Coeus Lite Proposal Development **Training Exercise Guide**

Fall 2018

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General Proposal Information Fields

| General Proposal Information Indicates Mandatory Fields | | | Budget: 💥 Narrative: 💥 | |
|---------------------------------------------------------|---------------|-----------------|--------------------------------------|---|
| | Please Select | $\mathbf{\vee}$ | 2 *Activity Type:Please Select | 7 |
| 3*Start Date: | | | 4 *End Date: | |
| 5 Original Proposal Number: | Search | | 6 Award #: Search | |
| 7*Agency/Sponsor: | Search | | | |
| 8 Prime Sponsor: | Search | | | |
| 9 Proposal Deadline Date: | | | (93) Receipt O Postmarked | |
| 10 NSF Science Code: | Please Select | ~ | | |
| 11 Anticipated Award Type | Please Select | ~ | | |
| 12 Sponsor Proposal No : | | | | |
| (13)*Title: | | | 0 | |
| (14) Program Title: | | | | |
| | Please Select | $\mathbf{\vee}$ | (16) Sub Contract: | |
| | | • | 18 CFDA Number: | |
| (17) Funding Opportunity Number: | | | | |
| (19) Agency Program Code: | | | 20) Agency Div Code: | |
| (21) Agency Routing Identifier: | | | 22) Previous Grants.gov Tracking ID: | |
| Save | | | | |

- 1. **Proposal Types:** Select the appropriate entry from the drop-down list. This information might be specified in the sponsor's announcement or guidelines.
 - a. Budget Revision NOT IN USE: Used when a proposal has been submitted to the sponsor and the actual award is greater than or less than the original budget approved in Coeus, or when a sponsor requests a budget revision to a previously submitted application.
 - b. Continuation (Non-Competing Renewal) NOT IN USE: Progress report submitted to receive an increment of funding from a previously awarded amount.
 - c. Internal: A proposal that will be submitted to Drexel for potential funding.
 - d. Internal CURE Tobacco: Internal proposals that will be submitted for CURE funding.
 - e. New: Application submitted for funding for the first time.
 - f. Pre-Proposals: Coeus is only required if;
 - i. A detailed rather than summary budget is required.
 - ii. The number of pre-proposals allowed from the University is limited.
 - iii. The pre-proposal commits the University to cost sharing of any kind.
 - iv. An authored signatory is required.
 - g. Recurring Contract: Currently not in use by ORA.
 - h. **Renewal (Competing):** Project for which previous years of funding have elapsed. Renewals request additional funding to continue previously awarded projects through either an announced open competition, or closed competition with no guarantee of funding.
 - i. **Resubmission:** An application that has been previously submitted by not funded and is being resubmitted for consideration.
 - j. **Revision:** Used for grants.gov proposals to request an increase/decrease in award or to request an increase/decrease in the duration of the award. Only used for current awards.
 - k. **Transfer-In:** For Investigators who are bringing funding with them from a previous institution.
 - I. Void: Do not use except at Program Administrator behest.

- 2. Activity Type: Select the appropriate entry from the drop-down list
 - a. Organized Research
 - i. **Sponsored Research:** Research activities that are separately budgeted and account for and sponsored by federal non-federal agencies and organizations (state, local government, or private sector).
 - ii. **University Research:** Research and development activities that are separately budgeted and accounted for by Drexel University under and internal application of funds.
 - iii. **Sponsored Research Training:** Research activities involving the training of individuals in research techniques, which are sponsored by federal and non-federal agencies and organizations and where such activities share the same facilities as other research and development activities. Most common type of awards are "K", "T", or "F" projects awarded by the federal government. F&A Rate should be as negotiated unless as stipulated by sponsor.
 - b. **Instruction** (will be labeled as such in solicitation): Covers teaching and training activities, including course preparation, classroom instruction, study areas for students, academic advising of students by faculty members and any other activities that involve credit.
 - i. **Department Research:** This includes research and development activities that are <u>not</u> sponsored and are <u>not</u> separately budgeted and accounted for by Drexel. Funding source is normally the departmental operating budget or other University sources.
 - ii. **Other Sponsored Training:** Includes instructional or training activities (other than research training) established by grant, contract or other cooperative agreement.
 - c. **Fellowship:** Fellowship support for pre-doctoral and post-doctoral training activities, including grants funding dissertation work and related travel.
 - d. **Public Services:** Provides support for the purpose of organizing, establishing, providing or enhancing the delivery of services to a particular community or non-University audience.
 - e. Other Sponsored Projects: Sponsored programs and projects financed by federal and nonfederal agencies and organizations which involve the performance of work other than instruction and organized research. Examples may include health service projects, clinical trials, demonstration activities, travel grants, seminars and conferences, database construction and data collection, data dissemination, community services and education programs.
 - f. **Clinical Research:** A special category of activity that combines research with the testing of practical applications in biomedicine. Clinical trials/studies are generally funded by commercial sponsors (often pharmaceutical companies) seeking approval of new pharmaceutical products or treatments, including drugs and investigational devices. F&A Rate should be as negotiated unless as stipulated by sponsor.
 - g. **Equipment:** Programs assisting in the acquisition, development, maintenance, and/or technical support of major research instrumentation that is, in general, too costly for individual support. Awards may be for a single instrument, a large system of instruments, or multiple instruments that share a common research focus.
- 3. **Start Date:** Enter the date the project is expected to start. Refer to the sponsor's announcement or guidelines for acceptable dates.
- 4. End Date: Date the project is expected to end
- 5. **Original Proposal Number:** Used to link to an original proposal if you are doing a Continuation, Renewal, Resubmission, or budget revision
- 6. Award #: Used with Non-Competing Continuations, Recurring Contracts Renewals, or Revisions. Use the search to link it to your existing award, if applicable.
- 7. **Agency/Sponsor:** The sponsor is the organization that will provide funding *specify which subagency if applicable i.e. National Institute of Caner Not NIH*
- 8. **Prime Sponsor:** If Drexel will be the subcontractor for the proposal, the prime sponsor is the agency providing funds to your sponsor. If not, leave this field blank. If sponsor is subagency do not put the agency as the prime.

- 9. Proposal Deadline Date: Date the proposal is due
 - a. Select the option that defines the deadline receipt requirement
- 10. **NSF Science Code:** Only to be filled out if NSF is the sponsor. Use the drop-down menu to choose the closest option.
- 11. Anticipated Award Type: Select the type from the drop-down list, if known
- 12. Sponsor Proposal No.: Required if the Proposal Type is Renewal, Resubmission, Revision, or Continuation
- 13. Title: Enter the descriptive title
- 14. Program Title: If there is Program Title, it should be listed at the top of the Solicitation
- **15. Proposal in Response:** Select an entry from the drop-down list to identify how this funding opportunity was announced
- **16. Subcontract Checkbox:** Select this checkbox if Drexel University will issue one or more subcontracts for this proposal. If there will be no subcontracts, leave it unchecked.
- 17. Funding Opportunity Number (for Federal Solicitations): A number assigned by a federal agency to distinguish one funding opportunity from another (most often in 12-345 format)
- 18. **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. See https://nsf.gov/bfa/dias/policy/cfda.jsp.
- 19. Agency Program Code: This code is currently required only for NSF Grants.gov submissions. See https://www.fastlane.nsf.gov/pgmannounce.jsp.
- 20. Agency Div Code: This code is currently required only for NSF Grants.gov submissions. See https://www.fastlane.nsf.gov/pgmannounce.jsp.
- 21. Agency Routing Identifier: A science area designation specified in some solicitations. Skip the "Agency Routing Identifier" field unless otherwise specified in the FOA (not used by NIH or other PHS agencies).
- 22. **Previous Grants.gov tracking ID:** This field is required if there is a change or correction to a previously submitted application that had already been assigned an ID.

Exercise 1: Create a New Proposal

Enter as much information as possible, be sure to complete the required fields on the General Info tab, marked by * and the date that the proposal is due to the sponsor.

| Coeus Home My Negotiations My F | Propos | als My Awards | My COI | My IRB Protocols My | IACUC Pro | otocols | Inbox | My ARRA | Logout | | | |
|---------------------------------|--------|-----------------------|---------------------|-----------------------|-----------|------------|-----------------|-------------|-------------------|----------------|--------------------|-------------------------------|
| | | | All Prop | osals Proposals V | aiting fo | r Approval | Proposals | In Progress | Create New | Proposal | Proposal Search | Grants.gov Opportunity Search |
| Proposal Summary | | General Proposal Info | | | | | | | | | Budget: 🔀 | Narrative: 🗙 |
| General Info | >> | Indicates Mandatory F | Fields | | | | | | | | | |
| Organization | _ | | *Proposal Type: | New | | \sim | | | *A | Activity Type: | Organized Research | ~ |
| Investigators/Key Persons | | | *Start Date: | 07/01/2018 | | | | | | *End Date: | 06/30/2023 | |
| Credit Split | | Original P | roposal Number: | | Search | | | | | Award #: | | Search |
| Special Review | | 0 | | | | N | | | | /mara // | L | |
| Abstract | | -1 | Agency/Sponsor: | 001108 | Search | Nauonai II | nstitute of Men | ital Health | | | | |
| Science Code | | | Prime Sponsor: | | Search | | | | | | | |
| Others | | Propos | al Deadline Date: | 10/05/2017 | | | | | | Receipt | O Postmarked | |
| YNQ | | NS | SF Science Code: | Please Sele | | ~ ~ | | | | - | | |
| Proposal Roles | | | | L | CI | | | | | | | |
| Questionnaire | | Anticip | ated Award Type | Grant | | ~ | | | | | | |
| Solicitation Information | | Spons | sor Proposal No : | | | | | | | | | |
| Export Controls | | | | Amyloidosis in Zebrat | ish | | | | | | ~ | |
| ORA Supplement | | | *Title: | | | | | | | | \sim | |
| | | | | | | | | | | | ~ | |
| Grants.Gov | | | Program Title: | | | | | | | | V | |
| User Attached S2S Forms | | Propo | sal in Response: | Please Sele | ct | | | | s | ub Contract: | | |
| Budget | | Funding Opp | ortunity Number: | | | | | | CF | DA Number: | | |
| Upload Attachments | | • • • • | | | | | | | | | | |
| oproud Attachments | | | y Program Code: | | | | | | | cy Div Code: | | |
| Submit for Approval | | Agency R | touting Identifier: | | | | | Pre | evious Grants.gov | Tracking ID: | | |
| | | Save | | | | | | | | | | |

