Coeus Lite
Proposal Development
Training Exercise Guide

Fall 2018
Contents

EXERCISE 1: CREATE A NEW PROPOSAL ................................................................. 6
EXERCISE 2: REVIEW ORGANIZATION TAB ......................................................... 8
EXERCISE 3: ADD KEY PERSONNEL ................................................................... 9
Modify Person Details .......................................................................................... 9
Certify Investigators ............................................................................................ 10
EXERCISE 4: CREDIT SPLIT ............................................................................. 12
EXERCISE 5: COMPLETE SPECIAL REVIEW TAB ............................................... 13
EXERCISE 6: ANSWER YNQ- YES, NO QUESTIONS ........................................... 15
EXERCISE 7: PROPOSAL ROLES – GRANTING ACCESS TO A SPECIFIC PROPOSAL .... 16
EXERCISE 8: SOLICITATION ............................................................................. 17
EXERCISE 9: EXPORT CONTROLS ..................................................................... 18
EXERCISE 11: UPLOAD ATTACHMENTS FOR THE PROPOSAL ......................... 19
EXERCISE 12: BUDGET SET UP ....................................................................... 21
Personnel ............................................................................................................. 21
Proposal Rates ...................................................................................................... 23
EXERCISE 13: ADD BUDGET DETAILS TO YR1 ................................................. 24
Personnel Budget ............................................................................................... 24
Equipment/Travel/Participant Trainee ................................................................. 26
Other Direct Costs Screen ................................................................................... 27
EXERCISE 14: COST SHARING ...................................................................... 29
EXERCISE 15: GENERATE ALL PERIODS FROM YOUR DETAILED PERIOD 1 BUDGET .... 31
EXERCISE 16: CREATE ALTERNATE VERSIONS OF BUDGET ............................ 33
EXERCISE 17: MODULAR BUDGETS (NIH ONLY) ............................................ 35
EXERCISE 18: ADDING A SUBCONTRACT TO BUDGET .................................... 36
EXERCISE 19: FINALIZE BUDGET ................................................................... 37
EXERCISE 21: SUBMIT FOR APPROVALS ......................................................... 39
EXERCISE 22: VIEW PROPOSAL ROUTING ....................................................... 40
EXERCISE 23: COPY OR DELETE PROPOSAL ................................................... 41
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.
   l. **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 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 not sponsored and are not 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 non-federal 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 Cancer – 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](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](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](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.

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 Coeus-Help@drexel.edu.) You will then automatically land in the General Info tab.

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Add a Subcontractor site</td>
<td>• Click Add Organization/Location&lt;br&gt;• Choose Other Organization from drop-down menu</td>
</tr>
<tr>
<td>2. Find the Organization by searching</td>
<td>• Next to “Location” click Search&lt;br&gt;• Click in the name field and type Carn*&lt;br&gt;• From results, click on the name; Carnegie Mellon</td>
</tr>
<tr>
<td>3. Save Progress</td>
<td>Save</td>
</tr>
</tbody>
</table>
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.

### Action

1. Click Employee Search to find and add the Drexel Employee who will be PI

2. Each person must have an email, and phone number. This information is auto-populated from HRIS.

3. Enter the effort put forth on this project. Divide the number of months working on a project by number of possible months.

4. Save work and the information moves to a list below

5. Follow steps above to add a Co-Investigator

### Exercise Example

1. Find your name

2. Review to determine if changes are needed

3. Example: Summer Salary 33.33%

4. Click Save

5. Employee Search for a co-worker

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.
Click Details to access the screen for Person Details:

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Review information from HRIS for accuracy</td>
</tr>
<tr>
<td>2.</td>
<td>Address Line 1: must be a location and not a department/office name</td>
</tr>
<tr>
<td>3.</td>
<td>Click add degree to add each needed degree</td>
</tr>
<tr>
<td>4.</td>
<td>Add the degree type</td>
</tr>
<tr>
<td>5.</td>
<td>Enter degree abbreviation into degree field</td>
</tr>
<tr>
<td>6.</td>
<td>Type graduation year into field</td>
</tr>
<tr>
<td>7.</td>
<td>Type school name</td>
</tr>
<tr>
<td>8.</td>
<td>Click Save</td>
</tr>
<tr>
<td>9.</td>
<td>Click Return to Investigator</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Question</th>
<th>Answer</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Z2</td>
<td>Are you currently Debarred, Suspended, or proposed for debarment or suspension?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Z3</td>
<td>Are you delinquent on any federal debt?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>H4</td>
<td>Have lobbying activities been conducted regarding this proposal?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>190</td>
<td>I certify that I have reviewed and understand the contents of the required training.</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>191</td>
<td>Do you currently have any Significant Financial Interests (SFIs)? For assistance in understanding what qualifies as a reportable SFI, the Disclosure Your Significant Financial Interest (SFI) guide can be accessed through the link provided in the &quot;more&quot; option to this question or via the Office of Research website.</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Credit Split:</th>
<th>Recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wade, Maureen C</td>
<td>20.00</td>
</tr>
<tr>
<td>3801 - Research Admin</td>
<td>100.00</td>
</tr>
<tr>
<td>Unit Total</td>
<td>100.00</td>
</tr>
<tr>
<td>Morey, Rebecca I (PI)</td>
<td>80.00</td>
</tr>
<tr>
<td>000001 - University</td>
<td>30.00</td>
</tr>
<tr>
<td>3801 - Research Admin</td>
<td>70.00</td>
</tr>
<tr>
<td>Unit Total</td>
<td>100.00</td>
</tr>
<tr>
<td>Investigator Total</td>
<td>100.00</td>
</tr>
</tbody>
</table>

**Action**

1. 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

2. 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.

