Coeus Lite
Proposal Development User Guide

Document Date: April 2017

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	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.
	Caution using the Browser Back button! 1) Because the back button is a Browser History button it **SHOULD NOT BE USED TO NAVIGATE WITHIN** a proposal. Use the Navigation panel. 2) However, if you receive an error message you MUST 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.

CoeusLite Home page

Close CoeusLite

Delete, Unlock, your lock proposal database

Open list of your Proposals.

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.

View all of your proposals

View your active proposals

Start a new proposal

Search for a proposal

Click to resort.

Statuses appearing in this list.

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:

 ***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.

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). 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.

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

Coeus Home	My Negotiations	My Proposals	My COI	My IRB Protocols	My IACUC Protocols	Inbox	My ARRA	Logout

All Proposals | Proposals In Progress | Create New Proposal | Proposal Search | Grants.gov Opportunity Search |

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...
Lead Unit: 17072118 : THORACIC SURGERY
Last Updated: 2012-12-19 15:57:13.0 by Schultz, Ronald

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

Questionnaire
- Research Compliance Questions
- Questions for Grants.gov S2S Forms

- Grants.Gov

- Budget
- Upload Attachments

- Submit for Approval

- Print
- Delete Proposal
- Copy Proposal
- Email
- Add New Rolodex Entry
- ORIS Proposal Summary Form
- Request New Sponsor

General Proposal Information   Budget: ‖   Narrative: ‖
* Indicates Mandatory Fields

*Proposal Type: New   *Activity Type: Organized Research

*Start Date: 09/01/2013   *End Date: 08/31/2018

Original Proposal Number: Search   Award #:   Search

*Agency/Sponsor: Search

Prime Sponsor: Search

Proposal Deadline Date: 02/05/2011   ● Receipt   ○ Postmarked

NSF Science Code: -----------Please Select------------

Anticipated Award Type: Grant

Sponsor Proposal No :

*Title: Network Modeling for Prediction of Response to Combination Targeted Therapeutics

Program Title:

Proposal in Response: Federal Solicitation   Sub Contract: ☑

Funding Opportunity Number: CFDA Number:

Agency Program Code: Agency Div Code:

Save

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

This window has five sections

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.

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	• THORACIC SURGERY • LABORATORY FOR COMPUTATIONAL SENSING AND ROBOTICS	☑		Principal Investigator	Certify ✔
Yang, Stephen C	• THORACIC SURGERY			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
Budget Summary by Period	☐
Cost Sharing Summary by Period	☐
Cumulative Budget	☐
Industrial Budget by Period	☐

iv. Grants.gov Forms Printing

Proposal Print   Hide

Grants.Gov   Hide

Select : All | None

- ☐ RR SF 424 V1-2
- ☐ Performance Site V1-4
- ☐ RR Other Projects V1-3
- ☐ RR Key Person Expanded V1-2
- ☐ RR Budget V1-1
- ☐ RR SubAward Budget 30 V1.2
- ☐ PHS398 Cover Page Supplement V1-4
- ☐ PHS398 Research Plan V1-3
- ☐ PHS398 Checklist V1-3

Print Selected

Sponsor Form Packages   Hide

No Packages Found.

2. General Info screen

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

* Proposal Type	View the entire list of Proposal Types at: http://procoeus.jonhshopkins.edu/orisite/oris_web/oris_index.html Select **User Guides** > #14, 'Proposal Type Decision Guide'.
* Activity Type	Select the appropriate entry from the drop-down list. **Appendix D** provides general definitions for each Activity Type.
* Start Date	Date the project is expected to start. Enter in **mm/dd/yyyy** format or use the calendar tool.
* End Date	Date the project is expected to end. Enter in **mm/dd/yyyy** format or use the calendar tool.
Original Proposal Number	If required, this is the 8-digit Coeus Institute Proposal Number found by using the *Search* link. This field is required if the *Grants.gov Submission Type* is 'Change/Corrected' and may be required with certain *Proposal Types.* Call your Office of Research Administraton.
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 *Search* link. It may be required with certain *Proposal Types.* 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 *Search* 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.