Click on My Proposals and then Create New Proposal. Select the unit under which your proposal will be created. (If your unit is not listed, please contact <u>Coeus-Help@drexel.edu</u>.) You will then automatically land in the General Info tab.

| Ac | tion | Exercise Example |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Choose the <u>proposal type</u> from the drop- down list | Select New |
| 2. | Use the drop-down list to choose an <u>activity</u> <u>type</u> | Organized Research |
| 3. | Enter <u>start date</u> of the proposal by manually entering MM/DD/YYYY or click the calendar button | 07/01/2018 |
| 4. | Enter <u>end date</u> of the entire proposal in the same way as start date | 06/30/2023 |
| 5. | Use <u>Search</u> to find the <u>agency/sponsor</u> code | NIMH (search broadly by typing * in a search field), for example: search NIMH* in the Acronym field the Search pop-up window |
| 6. | Enter the date that the proposal is due to the sponsor in the <u>proposal deadline</u> field; use the MM/DD/YYYY format. Choose the appropriate radial of required submission due by either <u>receipt or postmark</u> | 10/05/2017Receipt |
| 7. | Select the anticipated award type | Select Grant |
| 8. | Enter the <u>title</u> of the proposal, as it should appear in the submission to sponsor | Enter any title you prefer |

| 9. <u>Save</u> the proposal for a proposal development number to be created. Then you can return to this in process proposal at any time. | Click Save |
|-------------------------------------------------------------------------------------------------------------------------------------------|------------|
|-------------------------------------------------------------------------------------------------------------------------------------------|------------|

Exercise 2: Review Organization Tab

The Organization tab is automatically populated with Drexel University's standard information. If the proposal includes work at an off-campus location, add a new site. If the proposal includes a Subcontract, add a new organization using Add Organization/Location.

| Add Organization / Location | | - |
|----------------------------------------|----------|-------------------|
| Type:Please Select Type: | Remove | Location: |
| Address:Please Select | È 📃 | Cong Dist: |
| Other Organization Performance Site | | |
| | | |
| | V | |
| Find Address Remove Address | | Add Cong District |
| Save | | |

| Action | Exercise Example |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Add a Subcontractor site | Click Add Organization/Location Choose Other Organization from drop-down menu |
| 2. Find the Organization by searching | Next to "Location" click Search Click in the name field and type Carn* From results, click on the name; Carnegie Mellon |
| 3. Save Progress | Save |

Exercise 3: Add Key Personnel

Under the Key Personnel tab, add the Principal Investigator (PI) for the project, as well as any Key Study Persons, including Subcontractors.

| | Proposal Summary | Investigator: Agency/Sponsor: | Morey, Ret | | stitute of Mental Health | | Proposal # : Proposal Per | | 7 (In Progress) 18 - 06/30/2023 | | | | | |
|---|------------------------------|-------------------------------------------------------------------|------------------------------------------------------------------------------|-------------|--------------------------|-----|------------------------------|-----------------------|------------------------------------|--|--|--|--|--|
| 4 | General Info | Title: | Amyloidosi | | | | Proposal Per | 10 0. 07/01/20 | 10 - 00/30/2023 | | | | | |
| 4 | Organization | Investigators / Koy S | tudy Personnel Details | | | | | | | | | | | |
| 4 | Investigators/Key Persons >> | Investigator/Key Study Person Unit is required for Investigato | nnel Name is a searchable field | , it cannot | be entered. | | | | | | | | | |
| 4 | Credit Split | | is required to intrestigators. Person Role is required for Key Personnel. | | | | | | | | | | | |
| | Special Review | Employee Search Non | Employee Search | | | | | | | | | | | |
| | Abstract | Name: | | | Email: | | Phone: | | | | | | | |
| | Science Code | Agency Credentials: | | _ | Fax: | | Mobile: | | | | | | | |
| | Others | Unit: | | Searc | | | | | | | | | | |
| | YNQ | | oo intooligatoi | ~ | Multi Pl | | _ | 0.0 | | | | | | |
| 1 | Proposal Roles | % Academic Year Effort: | 0.0 | | % Summer Year Effort | 0.0 | % Calendar Year Effort | 0.0 | | | | | | |
| Ý | estionnaire | Save | | | | | | | | | | | | |

| Ac | tion | Exercise Example |
|----|----------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|
| 1. | Click Employee Search to find and add the Drexel Employee who will be PI | Find your name |
| 2. | Each person must have an email, and phone number. This information is auto-populated from HRIS. | Review to determine if changes are needed |
| 3. | Enter the effort put forth on this project. Divide the number of months working on a project by number of possible months. | Example: Summer Salary 33.33% |
| 4. | Save work and the information moves to a list below | Click Save |
| 5. | Follow steps above to add a Co-Investigator | Employee Search for a co-worker |

| Investigators/Key Study Personnel Details | | | | | | | | | | | | |
|-------------------------------------------|------------------------------------------------------------------------------------|----------|--------------|-------------|-----|--------|----------|-----------|--------|------------|-------------|---------|
| | Investigator/Key Study Personnel Name is a searchable field, it cannot be entered. | | | | | | | | | | | |
| Unit is required for Investigat | | | | | | | | | | | | |
| Key Person Role is required | | | | | | | | | | | | |
| Employee Search Non | Employee Search | | | | | | | | | | | |
| Name: | | Email: | | | | Phone | | | | | | |
| Agency Credentials: | | Fax: | | | | Mobile | : | | | |] | |
| Unit: | | Search | | | | | | | | | | |
| Proposal Role: | Co-Investigator 🗸 | Multi PI | | | | % Effo | rt: | | 0.0 | | | |
| % Academic Year Effort | 0.0 | % Summer | Year Effort: | 0.0 | | % Cale | ndar Yea | r Effort: | 0.0 | | | |
| Save | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| List of Investigators | /Key Study Personnel | | | | | | | | | COI Disclo | sure Status | |
| Name | Department | LU MPI | Role | | | % E | ffort | | | | | |
| | | | | | | | | | | | | |
| Morey, Rebecca I | University | Ľ | Principal Ir | nvestigator | 0.0 | 0.0 | 33.33 | 0.0 | Remove | Certify | × | Details |
| | Research Administration | n | | | | | | | | | | |

Clicking on the person's name in the List of Investigators/Key Study Personnel will allow you to make any later changes to their contact, role, and effort information.

Modify Person Details

Update the PI's degree information and review the address details for accuracy.

| List of Investigators/Key Study Personnel COI Disclosure Status | | | | | | | | | | | |
|-----------------------------------------------------------------|-----------------------------------------------------------------|----|------------------------|-----|----------|-------------|-----|--------|---------|---|---------|
| Name | Department | LU | MPI Role | т | % E A | Effort S | с | | | | |
| Morey, Rebecca I | University Research Administration | Ľ | Principal Investigator | 0.0 | 0.0 | 33.33 | 0.0 | Remove | Certify | × | Details |

Click Details to access the screen for Person Details:

| Person De | tails for Morey, Reb | ecca I | | | | | Return to Investigator |
|------------|----------------------|----------------------------|----------------------|---------|-----------------|--------|------------------------|
| 🗏 Unit C | Details | | | | | | |
| | Unit Number | Unit Name | | | | | |
| | 000001 | University | | | | Search | Remove |
| | 3801 | Research Administration | 1 | | | Search | Remove |
| Add Unit | | | | | | | |
| E Perso | n Details | | | | | | |
| F | | Mana Bahasa I | U N | | DIN 100 | | |
| Full Name | | Morey, Rebecca I | User Name: | | RIM26 | | |
| Email Add | iress: | rebecca.i.morey@drexel.edu | Office Phone: | | (215) 895-2391 | | |
| Primary T | itle: | Systems Analyst | Directory Title: | | Systems Analyst | | |
| Home Uni | it: | 3801 | School: | | | | |
| Agency C | redentials: | | Fax: | | | | |
| Pager: | | | Mobile: | | | | |
| Office Loo | cation: | Drexel University | Sec.Office Location: | | | | |
| Address L | ine 1: | | Address Line 2: | | | | |
| Address L | ine 3: | | City: | | | | |
| County: | | | State/Province: | | Alabama | ~ | |
| Postal Co | de: | | Country: | | United States | ~ | |
| Division: | | Office of Research | | | | | |
| 🗏 Degre | es | | | | | | |
| Degree Ty | уре | Degree | Graduation Year | School: | | | |
| Add Degre | ee | | | | | | |
| Sa | ve | | | | | | |

| Ac | tion | Exercise Example | | |
|-------------------------------|----------------------------------------------------------------------|-----------------------------------------|--|--|
| 1. | Review information from HRIS for accuracy | Review, make any needed changes | | |
| 2. | Address Line 1: must be a location and not a department/ office name | Review, make any needed changes | | |
| 3. | Click add degree to add each needed degree | Click Add Degree | | |
| 4. Add the <u>degree type</u> | | Use the drop-down list to choose Doctor | | |
| | | of Science | | |
| 5. | Enter degree abbreviation into <u>degree</u> field | PhD | | |
| 6. | Type graduation year into field | 2011 | | |
| 7. | Type <u>school</u> name | Drexel University | | |
| 8. | Click Save | • Save | | |
| | Click Return to Investigator | • Return to Investigator (top right) | | |

