrina M	To be submitted
	Brown, Sharel	To be submitted
	Evans, Ashley B	To be submitted
	Rost, Amy B	To be submitted

(17049000) Neurology approval mapHide

	Burrisson, David	Waiting for approval
	Johnson, Nicole	Waiting for approval

Routed by Aggregator:RSCHULT7 2013-02-18 12:57:48.0  
Recalled by Aggregator:

Hierarchy

Hide Legend

Primary Approver  
 Approved by other  
 To be submitted

Alternate Approver  
 In progress  
 Waiting for approval

Approved  
 Passed  
 Delegated

Bypassed  
 Rejected  
 Passed By Other

Recalled

Select [Hierarchy](#) to see the Approval Map Hierarchy view.

Department Required for Proposal ApprovalComments and Attachments

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

Approval Status

Approval Route

(SOM) Grants Associates

Stage 1

Galea, Alexander J  
 Morgan, Suzette F  
 Alston-Rodgers, Katrina M  
 Brown, Sharel  
 Evans, Ashley B  
 Rost, Amy B

(17049000) Neurology approval map

Stage 1

Burrisson, David  
 Johnson, Nicole

Routed by Aggregator:RSCHULT7 2013-02-18 12:57:48.0  
Recalled by Aggregator:

Boxed

CoeusLite Version 4.5.1.

Johns Hopkins University

Page 89



## 25. Examine Grants.Gov Submission Details status

**Grants.Gov**

**Submission Details ( Refresh )**

**Received Date:** 2013-01-03 12:01:10.0  
**Last Modified Date:** 2013-01-03 12:09:08.0  
**Submission Status:** Agency Tracking Number Assigned  
**Grants Tracking Id:** GRANT11295609  
**Agency Tracking Id:** 3552586  
**Notes:** Agency received proposal and assigned tracking id

**Attachments**

- ID-00091626\_BN-1\_BIOSKETCH
- M-15\_PHS\_Career\_SpecificAims
- M-12\_PHS\_Career\_InclusionOfWomenAndMinorities
- M-11\_PHS\_Career\_ProtectionOfHumanSubjects
- M-6\_Narrative
- M-18\_PHS\_Career\_Dev\_Training
- M-20\_PHS\_Career\_Res\_Strategy
- M-22\_PHS\_Career\_Inst\_Commitment
- M-10\_Other
- M-7\_PHS\_Career\_Mentor\_Statements\_Letters
- M-9\_PHS\_Career\_InclusionOfChildren
- M-8\_Budget\_Justification
- M-2\_Equipment
- ID-00016778\_BN-2\_CURRENTPENDING
- M-19\_PHS\_Career\_Training\_Resp\_Conduct\_Research
- M-3\_Facilities
- M-16\_PHS\_Career\_Candidate\_Background

- **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:

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

## Appendix A: What must be completed in Coeus Premium?

### Budgeting

- 1) **Remove Inflation** from a budgeted position while inflating other line items in the budget.
  - a) Example: position under the NIH Salary Cap.
- 2) **Add a senior person TBA position in an NIH Grants.gov submission.** SF 424 does not permit TBA positions in RR Budget Section A, they must appear in Section B. So, the default Faculty Cost Element/Line Item Budget Category of “Senior Personnel” must be changed to “Other Professionals”. Only Premium allows changing cost element budget categories.
- 3) **Proposal Hierarchy**, create or link to Parent - Your proposal requires more than one F&A Rate (IDC Rate).
  - a) Example: K99/R01 Training Grant.
- 4) **Sync Budget by Period** - You know you’ll have a complex budget and need these tools:
  - a) Sync your period costs to a period cost limit.
  - b) Sync your period costs to a direct cost limit.
  - c) Display customizable views of your Coeus budget; e.g. display a cost-sharing column for each line item.
  - d) You prefer to budget by cost element (not by budget category).
  - e) You want to see all expense line items in one screen while budgeting.
  - f) You have predefined, exact personnel cost totals that must appear by category, not by person.
- 5) **Complex list of Participant/Trainee** expense items:
  - a) Example: NSF REU & REI supplements.

### Proposal Development

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



## Appendix B: Tips

### Getting Help for Coeus

To contact your local Coeus help center send an email to [coeus-help@exchange.johnshopkins.edu](mailto:coeus-help@exchange.johnshopkins.edu). In the subject line the Proposal Development records you are working on and whether you are working in Premium or CoeusLite.

### Removing a Lock on Coeus Record:

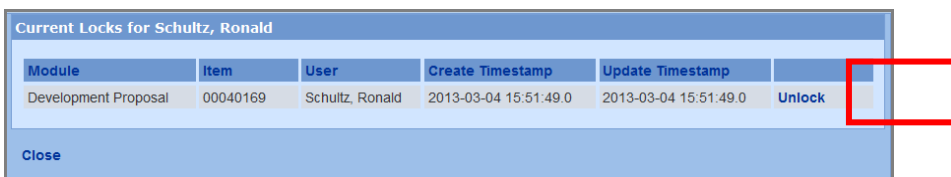
CoeusLite will, by default, open your proposal development record in Edit (Modify Mode). However, if you find that your opened record is uneditable (dropdown menus do not display and data fields are grayed out), then you have been locked out of the Coeus database.