NSF Science Code	Select this code from the drop-down list for all proposals, not just for NSF submissions. Consult your ORA for guidance.
Anticipated Award Type	Select the type from the drop-down list. Consult your ORA for guidance.
Sponsor Proposal No. (number)	Required if the *Proposal Type* is Renewal, Resubmission, Revision, or Continuation. Search the Award module or Institute Proposal module, as appropriate, to find this number.
* Title:	Enter the descriptive title. For electronic submission, the title should not contain any special characters. See What No Special Characters means? The field will support 200 characters, but some sponsors may require shorter titles. Refer to the sponsor instructions.
Program Title:	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.
Proposal in Response to:	Select an entry from the drop-down list to identify how this funding opportunity was announced.
Subcontract	Select this checkbox if one or more subcontracts will be included in proposal budget. If there will be no subcontracts, leave it unchecked.
Funding Opportunity Number	For paper submissions: enter data manually. For Grants.gov submissions: enter data manually, *or* this will be populated automatically if CFDA is used to perform the Grants.gov search.
CFDA Number:	Catalog of Federal Domestic Assistance number assigned by sponsor for funding opportunity. For paper submissions: enter the data manually, if known. For Grants.gov submissions, enter the CFDA number to support the Grants.gov search. *Note:* some NIH opportunities do not assign CFDA numbers until after award. Use the Funding Opportunity search for those applications and leave the CFDA field blank unless it is populated automatically by the selected Grants.gov opportunity.
Agency Program Code:	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'.
Agency Division Code:	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.

1. Select **Save**

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

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.

Proposal Organization	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.
Performing Organization	DO NOT EDIT: The organization performing the main portion of the project. This will likely be the same as the Proposal Organization.
Other Organization/Location	Do Not Select – unless your ORA confirms that the DUNS number is required for another project organization. Then, contact coeus-help@jhu.edu.
Performance Site/ Location	Always Select (unless the DUNS number is required). Use this option to display *Subawardee institutional address* and *JHU Off Campus locations*.

Organization:

Proposal Organization:

Proposal Organization
Address: McKeown MBA, JD Alexandra
Johns Hopkins University
Bloomberg School of Public Health
615 N. Wolfe Street, Suite W1100
Baltimore

Location: Johns Hopkins University
Cong Dist: MD-007
Remove

Add Cong District

Performing Organization:

Performing Organization
Address: Johns Hopkins University
Bloomberg School of Public Health
615 N. Wolfe Street, Suite W1100
Baltimore
MD

Location: Johns Hopkins University
Cong Dist: MD-007
Search
Remove

Add Cong District

Add Organization / Location

Save

1. Click Add Organization /Location to create additional panels.

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 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.

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

> **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:

A. **Principal Investigator & Co-Investigator** MUST BE JHU Employees. Only search using Employee Search Never search for these two Proposal Roles using Non Employee Search

B. **Rationale:** Coeus *will prohibit* submission of any proposal with a Rolodex person shown as either a Principal or Co-Investigator.

C. 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:

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:

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

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

Select Detail button to open Detail window

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 (*).

(*)

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.

'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:	rschult7@johnshopkins.edu
Commons User Name:	rschultz13	Fax:	
Unit:	11556200	Search THEATRE PROGRAM	
Proposal Role:	Principal Investigator	Multi PI ☐	
% Academic Year Effort:	17	% Summer Year Effort:	

Identical Fields, just different labels.

Person Details window has been renamed "Agency Cre...

Person Details

Full Name:	Schultz, Ronald	User Name:	RSCHULT7
Email Address:	rschult7@johnshopkins.edu	Office Phone:	4105168639
Primary Title:	Business Services Analyst	Directory Title:	Business Services Analyst
Home Unit:	10100801	School:	
Agency Credentials:	rschultz13	Fax:	
Pager:		Mobile:	

Division

Add Degree

Degrees

Degree Type	Degree	Graduation Year	School:	
-----------Please Select-----------				Remove

Add Degree

Degree Type	Degree	Graduation Year	
Medical Doctor	MD	2000	Most recent Date will be shown first
Doctor of Public Health (DPH)	DPH	2005	

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'.

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

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

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

C. **How to notify Investigators to complete their own Certification**
   i)   Within the Proposal, in the Investigator/Key Persons window, Select button 'Send Notification'.

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

D. **How a JHU Investigator can complete their Certification**
   i) Investigators, as JHU employees, will instantly receive an email notice list this:

   From: DO_NOT_REPLY@prcoeus.johnshopkins.edu
   To:
   Cc:
   Subject: Please Certify this Proposal...