Certify Investigators

All Investigators, both Principal and Co Investigators, must certify the proposal by answering a series of relevant questions. You can navigate to Certify by clicking Certify next to the name of the personnel in the List of Investigators/Key Study Personnel:

| List of Investigators/Key Study Personnel | | | | | | COI Disclos | ure Status | | | | | |
|-------------------------------------------|-----------------------------------------------------------------|----|-----|------------------------|-----|-------------|-------------|-----|--------|---------|---|---------|
| Name | Department | LU | MPI | Role | т | % E A | Effort S | с | | | | |
| Morey, Rebecca I | University Research Administration | Ľ | | Principal Investigator | 0.0 | 0.0 | 33.33 | 0.0 | Remove | Certify | × | Details |

Answer all of the certify questions by clicking the radial that best answers the question.

| Certify for More Proposal Number Sponsor : 001108 : | | | | Return to Investigato |
|-----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|------|-----------------------|
| Code | Question | Answer | | |
| Z2 | Are you currently Debarred, Suspended, or proposed for debarment or suspension? | O Yes | O No | Details |
| Z3 | Are you delinquent on any federal debt? | O Yes | O No | Details |
| H4 | Have lobbying activities have been conducted regarding this proposal? | O Yes | O No | Details |
| 100 | I certify that I have reviewed and understand the contents of the required training. | O Yes | O No | Details |
| 101 | Do you currently have any Significant Financial Interests (SFIs)? For assistance in understanding what qualifies as a reportable SFI, the Disclosing Your Significant Financial Interest (SFI) guide can be accessed through the link provided in the ¿more¿ option to this question or via the Office of Research website. | n 🔿 Yes | O No | Details |
| Save | Print Certification | | | |

Exercise 4: Credit Split

The Credit Split tab demonstrates that 100% of the proposed work will be covered by key personnel. When an award is set up, RAS directs the IDCs based on what is entered into this credit split screen in COEUS Lite.

| Credit Split: | |
|--------------------------------|-------------|
| | Recognition |
| Wade, Maureen C | 20.00 |
| 3801 - Research Administration | 100.00 |
| Unit Total | 100.00 |
| Morey, Rebecca I (PI) | 80.00 |
| 000001 - University | 30.00 |
| 3801 - Research Administration | 70.00 |
| Unit Total | 100.00 |
| Investigator Total | 100.00 |
| Save | |

| Action | Exercise Example |
|------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| In the dark gray field, enter how much of the work will be covered by each individual | 20% credit of time by Co-PI 80% credit of time by PI |
| If an investigator has a dual appointment, enter how the time will be divided among units. | 30% / 70% split for a dual appointment or 100% for a single. |

The light gray sections should total 100% for each person to reflect their split of formal employment departments, while the dark gray bar should amount to the percentage of time on which they'll be focused on this specific project. The totals of all of the dark gray bars combined should equal 100%.

Exercise 5: Complete Special Review Tab

Special Review denotes the type of review that must be done after a project is awarded funding but before research may begin. Special Review protects human and animal subjects as well as the environment.

| | Proposal Summary | Agency/Sponsor: | Morey, Rebecca I 001108 · National I | nstitute of Mental Health | | Proposal # : Proposal Period: | 00011687 (In Progress) 07/01/2018 - 06/30/2023 |
|-----|---------------------------|---------------------|-----------------------------------------------------------|---------------------------|------------------------|----------------------------------|---------------------------------------------------|
| 1 | General Info | Title: | Amyloidosis in Zeb | | | rioposari citoa. | 0110112010 0013012023 |
| 1 | Organization | Special Reviews | [Proposal No 00011687] | | | | |
| 4 | Investigators/Key Persons | | | | | | |
| 1 | Credit Split | *Indicates Required | Fields | | | | |
| | Special Review > | *Special Review : | Please Select | 1 | | *Approval:Please Select | ~ |
| | Abstract | Protocol No: | IACUC Review Animal Usage | Application Date: | Appro | oval Date: | • |
| | Science Code | Comments: | Biohazard Materials | | | | _ |
| | Others | | Biosafety Review | | | ^ | |
| | YNQ | | Execution of Contract FCOI Review - Check wording | | | \sim | |
| 4 | Proposal Roles | Save | Health and Safety Office | | | | |
| Que | estionnaire | List of Special R | Human Subjects IISA Review | | | | |
| | Solicitation Information | | Institutional Advancement | | | | |
| | Export Controls | | Internal Indemnification Review International Programs | Approval P | rotocol No Application | Date Approval Date Com | ments |
| | ORA Supplement | | REVIEW FRIDAYS | | | | |
| | | | Radiation Safety | | | | |
| | Grants.Gov | | Radioactive Isotopes Recombinant DNA | | | | |
| | User Attached S2S Forms | | Space Change | | | | |
| | | | TENET Review | | | | |
| | Budget | | | | | | |
| | Upload Attachments | | | | | | |
| | Submit for Approval | | | | | | |
| | Print | | | | | | |
| | Copy Proposal | | | | | | |
| | Email | | | | | | |
| | Add New Rolodex Entry | | | | | | |

| Action | Exercise Example |
|-----------------------------------------------------------------------------------------------------------------------------|-------------------------|
| Click Add Special Review. Use the <u>Spec</u> <u>Review</u> drop-down menu to make a selection. | ial Human Subjects |
| Click Start Protocol. Protocol will automatically be listed as approval per | Start Protocol ding. |

The Protocol has now been generated and can be found under the IRB Protocols tab with the information pre-populated based off of your proposal details.

| Animal Usage | The Animal Welfare Act requires that minimum standards of careand treatment be provided for certain animals bred for commercial sale, used in research, transported commercially, or exhibited to thepublic. |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Biohazard Materials | A biohazardous (etiological) agent is an infectious (pathogenic) substance produced from living organisms that has the potential for causing disease in other living organisms. |
| Human Subjects | Work that includes obtaining information about living individuals by: Intervening or interacting with them Obtaining identifiable private information Obtaining voluntary informed consent to be subjects in research Studying, interpreting, or analyzing identifiable private information of data |

| Recombinant DNA | Work involving "molecules that are constructed outside living cells by joining natural or synthetic DNA segments to DNA molecules that can replicate in a living cell, or molecules that result from the |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | replication of those described above." Synthetic DNA segments that are likely to yield a potentiallyharmful polynucleotide or polypeptide (e.g., a toxin or a pharmacologically active agent) are considered as equivalent to their natural DNA |
| | counterpart. If the synthetic DNA segment is not expressed in vivo as a biologically active polynucleotide or polypeptide product, it is exempt from the NIH Guidelines. |

Questions Exercise 6: Answer YNQ- Yes, No

Answer all of the questions in the YNQ tab, some of these may complete fields on proposal submission form pages.

| Y | 'NQ: | | |
|---|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| Ρ | roposal Question | | |
| | Question Id | westion | |
| | 11 | there space change on this proposal Yes No More | |
| | 21 | the proposal a full application related to submission of a preliminary application? Yes No More | |
| | G3 | azardous Materials are Used or Produced Yes No More | |
| | G4 | enetically Engineered organisms are Used or Produced Yes No More | |
| | H2 | Uman Anatomical Substances Are Used Ves No More | |
| | J4 | roject Requires Inter-Government Review for Activities that affect State or Local Government or Possible National Security Implications Yes No More | |
| | Z7 | ave you completed the most recent annual conflict of interest disclosure through Drexel One? Ves No No No | |
| | Z8 | disclosures were made, do any of the conflicts disclosed relate to the current sponsored project that could pose a risk to the objectivity of the design, conduct or repo search? Yes No More | rting of your |
| | Z9 | you answered yes to Z8, how do you plan to mitigate the potential for the conflicting financial interests to compromise the objectivity to which the project is designed, ported? Yes No More xplanation : | conducted or |
| | Save | | |
| | | | |
| | | | |

| Action | Exercise Example |
|--------------------------------------------------------------------------------------|------------------|
| Answer each question by clicking the Yes or No radial button | No to all |
| 2. Save Progress | Save |

Exercise 7: Proposal Roles – Granting Access to a Specific Proposal

You must be an "Aggregator" on a proposal to assign other people access. You may give additional Coeus users access to your entire proposal, or just to a particular section(s). Any roles you assign to a user apply only to the current proposal. If you copy a proposal, access rights do not carry over. Access rights apply only to the specific proposal number in which they are granted.

| Propo | Proposal Roles | | | | | | |
|--------|-----------------------------------------------|---------------------|----------|--|--|--|--|
| = Agg | regator | | Add User | | | | |
| User I |) User Name | Home Unit | | | | | |
| RIM26 | Morey, Rebecca I | 000001 : University | Remove | | | | |
| WADE | M Wade, Maureen C | 000001 : University | Remove | | | | |
| ± App | rover | | | | | | |
| ± Nari | ative Writer | | Add User | | | | |
| ± Bud | get Creator | | Add User | | | | |
| ± Viev | ver | | Add User | | | | |
| ± Acc | Access Proposal Person Institutional Salaries | | | | | | |
| ± Mod | ify Proposal Rates | | Add User | | | | |

| Ac | tion | Exercise Example |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| 1. | Click Add User at Role category line | Add User |
| 2. | In the Search window that appears, Search using user name field entering the beginning of last name and the * for a broad search (users must have Coeus ID) | Golding* |
| 3. | Select the user: they will be added to the role category | Click Nadine Golding |

| Role | Definition |
|------------------|------------------------------------------------------------------|
| Aggregator | Make changes to any part of the proposal, answer yes/no |
| | questions, certify investigators, submit for approval. |
| 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. The list of |
| | Approvers is set up in advance and maintained by the DLC and |
| | Research Administration. |
| 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. |