Follow these steps to Remove the lock and resume editing your proposal:

Select “Current Locks” in the CoeusLite header, under your User: Name:



Select “Remove” to the right of your user Name in the Current Locks window:



Select Yes to the question:



Select Proposals In Progress:



Then, re-open your proposal from the Proposal List.

### What “No Special Characters” Mean?

Throughout this guide are warning statements about “no special characters,” meaning that no accented letters (such as ü) or symbols can be used.

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

Uppercase letters: A to Z

Lowercase letters: a to z

Numbers: 0 to 9

Underscore: \_

Hyphen: -

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

## Appendix C: Activity Types

**Activity Type — Required.** Select the appropriate entry from the drop-down list or enter the first characters until the name appears. Refer to the announcement and Divisional policy to determine the **Activity Type**. *The Activity Type you select will determine the initial overhead rate used in your budget.*

Activity Type	Description
<b>Organized Research</b>	<p>Research activities include rigorous inquiry, experimentation or investigation to increase scholarly understanding in the involved discipline. Examples include awards:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> to support research activities</li> <li><input type="checkbox"/> to maintain facilities, equipment and/or operation of a facility to be used for research</li> <li><input type="checkbox"/> for the writing of books, when the purpose is to publish research results</li> <li><input type="checkbox"/> for data collection, evaluation, analysis and/or reporting</li> </ul>
<b>Instruction</b>	<p>Instruction activities include any project where the purpose is to instruct any student at any location. Recipients of instruction may be JHU students or staff, teachers or students in elementary or secondary schools, or the general public. Examples include:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Curriculum development projects, including projects which involve evaluation of curriculum or teaching methods. Note that such evaluation may be considered “research” when the preponderance of activity is data collection, evaluation and reporting</li> <li><input type="checkbox"/> Projects involving JHU students in community service activities for which they are receiving academic credit</li> <li><input type="checkbox"/> Activities funded by awards to departments or schools for the support of students</li> <li><input type="checkbox"/> Fellowship support for pre-doctoral and post-doctoral training activities, including grants funding dissertation work and related travel</li> <li><input type="checkbox"/> Support for writing textbooks or reference books, or creating video or software to be used as instructional materials</li> </ul>
<b>Other Sponsored Activity</b>	<p>Other sponsored activities include programs involving work other than Organized Research, Instruction, or Clinical Research. Most projects in this category do not directly involve students and gain little benefit from libraries, therefore the F&amp;A rate applicable to this category is less than for Research or Instruction. Examples of Other Sponsored Activities include:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Travel grants</li> <li><input type="checkbox"/> Support for conferences, seminars or workshops</li> <li><input type="checkbox"/> Support for University public events such as “lively arts”</li> <li><input type="checkbox"/> Publications by JHU Press</li> <li><input type="checkbox"/> Support for student participation in community service projects which do not result in academic credit</li> <li><input type="checkbox"/> Support for projects pertaining to library collections, acquisitions, bibliographies or cataloging</li> <li><input type="checkbox"/> Programs to enhance institutional resources, including computer enhancements, etc.</li> <li><input type="checkbox"/> Health services projects</li> </ul>
<b>Clinical Research</b>	<p>All for-profit corporation-sponsored research (sponsor or prime sponsor, domestic or foreign) that involves patients or protected health information (PHI), or clinical testing or procedures, or drug/device diagnostic testing in humans or any planning/lab/clinical service in support of such clinical research.</p>

## Appendix D: Request a New Sponsor in SAP

**Shared Services Office**  
Sponsor Request Form

[Search for Existing Sponsor](#) [Webforms Home](#)

**Sponsor Data**

Customer Type: Sponsored

Customer/Sponsor Number: [Text Field]

Customer/Sponsor Name: [Text Field]

Acronym: [Text Field]

Country: [Dropdown]

Street Number: [Text Field]

Street Name: [Text Field]

Building: [Text Field]

Room: [Text Field]

Floor: [Text Field]

City: [Text Field]

State: [Text Field]

Zip Code: [Text Field]

Bank Routing Number: [Text Field]

Bank Account Number: [Text Field]

BP Type: [Dropdown]

Parent Sponsor 1: [Text Field]

Parent Sponsor 2: [Text Field]

Parent Sponsor 3: [Text Field]

Parent Sponsor 4: [Text Field]

Parent Sponsor 5: [Text Field]

Request Sponsor [Reset]

Office of [Text Field]

Before submitting a request, perform a search to ensure the sponsor is not already in SAP. Choose the link in the upper right corner

- Customer Type:** Required – Always select ‘Sponsored’ for this purpose.
- Customer/Sponsor Number:** N/A
- Customer/Sponsor Name:** Required – enter
- Acronym:** Required – enter
- Country:** Required – select
- Street Number:** Required – enter
- Street Name:** Required – enter
- Building:** Optional
- Room:** Optional
- Floor:** Optional
- City:** Required – enter
- State:** Required – enter
- Zip Code:** Required – enter
- Bank Routing Number:** N/A
- Bank Account Number:** N/A
- BP Type:** Required – *Carefully* select Sponsor Type.
- Parent Sponsor 1... 5:** Optional
- Button ‘Request Sponsor’:** Required – select to submit.

This process may require several days. Sponsored Projects Shared Service identifies requestor by JHED ID and notifies them directly once sponsor has been created in SAP. Coeus imports new sponsor within 15 minutes of creation.