   Investigator

   Please certify the proposal by clicking on the following link PI :
   Lead Unit :
   Proposal Number : 00042351
   Sponsor:
   Deadline Date:
   Title:
   Sponsor Announcement:

   You have been named as Investigator for the above referenced project.
   Please use the link given below for the project details.
   https://prcoeus.johnshopkins.edu/coeus/proposalPersonsCertify.do?proposalNo=00042351&personId=00018348

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

   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;

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

   Certification for : Schultz, Ronald and Answered By: RSCHULT7 - 12/27/2012 04:53:19
   Proposal Person Certification Questions
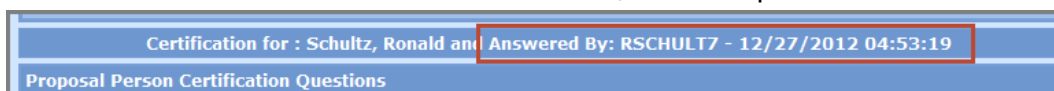
6. *(ignore)* Credit Split

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

7. Special Reviews

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

a. **Click** Special Review drop-down box
b. **Select** Special Review type
c. **Click** Approval drop-down box
d. **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).

e. **Save** the entry.

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

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.

Project Summary   Technical Abstract   ~~Layman Abstract~~   Labs   Clinical
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

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 (*)   D
                                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

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).

1. Click on Select to choose this opportunity and retrieve the submission requirements:

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

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

4. 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

[Save] [Submit to Grants.gov]

5. Other Grants.gov screen functions:

Only after connected to Grants.gov

Ignore

Will remove Grants.gov connection and data entered by that connection.

Runs some of the G.G validations on selected forms.

Generates printable PDFs of selected forms.

Refresh | Select Another Opportunity | Delete Opportunity | Validate | Print Selected Forms

[Save] [Submit to Grants.gov]

Always Save.

Not active until proposal is approved.

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:

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:

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

(*) See next page picture for Proposal Print screenshots…
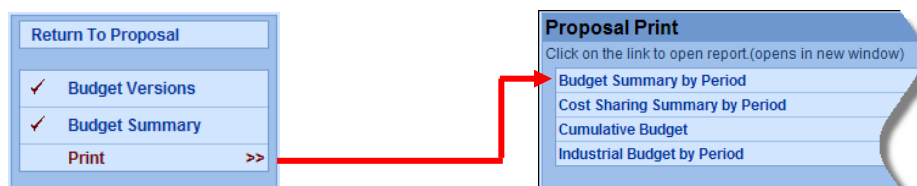
(new) Budget Summary box is editable, when no detailed budget is built in Coeus.

⚠️	**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	
✓	Personnel
	Adjust Periods
✓	Proposal Rates

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)

Coeus-recommends an Appointment Type and Job Code which you may Save or select and enter alternate data.

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:

- **Select Add Employee** to search the Johns Hopkins employees or select **Add Non Employee** to search the Rolodex.

- **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.

- **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):
  - o **Select Add TBA**
  - o **Select** on the appropriate category displayed in the **TBA Persons** window.
  - o **Save** [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 Assist...	

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		Remove	Base Salary by Period
Schultz, Ronald	U0151	12M EMPLOYEE	04/01/2014	$75,000.00		Remove	Base Salary by Period
Statistician	U0161	12M EMPLOYEE	04/01/2014	$55,000.00		Remove	Base Salary by Period

Add Employee | Add Non Employee | **Add TBA** | Calculate All Base Sal

[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:

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

7. **Enter Anniv Date**: Enter the person's <u>salary</u> 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 1st 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

Base Salary by Period	
Period	**Base Salary**
1	$0.00
2	$0.00
3	$0.00
4	$0.00
5	$0.00
Save	Calculate	Close

Select Save

Base Salary by Period	
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**.

.

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: Incomplete	Final: ☐ Modular Budget: ☐
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:	

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   No. of Months :18.0

Under Recovery :$0.00   Cost Share :$0.00   Period :07/01/2011 - 12/31/2012

Personnel Budget

Name Schultz, Ronald	Salary Type SALARY - FACULTY FT/PT	Edit | Remove
Period Calendar	%Charged 5.00	%Effort 5.00
Start Date: 07/01/2011	End Date: 12/31/2012	Months 0.9
Requested Salary($) $8,437.51	Fringe Benefit($) $2,742.19	Funds Requested($) $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		07/01/200?		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	2014			3.0
Students (7/1)		2013	01/2012	3.0	
Students (7/1)	On	201?	07/01/2012	3.0	3.0
Students (7/1)	Off	20??	07/01/2013	3.0	3.0
Students (7/1)	On	20?4	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

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
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**

Type
--------------------Please Select------------- ∨

Cost, depicted as: .