Exercise 8: Solicitation

Proposals may or may not be in response to a solicitation (funding opportunity announcement/program announcement/broad agency announcement); however, it is required to notify in the system if a solicitation is available.

| C | oeus Home | My Negotiations | My Proposals | My Awards | My COI | My IRB | Protocols My IACUC Pro | otocols | Inbox | My ARRA | Logout |
|---|------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|------------------------------|----------------|---------------------------------------|--------------|------------------------|---------|----------------------------------|------------------------------|--------|
| | All Proposals Proposals Waiting for Approval Proposals In Progress Create New Proposal Proposal Search Grants.gov Opportunity Search | | | | | | | | | | |
| | Proposal S | ummary | Investigator: Agency/Spor | | orey, Rebecca I 1108 : National In | stitute of I | lental Health | | Proposal # : Proposal Period: | 00011687 (In 07/01/2018 - | |
| 4 | General Inf | 0 | Title: | | nyloidosis in Zebr | afish | | | | | |
| 4 | Organizatio | n | Solicitation | Information | | | | | | | |
| 4 | Investigato | rs/Key Persons | Previous | Modify Start C | <u>)ver</u> | | | | | | |
| 4 | Credit Split | | | | | | | | | | |
| 4 | ✓ Special Review 1) Is a copy of the solicitation available? More ● Yes No | | | | re | | | | | | |
| | Abstract | | | | | | | | | | |
| | Science Co | de | Save & Pro | oceed | Print | | | | | | |

Open the Solicitation Information tab.

| Action | Exercise Example |
|------------------------------------------------------------------------------------|-------------------------------------------------|
| 1. Select radial to show if a solicitation is available | Click Yes, then Save and Proceed |
| 2. Use search to show solicitation documentation | Search |
| 3. In the window that opens choose the method the documentation is shown | LinkSave and Proceed |
| Copy and paste the URL link from the solicitation web page | http://www.drexel.edu/research/ |
| 5. Save work | Save |

| Soli | citatio | n Informa | ation | |
|------|----------|------------|--------------------------------------|--------|
| Pre | evious | Modify | Start Over | |
| | | | | |
| 1) | Please s | supply the | URL (Link) to the solicitation here. | |
| | | | | ~ |
| | | | | \sim |
| | | | | |
| S | ave & P | roceed | Print | |

If you choose PDF, you will be asked if you have uploaded a PDF of the Solicitation in the Upload Attachments section. Click Yes and then Save and Proceed, and make sure to then go into the Upload Attachments tab to upload your PDF. See Exercise 11 for further details on uploading attachments.

Exercise 9: Export Controls

As with the Internal Transmittals required by the Office of Research Administration, please complete the Export Controls Questions in relation to this proposal and the key personnel.

| Export Cont | trols | | | |
|-----------------------------------------|---------------------------------------------------------|-----------------------------------------------------------------------|----------------------------------------------------------------------|---------------------------------------------------------------------------------|
| Previous | <u>Modify</u> | Start Over | | |
| Therefore 1) Please re follow. If | e you are r ad the link you find the port@drex | equired to answer a ked instructions (clic hat you require addi | port Control Complia right) prior to answe upport please conta | ance Questionnaire to follow ering the questions that ct Export Controls: |
| Save & Pr | oceed | Print | | |

| Action | Exercise Example |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| The first question imparts the seriousness of export control questions. It is your responsibility to follow up with <u>comp.export@drexel.edu</u> at ORA if you have any questions or are unsure about how to answer. | Click YesSave and Proceed |
| 2. Select the necessary radial to answer each question | Select the yes or no radials as appropriate |
| Question 8 – List all organizations, Companies, etc. with whom you will be collaborating. | Carnegie Mellon |
| Question 9 – Other than the PI, what are the names of the Key Persons. Research Assistants and Students may be listed as TBA. | Xi QuenSave & Proceed |

Exercise 11: Upload Attachments for the Proposal

Coeus has three separate types of attachments, which are split into individual tabs/subsections: Upload Proposal Attachments, Upload Personnel Attachments, and Upload Institutional Attachments.

- The Proposal Attachments relate to the scientific portion of the submission. In the Upload Proposal Attachments section, there are some mandatory documents: Narrative, Abstract, or Statement of Work (so that your dept. head and dean have an idea of what kind of research you're proposing), Budget justification (to see how you are breaking down your budget and checking for correction), and a blank PDF titled "Placeholder" (because documents cannot be added or deleted once routing begins, but they can be replaced).
- Personnel Attachments are documents linked to a particular person on the project (E.g.. Biosketch, CV, Synergistic Activities etc.).
- Institutional Attachments are those required by ORA that will **not** be sent to the sponsor. The Upload Institutional Attachments section is where you can add your FCOI1 form and the earlier mentioned PDF version of the solicitation, if you did not provide a link.

| ≮. | Organization | Upload Proposal | Attachments Upload Personnel Attachments | Upload Institutional Attachments |
|--------------|---------------------------|------------------|------------------------------------------------|----------------------------------|
| \checkmark | Investigators/Key Persons | Add Documents | | |
| 4 | Credit Split | Attachment Type: | Please Select | |
| 4 | Special Review | | Narrative | |
| | Abstract | Description: | Facilities Equipment | |
| | Science Code | File Name: | Bibliography | Browse |
| | Others | Complete: | Project_Summary | |
| 4 | YNQ | Save | Budget_Justification Other | |
| 4 | Proposal Roles | List of Proposal | Additional_Key_Persons Additional_Equipment | |
| Que | Questionnaire | | Personal_Data | complete Description |
| | Solicitation Information | Attachment Type | rile Name/Opioaded Date by Opdate Oser | complete Description |

| Ad | ction | Exercise Example |
|----|---------------------------------------------------------------------|---------------------------------------|
| 1. | Choose the <u>attachment type</u> Narrative from the drop-down list | Narrative |
| 2. | Browse and upload the document | Browse, select a file, and click Open |
| 3. | Save progress | Save |
| 4. | Click on the Upload Personnel | Biosketch |
| | Attachments tab in the middle of the page, | • Your name |
| | choose the <u>attachment type</u> and <u>Person</u> | |
| | from the drop-down lists | |
| 5. | Type a <u>description</u> of the file | Your initials Biosketch 2018 |

| 6. | Browse and upload the document | Browse, select a file, and click Open |
|----|--------------------------------|---------------------------------------|
| 7. | Save progress | Save |

| Upload Proposal Atta | chments | Upload Personnel Attachments | | | | | |
|---------------------------|----------------------------|------------------------------|--|--|--|--|--|
| Add Documents | | | | | | | |
| | | | | | | | |
| Attachment Type: | Biosketch | ▼ | | | | | |
| Person: | Wade, Maureen C | | | | | | |
| Description: | Test | | | | | | |
| File Name: | Choose File No file chosen | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Save | | | | | | | |
| List of Personnel Attachr | nents | | | | | | |

Exercise 12: Budget Set Up

The Principal Investigator, Co-Investigator(s), or Key Personnel you have already entered on the Investigators/Key Persons screen of your proposal will automatically populate some of the data fields on this screen from the HRIS database (salary information is not automatically populated). To add other employees to the budget choose Add Employee, to add a consultant choose Add Non Employee*, to add an undetermined student, choose Add TBA.

Click on the Budget tab and select your appointment Type (duration) and edit Job Code, if necessary, and then click Save.

| Sync Budget Persons | |
|------------------------------------------------------------------|---------------------------|
| Please select Appointment Type and Jobcode for following persons | |
| Name | Appointment Type Job Code |
| Morey, Rebecca I | 12M DURATION V JOBCDE |
| | |
| Save | |

Personnel

| Re | turn To Proposal | Investigator: Morey, Rebecca I Agency/Sponsor: 001108 : National Institute o Title: Amyloidosis in Zebrafish | | 00011687 (In Progress) 07/01/2018 - 06/30/2023 |
|----|----------------------------------|--------------------------------------------------------------------------------------------------------------------|---------------------------------------|---------------------------------------------------|
| 4 | Budget Versions | Budget Personnel | version. | 1 |
| 4 | Budget Summary Print | Name Job Code A | Appointment Type Eff Date Base Salary | Remove Base Salary by Period |
| | Budget Set Up | Morey, Rebecca I JOBCDE | 12M DURATION 🔽 07/01/2018 | \$0.00 Remove Base Salary by Period |
| 4 | Personnel >> | Wade, Maureen C M00078 | 12M DURATION 🔽 07/01/2018 | \$0.00 Remove Base Salary by Period |
| 4 | Adjust Periods Proposal Rates | Add Employee Add Non Employee 4 | Add TBA Calculate All Base Sal | |
| | idate | Save | | |

Note: Personnel critical to the project (PI, Co-Investigator, & Key Personnel) **MUST** first be entered on the Proposal Investigators/Key Personnel screen (see Exercise 3), not via the Budget screens.

Students, Post Docs, Research Assistants, etc. are all listed under TBA. Add separate TBA entries for each RA.

| Action | Exercise Example |
|------------------------------------------------------------------------------------------------------------|-----------------------------|
| 1. <u>Add</u> a TBA Graduate student stipend find and click the type of TBA to add | TBA –Research Assistant PHD |
| 2. Under the field Job Code change to RA1 (the next RA added to the proposal would be listed as RA2, etc.) | RA1 |
| Under the field <u>base salary</u> enter the amount of stipend | 24,000 |
| 4. Select Save to save progress | Save |
| 5. Add a TBA Undergraduate student worker | TBA – Undergraduate |
| 6. Under the field Job Code change to UG1 | UG1 |

| 7. | Under the field <u>base salary</u> enter student monthly salary | 2,100 |
|----|-----------------------------------------------------------------|-------|
| 8. | Select Save to save progress | Save |

| Budget Personnel | | | | | | | |
|--------------------------------------------------------------------|----------|------------------|---|------------|-------------|-------------|-----------------------|
| Name | Job Code | Appointment Type | • | Eff Date | Base Salary | Remove | Base Salary by Period |
| Morey, Rebecca I | JOBCDE | 12M DURATION | ~ | 07/01/2018 | \$0.00 | Remove Base | Salary by Period |
| Wade, Maureen C | M00078 | 12M DURATION | ~ | 07/01/2018 | \$0.00 | Remove Base | Salary by Period |
| TBA - Research Assistant - PHC | RA1 | 12M DURATION | ~ | 07/01/2018 | \$24,000.00 | Remove Base | Salary by Period |
| TBA - Undergraduate | UG1 | 12M DURATION | ~ | 07/01/2018 | \$2100.00 × | Remove Base | Salary by Period |
| Add Employee Add Non Employee Add TBA Calculate All Base Sal | | | | | | | |
| Save | | | | | | | |

Eff Date: The Effective Date displayed automatically defaults to the start date of the proposal period. For Coeus to generate the most precise salary inflation, change the Effective Date to match the date of that employee category's Institute scheduled increase. Refer to your departmental personnel administrator or HR for specific policy.

Effort and Charged amount must be the same unless: You are applying for an NIH grant and your salary is above the salary cap (\$189,600 for 12 month appointments as of January 1, 2018) or if you will be cost sharing with your departments (note that you are not allow to cost share on NSF grants).

Proposal Rates

From the Proposal Rates screen you can change the rates from the standard Drexel rates. It is possible to modify the indirect cost percentage, the inflation, or fringe benefits. If changes are made to the IDC, remember to attach the indirect cost waiver form under Upload Institutional Attachments.

If you feel you need to change the rate types, please confirm this first with your ORA representative for appropriateness.

| Activity Type: Organized Research F and A | | | | | |
|----------------------------------------------|---------------|--------------|------------|----------------|-----------------|
| Rate Type | On Off Campus | Project Year | Start Date | Institute Rate | Applicable Rate |
| MTDC | Off | 2017 | 07/01/2016 | 26.0 | 26.0 |
| MTDC | On | 2017 | 07/01/2016 | 56.5 | 10.00 |

Note: If you make a mistake or change your mind, you can click **Reset** at the bottom of the screen to revert back to the Institute rates.

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

| Action | Exercise Example |
|--------------------------------------------------------|----------------------|
| If submitting a proposal where 10% is the only | MTDC On Campus: 10.0 |
| allowable IDC rate select the appropriate F and A rate | |
| field and enter that rate. Then Save. | |

Exercise 13: Add Budget Details to Yr1

Once you have completed the Budget Set Up, you can begin to enter budget line item details into the Budget Periods screens *as required* of your proposal:

- Personnel Budget
- Equipment
- Travel
- Participant/Trainee
- Other Direct Costs.

The first time you access these screens, you will see only the *Period 1* tab of your budget. Then, once all the proposal periods have been generated (described in Exercise 15), individual tabs will appear for each proposal period. You can then click on each tab and make adjustments relevant to that period.

Please refer to your sponsor guidelines, specific opportunity instructions, and Institutional Policy and Procedures to determine which details are required in your proposal budget.

Personnel Budget

When first opened, the Personnel Budget screen displays an initial *Total Funds Requested (\$)* of \$0.00 and the dates of the budget *Period 1*, which spans the first year of your proposal. Click <u>Add Person</u> to add the personnel who must be included in the budget from the pick-list of personnel you previously created on the Personnel screen.

| Name | Job Code | Appointment Type |
|--------------------------------|----------|------------------|
| Wade, Maureen C | M00078 | 12M DURATION |
| Morey, Rebecca I | JOBCDE | 12M DURATION |
| TBA - Research Assistant - PHD | RA1 | 12M DURATION |
| TBA - Undergraduate | UG1 | 12M DURATION |

- 1. Select people by checking each box (or check the header box to select all)
- 2. Click Save

All the names you just selected will now be displayed on the Personnel Budget screen:

| Period 1 | | | | | | | |
|------------------------|---------------|---------------|--------------------|-----------------|------------------|--------------------|-----------------|
| Direct Cost | | Indirect Cost | | Cost :\$0.00 | | No. (| of Months :12.0 |
| Under Recovery | \$0.00 | Cost Share | :\$0.00 P | eriod :07/01/20 | 018 - 06/30/2019 | | |
| Personnel Budget | | | | | | | |
| Name | Wade, Mauree | n C | Salary Type | | | Y | Edit Remove |
| Period | Calendar | ~ | %Charged | 0.00 | | %Effort | 0.00 |
| Start Date: | 07/01/2018 | - | End Date: | 06/30/2019 | | Months | 0.0 |
| Requested Salary(\$) | \$0.00 | | Fringe Benefit(\$) | \$0.00 | Fu | inds Requested(\$) | \$0.00 |
| Name | Morey, Rebect | ca I | Salary Type | | | ~ | Edit Remove |
| Period | Calendar | ~ | %Charged | 0.00 | | %Effort | 0.00 |
| Start Date: | 07/01/2018 | | End Date: | 06/30/2019 | 1 | Months | 0.0 |
| Requested Salary(\$) | \$0.00 | | Fringe Benefit(\$) | \$0.00 | Fu | Inds Requested(\$) | \$0.00 |
| Name | TBA - Researd | h Assistant - | Salary Type | | | ~ | Edit Remove |
| Period | Calendar | ~ | %Charged | 0.00 | | %Effort | 0.00 |
| Start Date: | 07/01/2018 | | End Date: | 06/30/2019 | | Months | 0.0 |
| Requested Salary(\$) | \$0.00 | | Fringe Benefit(\$) | \$0.00 | Fu | unds Requested(\$) | \$0.00 |
| Name | TBA - Undergr | aduate | Salary Type | | | ~ | Edit Remove |
| Period | Calendar | ~ | %Charged | 0.00 | | %Effort | 0.00 |
| Start Date: | 07/01/2018 | | End Date: | 06/30/2019 | | Months | 0.0 |
| Requested Salary(\$) | \$0.00 | | Fringe Benefit(\$) | \$0.00 | Fu | inds Requested(\$) | \$0.00 |
| Add Person Calculate | | | | | | | |
| Save | | | | | | | |

| Action | Exercise Example |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| Find your Co-Investigator and use the drop-down menu to select <u>salary type</u> based upon the appointment type | 2011 Faculty 12/12 |
| 2. Under <u>period</u> use the drop-down list to select the time period that they will spend working on the project | Calendar |
| 3. Enter the <u>% charged</u> and <u>% effort</u> . These should be the same unless the department will cost share effort. | 50% |
| Find yourself and use the drop-down menu to select <u>salary</u> <u>type</u> based upon the appointment type | 2070 Summer Salary |
| 5. Under <u>Period</u> use the drop-down list to select the time period that they will spend working on the project | Summer |
| Enter the <u>% charge</u> and <u>% effort</u>. These should be the same unless the department will cost share effort | 33.33% |
| Update the <u>start</u> and <u>end date</u> to reflect the three months that comprise the summer, so that months calculate correctly | 07/01/2018-09/30/2018 |
| Research Assistant -PhD, select <u>salary type</u> Research Assistant Salary, choose the <u>period</u> of work and enter <u>%</u> <u>charge</u> and <u>% effort</u> | 2420 Research Assistant Salary Calendar 100% |
| For the undergraduate student, select <u>salary type</u> Student Salary, choose the <u>period</u> of work and enter <u>% charge</u> and <u>%</u> <u>effort</u> | 2450 Undergraduate Student Salary Calendar |

| | • 25% effort and 25% charged |
|----------------------------------|------------------------------|
| 10. Select save to keep progress | Save |

Period

| Academic | The nine-month academic year, September 1 – May31 |
|----------|---------------------------------------------------|
| Calendar | The 12-month calendar year |
| Summer | The three-month summer period, June 1 – August 31 |

| Appointment Type | Description |
|------------------|-------------------------|
| 9M Duration | Base Salary ÷ 9 Months |
| 10M Duration | Base Salary ÷ 10 Months |
| 12M Employee | Base Salary ÷ 12 Months |

Equipment/Travel/Participant Trainee

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

Equipment must be one item greater than or equal to \$5,000. Drexel doesn't take IDC on pieces of equipment greater than \$5,000. All other equipment expenses less than \$5,000 per item should be listed under Other Direct Costs.

| Investigator: Morey, Rebecca I Agency/Sponsor: 001108 : National Institute of M Title: Amyloidosis in Zebrafish | | : 00011687 (In Progress) 1: 07/01/2018 - 06/30/2023 : 1 | | |
|-----------------------------------------------------------------------------------------------------------------------|-----------------------------------------|---------------------------------------------------------------|-----------|------------|
| Period 1 | | | | |
| Period Totals | | | | |
| Direct Cost : \$24,525.00 Ind | lirect Cost: \$0.00 Total Cost: \$24,52 | 5.00 | No. of Mo | nths: 12.0 |
| Under Recovery : \$0.00 C | Cost Share : \$0.00 Period : 07/01/2 | 018 - 06/30/2019 | | |
| Budget Equipment - List items and de | ollar amount for each item exceedin | g \$5000 | | |
| Туре | Description | Funds Requested (\$) | | |
| 6310 Software/Computer Equip Exp >\$: | Computer Server | \$15000.00 | Edit | Remove |
| Add Equipment Calculate | Total Equipment | \$0.00 | | |
| Save | | | | |

| Action | Exercise Example |
|--------------------------------------------------|--------------------------------|
| 1. Click on the Equipment tab. Use the drop-down | Software/ Computer Equipment > |
| menu to select the <u>type</u> of expense. | \$5,000 |

| 2. | Enter <u>descriptions</u> – the description from Equipment page will print to your budget submission form | Computer Server |
|----|-----------------------------------------------------------------------------------------------------------------|-----------------|
| 3. | Funds requested - enter the amount to request | 15,000 |
| 4. | Save progress | Save |

Note: The Equipment, Travel, and Participant Trainee tabs all work the same way.