Personnel Budget

E. Personnel Budget

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

1. Select **Add Person** to add the personnel to be included in the budget from the pick-list of personnel previously added in the **Budget Set Up > Personnel** screen.

   - Select the checkboxes to the left of the names of all the personnel required for the Period 1 budget. You can also select the single checkbox at the top of the list to Select All.

   - Select **Save**.

.

You do not need to use all the **Budget Personnel** displayed. If they are not selected in the Add Person process, they will have no impact on your budget. 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

(*) 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:

- **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:
  - o **Academic:** The 9-month academic year: September 1 through May 31.
  - o **Calendar:** The 12-month calendar year.
  - o **Cycle:** Same as Calendar, 12 month project period.
  - o **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.**

  - o Equal amounts mean the entire expense will be paid by the sponsor.
  - o **% 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.

3. Enter Personnel Line Item Details

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

Line Item Details window:

   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:

- o Personnel Line Item Detail window is grayed out and uneditable – from this window.
- o 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.

1. **Select Add Equipment** to add individual items of equipment to the budget.
   - Select a **Type** from the drop-down menu.
     o 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.**

2. Enter Equipment **Line Item Details**

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

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

- o **Description**: Change the line item description as needed.

- o **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.

- o **Quantity:** Enter if relevant or required based on the sponsor instructions.

- o **Cost**: Change as needed. You will see the updated amount back on the main **Equipment** screen.

- o **Cost Sharing**: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.

- o **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.

- o **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
  - o 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.

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

- o *Description*: Change the line item description as needed.

- o *Start Date* and *End Date*: Change if relevant or required based on the sponsor instructions.

- o *Quantity:* Enter if relevant or required based on sponsor instructions.

- o *Cost*: Change as needed. You will see the updated amount back on the main **Travel** screen.

- o *Cost Sharing*: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.

- o *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.

- o *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.

- o *Rate Types / Apply:* Select and deselect the *Apply* checkboxes as needed

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

- o **Underrecovery**

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

If you've made any edits, select:

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

- o **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.

  o 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** .

Results after entry:

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.

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

- o *Description*: Change the line item description as needed.

- o *Start Date* and *End Date*: Change if relevant or required based on the sponsor instructions.

- o *Quantity:* Enter if relevant or required based on sponsor instructions.

- o *Cost*: Change as needed. You will see the changes on the main **Participant/Trainee** screen.

- o *Cost Sharing*: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.

- o *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.

- o *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.

- o *Rate Types / Apply:* Select and deselect the *Apply* checkboxes as needed.

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

- o **Underrecovery**

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

If you've made any edits, select:

- o **Save and Apply to Current Period,** or

- o **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

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

Budget Other Direct Costs

Type	Description	Funds Requested ($)		
--------------------Please Select------------ ∨		$0.00	Edit	Remove

	Total Other Direct Costs	$0.00

Add Direct Costs | Calculate

Save

Results after entries:

b. Enter Direct Cost **Line Item Details**

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

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

- o *Description*: Change the line item description as needed.

- o *Start Date* and *End Date*: Change if relevant or required based on the sponsor instructions.

- o *Quantity:* Enter if relevant or required based on sponsor instructions.

- o *Cost*: Change as needed. You will see the changes on the main **Other Direct Costs** screen.

- o *Cost Sharing*: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.

- o *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.

- o *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.

- o *Rate Types / Apply:* Select and deselect the **Apply** checkboxes as needed.

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

- o **Underrecovery**

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

If you've made any edits, select:

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

- o **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

- o **Save and Apply to Current Period** or

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

- o **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.

Result after entry:

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.

Result of unchecked Apply MTDC Rate:

Line Item Details

Save and Apply to Current Period   **Save and Apply to Current and Later Periods**   **Close**

Description:	Domestic meeting: PI attendance required	
Start Date: 01/01/2009	**End Date:** 12/31/2009	**Quantity:** 0
Cost: $1,850.00	**Cost Sharing:** $0.00	**Underrecovery:** $1,258.00
Apply Inflation: ☑	**On Campus:** ☑	

Rates Applicable to the Line Item

Rate Types	Apply	Cost	Cost Sharing
MTDC	☐	$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.

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 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
Total exclusions from F&A base	$39,000

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

Total exclusions from Allocated Expense base	$0

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   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

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.

(9) View: full Upload history.

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

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

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

(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 for guidance.

Budget Summary

L. Budget Summary Screen

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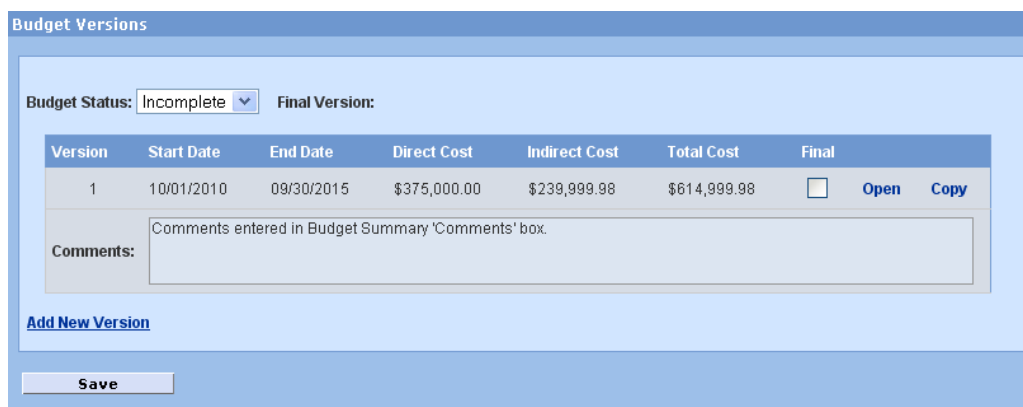
Once you have completed your changes to this screen, Select **Save** [Save] .

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.

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	☐	Open	Copy
Comments:	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	☑	Open	Copy
Comments:	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.

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**

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

The page at http://trcoeus.johnshopkins.edu s...

? Are you sure you want to sync the budget modular ?

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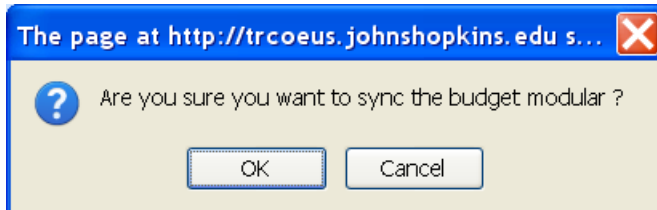
- Review the data defaulted in *each* of the Period tabs.
  - o If the estimated costs are not accurate, edit the entry in the *Direct Cost less Consortium F&A* field to reflect the appropriate number of $25,000 modules. Also, you may need to edit the entries for IDC Base and Funds requested to match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

Period 1	Period 2	Period 3	Cumulative

Period: 07/01/2011 - 06/30/2012

Direct Costs

Direct Cost less Consortium F&A:	$125,000.00
Consortium F&A:	$0.00
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	Remove
		Total Indirect Costs:		$56,575.20	
		Total Funds Requested:		$181,575.20	

Add Indirect Cost | Sync with Detailed Budget

Save

d. **Select Save**   Save

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

For Period 1:

a. **Select Modular Budget.**

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

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

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

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

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.

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 exits, 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.

o **Enter** a Fiscal Year, Percent (optional), Amount, and Source Account Code.

▪ Use **Remove** to delete an unnecessary entry line.

▪ **Select** Save [Save]

Budget Totals					
Direct Cost :	$224,211.75	Indirect Cost :	$133,895.52	Total Cost :	$358,107.27
Under Recovery :	$0.00	Cost Share :	$72,373.50	Period :	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 :
Add Cost Sharing Distribution

Fiscal year	Percent	Amount	Source Account	
2012	100	$42,373.50		Remove
2013	100	$15,000.00		Remove
2014	100	$15,000.00		Remove
Save				

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

Budget Totals					
Direct Cost :	$224,211.75	Indirect Cost :	$133,895.52	Total Cost :	$358,107.27
Under Recovery :	$0.00	Cost Share :	$72,373.50	Period :	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 :
Add Cost Sharing Distribution

Fiscal year	Percent	Amount	Source Account	
2012	100	$42,373.50	0000004	Remove
2013	100	$15,000.00	0000004	Remove
2014	100	$15,000.00	0000004	Remove
Save				