Other Direct Costs Screen

Most expenses will need to be entered in other direct costs, including tuition costs. When first opened, the Other Direct Costs screen displays an initial *Total Funds Requested* (\$) of \$0.00 and the dates of the budget *Period 1*, which spans the first year of your proposal. Click <u>Add Direct Costs</u> to add additional lines of expense to be included in the budget.

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

Common examples: Lab supplies, publication expenses, Subcontracts up to \$25,000, Professional services, equipment less than \$5,000, Tuition. For Subcontracts over \$25,000, we take indirect costs on the first \$25,000. In year 1, you will have two line items for subs: Subcontracts less than \$25,000 and Subcontracts greater than \$25,000.

| Line Item Details | | | | | |
|----------------------------------|-------------------------|---------------|------------------|------------------------|--------------|
| Save and Apply to Cur | rent Period | Save and Appl | <u>y to Curr</u> | ent and Later Periods | <u>Close</u> |
| Description: PhD Student Tuition | | | | | |
| Start Date: 07/01/2018 | End Date: 06/ | /30/2019 | | Quantity: 0.00 | |
| Cost: | Cost Sharing: | \$11,500. | 00 | Underrecovery: | \$0.00 |
| Apply Inflation: 🕑 | On Campus: 🕑 | | | Submit Cost Sharing: 🕑 | |
| | | | | | |
| Rates Applicable to the Line It | em | | | | |
| Rate Types | | Apply | Cost | Cost Sharing | |
| Calculated | Amounts are not availat | ole | | | |
| Save and Apply to Cur | rent Period | Save and Appl | <u>y to Curr</u> | ent and Later Periods | <u>Close</u> |
| | | | | | |
| Budget Other Direct Costs | | | | | |

| Description | Funds Requested (\$) | | |
|---------------------|----------------------|------|--------|
| | | | |
| PhD Student Tuition | \$22,000.00 | Edit | Remove |
| PhD Student Tuition | \$0.00 | Edit | Remove |
| | | | |

| Action | Exercise Example |
|-----------------------------------------------------------------------------------------------------------------------|-------------------------------------|
| Use the drop-down menu to select the <u>type</u> of expense | 4514 PhD Tuition Remission and Fees |
| 2. Enter a <u>description</u> of what the money will be used for | PhD Student Tuition |
| If all of the tuition is requested of the sponsor, enter the amount in <u>funds</u> requested | Enter 22,000 |

| 4. Enter another line of expense in the budge | t Click Add Direct Costs |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|
| Use the drop-down menu to select the typ of expense | e Tuition: Graduate |
| 6. If some or all of the tuition will be cost sha choose <u>edit</u> , a new window will appear wh cost to the sponsor and cost sharing amou can be entered (be sure the window is not blocked by a pop-up blocker). If cost sharin will be shown to sponsor click check box. | ere • 11,500 cost sharing nts |
| 7. Save progress | Click Save and Apply to Current Periods |

Travel

Two types of travel in dropdown: domestic and foreign

Participant/Trainee

1. Participant support costs are those costs paid to (or on behalf of) participants in meetings, conferences, symposia, training activities, workshops and similar research activities/events.

Your Ras and other persons working on the research are not considered participants.

Exercise 14: Cost Sharing

Cost sharing is any project costs that are not reimbursed by the sponsor to support the scope of the work defined by the federal or non-federal sponsored award. The most common example of cost sharing is for an external sponsor to provide most of the funds, and the university to provide the remainder of the project funds.

If you have entered cost sharing into the budget, as in the exercise above, it is required that the expense be accounted for and justified.

| Investigator: Morey, Reb Agency/Sponsor: 001108 : Na Title: Zebrafish 2 | itional Institute of Mental Hea | | | Proposal #: 00013956 sal Period: 07/01/201 Version: 4 | | |
|-------------------------------------------------------------------------------|-----------------------------------|---------------------------------|---------------------------|-------------------------------------------------------------|-----------------------------------------|--------|
| Budget Totals | | | | | | |
| Direct Cost : Under Recovery : | \$197,892.88 \$23,200.19 | Indirect Cost : Cost Share : | \$4,989.29 \$11,500.00 | Total Cost : Period : | \$202,882.17 07/01/2018 - 06/30/2023 | |
| Budget Period | | Total Cost Sharir | ng Amount | | | |
| 2 | | \$11,500.00 \$0.00 \$0.00 | | | | |
| 5 4 5 | | \$0.00 \$0.00 \$0.00 | | | | |
| Cost Sharing Distribution List | | | | | | |
| | <u>View Sub Award Cost Sharin</u> | g | | | | |
| Project Year | Percent | | Amount | | Source Account | |
| 2019 | 0.00 | | \$1,500.00 | | 6301 | Remove |
| 2019 | 0.00 | | \$10,000.00 | | 3852 | Remove |
| Save | | , | | | | |

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. Remove lines for years in which you will have no cost sharing.

| Ac | tion | Exercise Example |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Navigate to the Cost Sharing Distribution of the budget | Click Cost Sharing Distribution |
| 2. | The total expense of cost sharing is calculated in the amount column, enter the source account or departmental account number for each year (the source who is providing that money) | 6301 |
| 3. | If cost sharing will be paid by more than one account, add a line and manually enter the FY period, amount and account to be charged | Click Add Cost Sharing Distribution Enter 2019 Split up the \$11,500 across the two funds in 2019 Enter the Department fund number |

| • | Remove remaining years, if not |
|---|--------------------------------|
| | applicable |
| | |

The Office of Research Administration also requires any Cost Sharing to be justified. As soon as cost sharing is added to a budget, a new form will appear in the main section of the proposal. Return to the proposal and you will see a new option on the left navigation menu.



| Action | Exercise Example |
|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Navigate to the Cost Sharing Justification in Proposal section | n the Click Cost Sharing Justification |
| Answer Cost Sharing questions, selecting the appropriate radial button | ne No |
| 3. Enter explanation for Cost Sharing if promp | Cost Sharing per agreement with ORA from 11/1/2018 Save |

Detailed Period 1 Budget

Once you have entered all the recurring expenses required for your Period 1 budget, use the <u>Generate All Periods</u> feature to calculate all budget periods for your proposal. Coeus will use the period start and end dates you entered on the General Info screen, inflation data from the Proposal Rates screen, and the line item costs entered in the Budget Period 1 screens.

| ✓ Budget Versions | Generate Periods |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ✓ Budget Summary | Prepare entire budget for period 1 and use the Generate Periods utility to forward the data for subsequent years. This process will copy |
| Print | Period 1 line item content of each section to create budget for subsequent years. |
| Budget Set Up | 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 |
| ✓ Personnel | |
| Adjust Periods | |
| ✓ Proposal Rates | |
| Validate | |
| Budget Periods | |
| ✓ Personnel Budget | |
| ✓ Equipment | |
| Travel | |
| Participant/Trainee | |
| ✓ Other Direct Costs | |
| Modular Budget | |
| Cost Sharing Distribution | |
| Under Recovery Distribution | |
| Project Income | |
| Generate All Periods >> | |

Note: Before you Generate All Periods

- If you do NOT want a line item to appear in every period, do NOT include it in Period 1. <u>Generate All Periods</u> first, then enter that line item in the appropriate period(s).
- Prior to using <u>Generate All Periods</u>, review the <u>Proposal Rates</u> screen and review and revise the Inflation Rates, if necessary.
- Consider deselecting the *Apply Inflation* checkbox on specific line items instead of entire categories, if this is more appropriate for your proposal budget.
 - Remember, you can find the *Apply Inflation* checkbox by clicking <u>Edit</u> next to a line item, and the <u>Line Item Details</u> screen will pop-up.

Coeus automatically adjusts 3% each year for inflation. If you don't want inflation, under Budget Set Up, click on proposal rates. Under the inflation section, change all of the 3.0 (3%) to zeros.

- 1. Return to the Budget tab and click <u>Generate All Periods</u> on the menu. This will start a process which will use all of the Period 1 line items to create details for subsequent periods.
- 2. A warning screen will appear to alert you of the one-time-use per budget of the Generate option. Click <u>Generate Periods</u> on this screen to continue.
- 3. A confirmation message will be displayed.
- 4. When you return to view the Budget Periods screens of your budget (<u>Personnel</u>, <u>Equipment</u>, <u>Travel</u>, <u>Participant/Trainee</u>, or <u>Other Direct Costs</u>), the additional periods will be displayed as tabs.
- 5. Now you can go back and add more expenses to later years or modify those that generated automatically.

| Action | Exercise Example | | | | |
|----------------------------------------------|-----------------------------------------|--|--|--|--|
| 1. Go to the Equipment tab. Modify budget to | • Use the top tabs to navigate years | | | | |
| remove equipment from future years. | • Select remove to delete the equipment | | | | |

| Period 1 | Period 2 | Period 3 | Period 4 | Period 5 | | | | | | |
|------------------------------------------------------|-------------|----------------------------------------------------|------------|--------------------------------------------------------------|------------------|----------------------|-----------|----------------------|--------|--------|
| Perio | d Totals | | | | | | | | | |
| Direct Cost : \$72,525.00 Under Recovery : \$0.00 | | Indirect Cost : \$0.00 Cost Share : \$11,500.00 | | Total Cost : \$72,525.00 Period : 07/01/2019 - 06/30/2020 | | No. of Months : 12.0 | | | | |
| | | | | | | | | | | |
| Budg | et Equipm | ent - Li | st items | and dolla | ar amount for ea | ich item excee | ding \$50 | 00 | | |
| | | Тур | е | | | Description | | Funds Requested (\$) | | |
| | 6310 Softwa | re/Comput | er Equip E | xp >\$: 🗸 | Computer Serve | Computer Server | | \$15,000.0 | 0 Edit | Remove |
| A | d Equipme | nt <u>Calcul</u> | ate | | | Total Equipment | | \$15,000.00 | | |
| | | 1 | | | | | | | | |
| | Save | | | | | | | | | |

Exercise 16: Create Alternate Versions of Budget

The <u>Budget Versions</u> tab displays a summary of all budget versions created in this proposal.