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 exits, 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

Direct Cost :	$224,211.75	Indirect Cost :	$66,947.76	Total Cost :	$291,159.51
Under Recovery :	$75,215.76	Cost Share :	$64,105.50	Period :	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		Remove
32.00	2008	On ▾	$0.00		Remove

⬛ Save

Budget Totals

Direct Cost :	$224,211.75	Indirect Cost :	$66,947.76	Total Cost :	$291,159.51
Under Recovery :	$75,215.76	Cost Share :	$64,105.50	Period :	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	Remove
32.00	2013	On ▾	$19,044.41	00000008	Remove
32.00	2014	On ▾	$19,615.75	00000008	Remove

⬛ 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			
Add Project Income					

2. **Select Add Project Income.**

Project Income Summary	
Period	Income

Project Income Details					
Period	Income	Description			
1 ▼	$0.00			View	Remove
Add Project Income					

Save

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

4. **Enter** the *Income* funds**.**

5. **Enter** a *Description.*

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

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

8. **Select Save** **Save** .

Repeat for each period with Project Income to report**.**

Validate

R. Perform Budget Validations

New in Release 4.4 is the ability to execute validations 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.

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.

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.**

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

Upload Proposal Attachments	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 *must already have been* selected in **General Info**. The Proposal must be connected to Grants.gov.
Upload Personnel Attachments	These are person-specific files (biosketch, current & pending, etc.)
Upload Institutional Attachments	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.*

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:

C. Upload Institutional Attachment:

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

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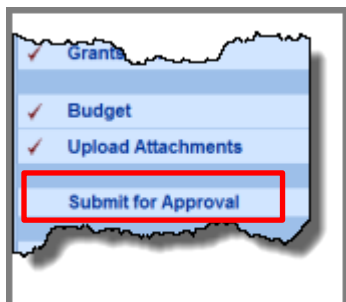
Use Coeus Premium if you want to see the Routing Map for your proposal *BEFORE* **Submit for Approval:**

- 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:
    - o Mark your budget as **Final** and **Complete** on the **Budget Summary** screen
    - o Navigate to the **Grants.gov** screen and select **Validate**;
        - ▪ Respond to any errors displayed – make the necessary corrections.
    - o 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 ...

GRANTS.GOV™

☐ 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*.

Select Save

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

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.

Select Hierarchy to see the Approval Map Hierarchy view.

25. Examine Grants.Gov Submission Details status

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

Items on this screen:

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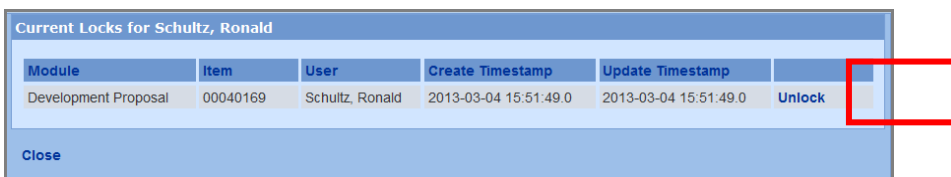
Select Yes to the question:

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
Organized Research	Research activities include rigorous inquiry, experimentation or investigation to increase scholarly understanding in the involved discipline. Examples include awards: ☐ to support research activities ☐ to maintain facilities, equipment and/or operation of a facility to be used for research ☐ for the writing of books, when the purpose is to publish research results ☐ for data collection, evaluation, analysis and/or reporting
Instruction	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: ☐ 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 ☐ Projects involving JHU students in community service activities for which they are receiving academic credit ☐ Activities funded by awards to departments or schools for the support of students ☐ Fellowship support for pre-doctoral and post-doctoral training activities, including grants funding dissertation work and related travel ☐ Support for writing textbooks or reference books, or creating video or software to be used as instructional materials
Other Sponsored Activity	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&A rate applicable to this category is less than for Research or Instruction. Examples of Other Sponsored Activities include: ☐ Travel grants ☐ Support for conferences, seminars or workshops ☐ Support for University public events such as "lively arts" ☐ Publications by JHU Press ☐ Support for student participation in community service projects which do not result in academic credit ☐ Support for projects pertaining to library collections, acquisitions, bibliographies or cataloging ☐ Programs to enhance institutional resources, including computer enhancements, etc. ☐ Health services projects
Clinical Research	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.

Appendix D: Request a New Sponsor in SAP

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.