You can create alternate budget scenarios:

- Click the <u>Add New Version</u> link to create with a new budget version not based on the existing one.
- Click <u>Copy</u> to create a new budget version by making a copy of the existing budget.
 - You can choose to copy only Period 1, or All Periods, depending on how many changes you'd like to make.

On this screen, you can also mark your budget Final and Complete.

Note: Once you have created more than one version of the budget, the <u>Budget Versions</u> screen will open each time you navigate to the budget. You must then click <u>Open</u> to the right of the Budget Version you wish to view or edit.

| Return To Proposal Budget Versions | | ncy/Sponsor: | Morey, Rebecca I 001108 : National Amyloidosis in Zel | Institute of Mental H | lea | | al #: 00011687 (In riod: 07/01/2018 - 0 | | | |
|------------------------------------|-----|----------------|-------------------------------------------------------------|-----------------------|--------------|---------------|----------------------------------------------|-------|------|------------|
| | Bud | get Versions | • | Jansh | | | | | | |
| | в | udget Status:[| Incomplete V | Final Version: | | | | | | |
| | | Version | Start Date | End Date | Direct Cost | Indirect Cost | Total Cost | Final | | |
| | | 1 | 07/01/2018 | 06/30/2023 | \$347,625.00 | \$0.00 | \$347,625.00 | | Open | Сору |
| | L | Comments: | | | | | | | | \bigcirc |
| | | 2 | 07/01/2018 | 06/30/2023 | \$72,525.00 | \$0.00 | \$72,525.00 | | Open | Сору |
| | L | Comments: | | | | | | | | \bigcirc |
| | A | dd New Versio | n | | | | | | | |
| | | Save | | | | | | | | |

| Action | Exercise Example |
|--------------------------|---------------------------|
| Copy the existing budget | • Select copy, |
| | Choose copy period 1 only |

| Coeus Home | My Negotiatio | ons My Proposals | My Awards | My COI | My IRB Protocols | My IACUC Protoc | ols Inbox | My ARRA | Logout |
|---------------|---------------|-------------------------------------------------------|--------------------|--------|------------------|-----------------|----------------------------------------------------------|----------------|-----------|
| Return To Pro | posal | Investigator: Mor Agency/Sponsor: 001 Title: Am | | | ea | Proposal Peri | I #: 00011687 (In Pro ied: 07/01/2018 - 06/3 on: 2 | | |
| 🖌 Budget Ve | rsions | Budget Summary | ,1010000 111 20010 | | | | | | |
| 🖌 Budget S | ummary >> | | | | | | | | |
| Print | | Budget Summar | y : Version 2 | | | | | | |
| Budget | Set Up | | Incomplete | | ~ | | lodular Budget: 🗌 | Submit Cost SI | naring: 🗹 |
| Personne | 4 | On/Off Campu | s: Default | | ~ | Total Co | st Limit: | \$0.00 | |

From here you can create or adjust your new budget version just as you did in Version 1. Enter any notes to yourself for differentiation under the comments section of the Budget Summary.

Once you have saved the new version, the <u>Budget Versions</u> screen will open each time you navigate to the budget and will display all versions created for this proposal. You must select which version you want to view or edit by clicking <u>Open</u> to the right of that version.

You can mark the budget as *Complete* and *Final* either on the <u>Budget Versions</u> screen, or on the <u>Budget Summary</u> screen, but only the <u>Budget Versions</u> screen allows you to change the budget status once you have marked it *Complete* and *Final*.

Exercise 17: Modular Budgets (NIH ONLY)

Modular budgets are a submission option for NIH ONLY.

You can create the Detailed budget in Coeus Lite and automatically convert it to a Modular format.

Once the Detailed budget is complete in Coeus, you can use the <u>Sync with Detailed Budget</u> function to have Coeus automatically 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.

| Re | turn To Proposal | | | 01108 : Na | | tute of Ment | al Hea | Proposal #: 000 Proposal Period: 07/0 Version: 2 | 11687 (In Progress) 1/2018 - 06/30/2023 |
|-----|-------------------------------|----------|-----------|------------|-------------|---------------|-------------|--------------------------------------------------------|--------------------------------------------|
| 4 | Budget Versions | Period 1 | Period 2 | Period 3 | Period 4 | Period 5 | Cumulative | | |
| 4 | Budget Summary | | 07/01/201 | | | T enou 5 | Guindiative | | |
| | Print | Period : | 07/01/201 | 8 - 00/30/ | 2019 | | | | |
| | | Direct C | osts | | | | | | |
| | Budget Set Up | | | | | | Dire | ct Cost less Consortium F& | A: \$75,000.00 |
| 4 | Personnel | | | | | | | Consortium F& | A: \$0.00 |
| | Adjust Periods | | | | | | | Total Direct Cos | ts: \$75,000.00 |
| 1 | Proposal Rates | | | | | | | | |
| | | Indirect | | | | | 100.0- | 4-19/) IDC D | |
| Val | lidate | Rate Num | ider | Indire | ect Cost Ty | уре | IDC Ra | | Funds Requested(\$) |
| Syr | nc Calculated Line Item costs | | | | | | | Total Indirect Cos | • |
| | | | | | | | | Total Funds Request | ed: \$75,000.00 |
| | Budget Periods | Add Indi | rect Cost | Sync with | h Detailed | <u>Budget</u> | | | |
| 4 | Personnel Budget | s | ave | | | | | | |
| 4 | Equipment | | | | | | | | |
| | Travel | | | | | | | | |
| | Participant/Trainee | | | | | | | | |
| 4 | Other Direct Costs | | | | | | | | |
| | | | | | | | | | |
| 4 | Modular Budget >> | > | | | | | | | |

| Action | Exercise Example |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| Open the Modular Budget tab. Update the modular budget page by selecting <u>sync with</u> <u>detailed budget.</u> | Sync |
| If the costs are not correct edit the <u>Direct Cost</u> <u>less Consortium F&A</u> field to reflect the appropriate \$25,000 module | |

Exercise 18: Adding a Subcontract to Budget

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

Note: For you to add a subcontract to the COEUS record you should have the following documents:

- Scope of Work
- Budget
- Budget Narrative
- Subrecipient Commitment Form

All the forms can be uploaded in the Upload Proposal Attachment section in the original Proposal portion of COEUS (if in budget section, click Return to Proposal in top left corner).

Click on the "Upload Attachments" bar on the navigation menu and select the attachment type as PDF. Enter the description of the form and choose the file. Hit "Save" and repeat for all of the documents listed above.

Please note: if you have a subaward budget line in the COUES "other direct costs" and do not have the forms attached your COEUS record will be rejected by the Pre Award Manager

Subcontracts are entered as an <u>Other Direct Cost</u> navigate to that option under Budget Periods and select the first year that the Subcontract appears by using the <u>Period</u> tabs.

| dget Other Direct Costs | | | | | | | |
|----------------------------|------------------------------|----------------------|------|-------|--|--|--|
| Туре | Description | Funds Requested (\$) | | | | | |
| 4516 Tuition: Graduate | PhD Graduate Student Tuition | \$22,000.00 | Edit | Remov | | | |
| 4516 Tuition: Graduate | PhD Graduate Student Tuition | \$11,000.00 | Edit | Remov | | | |
| Please SelectV | | \$0.00 | Edit | Remov | | | |
| | | | | | | | |
| | Total Other Direct Costs | \$33,000.00 | | | | | |
| Add Direct Costs Calculate | | | | | | | |
| | | | | | | | |
| Save | | | | | | | |

| Action | Exercise Example | | | |
|------------------------------------------------------------------------------------------------------------------------------------------|------------------|--|--|--|
| Modify the Budget Other Direct Costs screen by selecting Add Direct Costs, this will present a new line item | Add Direct Costs | | | |

| 2. | Use the drop-down list to select the first type of Subcontract amount to add, those subject to additional F&A at Drexel | Choose 7011 Subcontracts < \$25,000 |
|----|-------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|
| 3. | Enter the full name of Subcontract site in the Description | Carnegie Mellon |
| 4. | Enter the amount of the Subcontract in year 1 (amount up to \$25,000) | \$25,000 |

| Budget Other Direct Costs | | | | |
|---------------------------------------|---------------------|----------------------|------|--------|
| Туре | Description | Funds Requested (\$) | | |
| 4514 PhD Tuition Remission and Fees 🔻 | PhD Student Tuition | \$22,000.00 | Edit | Remove |
| 4514 PhD Tuition Remission and Fees V | PhD Student Tuition | \$0.00 | Edit | Remove |
| 7011 Subcontracts Direct <\$25,000 V | CM | \$25,000.00 | Edit | Remove |

| 5. | Account for the remaining Subcontract expense by adding another line | Add Direct Costs |
|----|----------------------------------------------------------------------|------------------------------------|
| 6. | This line is the Subcontract amount that Drexel may not charge F&A | Choose 7012 Subcontracts >\$25,000 |
| 7. | Enter the full name of Subcontract site in the Description | Carnegie Mellon |
| 8. | Enter the remaining amount of the Subcontract in year 1 | \$100,000 |
| 9. | Save Progress | Save |

| lget Other Direct Costs | | | | | | |
|---------------------------------------|---------------------|----------------------|------|-------|--|--|
| Туре | Description | Funds Requested (\$) | | | | |
| 4514 PhD Tuition Remission and Fees 🔻 | PhD Student Tuition | \$22,000.00 | Edit | Remov | | |
| 4514 PhD Tuition Remission and Fees 🔻 | PhD Student Tuition | \$0.00 | Edit | Remo | | |
| 7011 Subcontracts Direct <\$25,000 V | СМ | \$25,000.00 | Edit | Remo | | |
| 7012 SubcontractsDirect >\$25.000 | CM | \$100,000.00 | Edit | Remo | | |

Exercise 19: Finalize Budget

Before submitting, you must mark your budget as *Final* and *Complete*. Final indicates that only this version of the budget will be transmitted to the sponsor.

| Return To Proposal | Investigator: Morey, Rebecca I Agency/Sponsor: 001108 : National Institute of Mental Hea Title: Amyloidosis in Zebrafish | | | | roposal #: 00011687 sal Period: 07/01/2018 Version: 1 | | |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|-------------------------|--------------|-----------------------|-------------------------------------------------------------|---------------------|-----------------|
| Budget Versions | Budget Summary | | | | | | |
| ✓ Budget Summary >> | | | | | | | |
| Print | Budget Summary : | Version 1 | | | | | |
| Budget Cet Up | Budget Status: | Complete | | Final: | Modular Budget | : 🗹 🛛 Submit Cos | t Sharing: 🗹 |
| Budget Set Up | On/Off Campus: | Default | | | otal Cost Limit: | \$0.00 | |
| Personnel | Residual Funds: | \$0.0 | 00 | Total Di | rect Cost Limit: | \$0.00 | |
| Adjust Periods | OverHead Rate Type: | MTDC | | VINderreco | very Rate Type: MTDO | ; | \checkmark |
| Proposal Rates | Comments: | | | | | - | |
| Validate | | | | | | | \sim |
| Sync Calculated Line Item costs Budget Totals | | | | | | | |
| | Direct C | Cost: \$472,625.00 | Indir | ect Cost : \$0.00 | Total Co | ost:\$472,625.00 | |
| Budget Periods | Under Recov | very:\$0.00 | Co | st Share : \$57,500.0 | 0 Peri | od: 07/01/2018 06/3 | 0/2023 |
| Personnel Budget | | | | | | | |
| Equipment | Budget Periods | | | | | | T (10) |
| Travel | Period Start Date End | d Date No. of Months | Direct Cost | Indirect Cost | Under Recovery | Cost Sharing | Total Cost |
| Participant/Trainee | 1 07/01/2018 06/3 | 30/2019 12.0 | \$197,525.00 | \$0.00 | \$0.00 | \$11,500.00 | \$197,525.00 |
| Other Direct Costs | 2 07/01/2019 06/3 | 30/2020 12.0 | \$57,525.00 | \$0.00 | \$0.00 | \$11,500.00 | \$57,525.00 |
| 🖌 Modular Budget | 3 07/01/2020 06/3 | 30/2021 12.0 | \$72,525.00 | \$0.00 | \$0.00 | \$11,500.00 | \$72,525.00 |
| Cost Sharing | 4 07/01/2021 06/3 | 30/2022 12.0 | \$72,525.00 | \$0.00 | \$0.00 | \$11,500.00 | \$72,525.00 |
| Distribution | 5 07/01/2022 06/3 | 30/2023 12.0 | \$72,525.00 | \$0.00 | \$0.00 | \$11,500.00 | \$72,525.00 |
| Under Recovery Distribution | | | | | | | |
| Project Income | Save | | | | | | |

You can use the budget summary to view your Direct and Indirects Costs for each year of the budget as well as the total dollar amount. Ensure the correct On or Off Campus rate. Ensure that your Overhead Rate Type is correct:

MTDC - for all federal/government solicitations unless otherwise stated in solicitation

TDC - for all industry/private solicitations, unless otherwise stated in solicitation

| Ac | tion | Exercise Example |
|----|------------------------------------------------------------------------------------------------|-------------------------------|
| 1. | Open the <u>Budget Summary</u> screen to mark the budget final | Click Final checkbox |
| 2. | If budget will be sent as modular budget, mark the check box here | Click Modular budget checkbox |
| 3. | Mark a budget complete when finished with the budget using the <u>budget status</u> drop-down. | Complete |

You can also use the Validate button to validate the budget and search for errors.

Exercise 21: Submit for Approvals

Select Submit for Approval when the proposal is *finished* (i.e., checked and validated) to begin routing for internal approval. The proposal budget must be marked 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

- Make sure that you <u>Certify</u> all Investigators.
- Mark your budget as Final and Complete on the <u>Budget Summary</u> or <u>Budget</u> <u>Version</u> screen
- Navigate to the <u>budget tab</u> and select <u>Validate</u>;
- Respond to any errors displayed by making the necessary corrections.

| Ac | tion | Exercise Example |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| 1. | Return to Proposal. Once the proposal has passed all validations, it will be possible to submit the proposal for departmental, school and university review, click <u>Submit</u> <u>for Approval</u> from the left menu | Click Submit for Approval |
| 2. | The proposal will be validated, when validations pass, click <u>OK</u> | Click OK |

Proposal Submitted successfully

The proposal is successfully submitted for Routing

OK

Exercise 22: View Proposal Routing

The proposal routing will show who has and who has not approved the proposal. When trying to determine who to contact for a needed action, such as approve or reject the proposal back to you for edits, the proposal routing can be very helpful. Note that as the PI, you are also the first person on the routing list that needs to formally approve the entry, so please make sure you not only route the proposal for approval, but you then go in and approve it.

The status <u>Waiting for Approval</u> shows that the proposal is within that person's inbox, so they would be the necessary person to contact.

| Department Required for Proposal Approval | | | | | | | | |
|----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-----------------|------------------------|----------------------|-------------|--|--|--|
| | Below is the list of the Approvers who are required to approve this proposal before it may be submitted to the agency. | | | | | | | |
| (000001) ORA - COEUS Training Instance Review Hide | | | | | | | | |
| | | | To be submitted | | | | | |
| 🌽 🖉 King, Claire A To | | | To be submitted | | | | | |
| | | | | | | | | |
| | (00000 1) Inve | stigators | | | Hide | | | |
| | 赵 🖆 | Palmer, Susan L | Waiting for approval | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | <u>Hierarchy</u> | | | | | | | |
| | | | | | Hide Legend | | | |
| | 🎽 Primary Ap | prover | 🖉 Alternate Approver | 🚊 Approved | 🍎 Bypassed | | | |
| | Approved b To be subr | | in progress | 🖹 Passed 🙀 Delegated | 🗙 Rejected | | | |
| | 🖉 To be subr | nitted | 😭 Waiting for approval | Delegated | | | | |

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

Select **Show** to expand the approval box. Select **Hide** to minimize the approval box. Select **Hierarchy** to see the Approval Map Hierarchy view. Select **Hide Legend** to hide the panel of legend icons.

Exercise 23: Copy or Delete Proposal

Copying an existing proposal is especially useful for preparing a Change/Corrected, or for updating and resubmitting a similar work to the same or different sponsor. You must have the Aggregator Role in order to copy all Narratives and Budget.

| | Proposal Summary | Investigator: | Morey | , Rebecca I 8 : National Institute of Mental Health | Proposal # : Proposal Period: | 00011687 (In Progress) 07/01/2018 - 06/30/2023 |
|-----|----------------------------|-------------------------------------------------------------|----------|--------------------------------------------------------|----------------------------------|---------------------------------------------------|
| 4 | General Info | Agency/Sponsor: Title: | | idosis in Zebrafish | Proposal Period: | 07/01/2018 - 06/30/2023 |
| 4 | Organization | | | | | |
| 4 | Investigators/Key Persons | Copy Budget | Versions | | | |
| 4 | Credit Split | Copy All Budge Copy Final Vers | | | | |
| 4 | Special Review | Copy Attachments | - | | | |
| | Abstract | Copy Questionnair | e | | | |
| | Science Code | | | | | |
| | Others | Copy Proposal | | | | |
| ≮_ | YNQ | | | | | |
| 4 | Proposal Roles | | | | | |
| Que | estionnaire | | | | | |
| 4 | Solicitation Information | | | | | |
| 4 | Export Controls | | | | | |
| 4 | Cost Sharing Justification | | | | | |
| | ORA Supplement | | | | | |
| | Grants.Gov | | | | | |
| | User Attached S2S Forms | | | | | |
| | | | | | | |
| 1 | Budget | | | | | |
| 4 | Upload Attachments | | | | | |
| | Submit for Approval | | | | | |
| | Submit for Approval | | | | | |
| | Print | | | | | |
| | Delete Proposal | | | | | |
| | Copy Proposal >> | | | | | |

| Action | Exercise Example |
|------------------------------------------------|---------------------------------|
| Copy Proposal will allow the choice of what to | • Select copy budget check box, |
| copy to the new proposal, choose the elements | Copy final version only, |
| and then select copy proposal | Click Copy Proposal |

Note: Only a copy a budget if most of the information is the same.

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

Note: Be sure to "Sync" the budget rates after the budget is copied, as COEUS will not do it automatically.

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

Update your Copied Proposal elements!

- 1. Adjust the start and end dates to meet your new submission requirements, if necessary.
- 2. Verify that any copied narrative types are still appropriate.
- 3. Adjust the budget period boundaries to reflect the new dates.
- 4. Review the rate tables, syncing the rates if necessary.

Note: If you are doing a budget revision or resubmission, please make sure to change the proposal Type, Start and End Dates, the Due Dates, Original Proposal Number, in addition to any budgetary changes you need to make.

Deleting a Proposal

- 1. Enter the proposal that you would like to delete
- 2. At the bottom left, click on the tab called Delete Proposal.

NOTE: You can only delete proposals that have NOT been routed for approval. Once they have been routed, they need to finish routing all the way to the top, or it will sit in the queue forever. It is very important for tracking purposes that we route all proposals to the top, even if we put a note in the routing that this is no longer being submitted.