**Action**

1. Click Add Special Review. Use the Special Review drop-down menu to make a selection.

2. Click Start Protocol. Protocol will automatically be listed as approval pending.

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 care and treatment be provided for certain animals bred for commercial sale, used in research, transported commercially, or exhibited to the public.

### 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 potentially harmful 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. |
Exercise 6: Answer YNQ - Yes, No Questions

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

<table>
<thead>
<tr>
<th>Question ID</th>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Is there space change on this proposal?</td>
<td>☐</td>
<td>☐</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Is the proposal a full application related to submission of a preliminary application?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Hazardous Materials are Used or Produced</td>
<td>☐</td>
<td>☐</td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Genetically Engineered organisms are Used or Produced</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>Human Anatomical Substances Are Used</td>
<td>☐</td>
<td>☐</td>
<td></td>
</tr>
<tr>
<td>62</td>
<td>Project Requires Inter-Government Review for Activities that affect State or Local Government or Possible National Security Implications</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>72</td>
<td>Have you completed the most recent annual conflict of interest disclosure through Form 1?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>82</td>
<td>If 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 reporting of your research?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>92</td>
<td>If you answered yes to Q. 8, how do you plan to mitigate the potential for the conflicting financial interests to compromise the objectivity to which the project is designed, conducted or reported?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Explanation</td>
<td>N/A</td>
<td>-----</td>
<td>----</td>
<td>------</td>
</tr>
</tbody>
</table>

**Action**

1. 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.

### Proposal Roles

<table>
<thead>
<tr>
<th>User ID</th>
<th>User Name</th>
<th>Home Unit</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>RIM26</td>
<td>Morey, Rebecca I</td>
<td>000001 : University</td>
<td>Add User</td>
</tr>
<tr>
<td>WADEM</td>
<td>Wade, Maureen C</td>
<td>000001 : University</td>
<td>Remove</td>
</tr>
</tbody>
</table>

- **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.

### Action | 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
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.

Open the Solicitation Information tab.

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Select radial to show if a solicitation is available</td>
<td>Click Yes, then Save and Proceed</td>
</tr>
<tr>
<td>2. Use search to show solicitation documentation</td>
<td>Search</td>
</tr>
</tbody>
</table>
| 3. In the window that opens choose the method the documentation is shown | • Link  
• Save and Proceed |
| 4. Copy and paste the URL link from the solicitation web page | http://www.drexel.edu/research/ |
| 5. Save work | Save |

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.

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The first question imparts the seriousness of export control questions. It is your responsibility to follow up with <a href="mailto:comp.export@drexel.edu">comp.export@drexel.edu</a> at ORA if you have any questions or are unsure about how to answer.</td>
<td>• Click Yes</td>
</tr>
<tr>
<td></td>
<td>• Save and Proceed</td>
</tr>
<tr>
<td>2. Select the necessary radial to answer each question</td>
<td>Select the yes or no radials as appropriate</td>
</tr>
<tr>
<td>3. Question 8 – List all organizations, Companies, etc. with whom you will be collaborating.</td>
<td>Carnegie Mellon</td>
</tr>
<tr>
<td>4. Question 9 – Other than the PI, what are the names of the Key Persons. Research Assistants and Students may be listed as TBA.</td>
<td>• Xi Quen</td>
</tr>
<tr>
<td></td>
<td>• Save &amp; Proceed</td>
</tr>
</tbody>
</table>
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.

---

**Action**

<table>
<thead>
<tr>
<th>1. Choose the attachment type Narrative from the drop-down list</th>
<th>Narrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Browse and upload the document</td>
<td>Browse, select a file, and click Open</td>
</tr>
<tr>
<td>3. Save progress</td>
<td>Save</td>
</tr>
</tbody>
</table>
| 4. Click on the Upload Personnel Attachments tab in the middle of the page, choose the attachment type and Person from the drop-down lists | • Biosketch  
• Your name |
| 5. Type a description of the file | Your initials Biosketch 2018 |
6. Browse and upload the document | **Browse, select a file, and click Open**
7. Save progress | **Save**

![Add Documents](image-url)
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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Appointment Type</th>
<th>Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money, Rebecca I</td>
<td>12M DURATION</td>
<td>JOBDE</td>
</tr>
</tbody>
</table>

**Personnel**

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.

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Add a TBA Graduate student stipend find and click the type of TBA to add</td>
<td>TBA – Research Assistant PHD</td>
</tr>
<tr>
<td>2. Under the field Job Code change to RA1 (the next RA added to the proposal would be listed as RA2, etc.)</td>
<td>RA1</td>
</tr>
<tr>
<td>3. Under the field base salary enter the amount of stipend</td>
<td>24,000</td>
</tr>
<tr>
<td>4. Select Save to save progress</td>
<td>Save</td>
</tr>
<tr>
<td>5. Add a TBA Undergraduate student worker</td>
<td>TBA – Undergraduate</td>
</tr>
<tr>
<td>6. Under the field Job Code change to UG1</td>
<td>UG1</td>
</tr>
</tbody>
</table>
7. Under the field **base salary** enter student monthly salary **2,100**
8. Select Save to save progress **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 allowed 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.

<table>
<thead>
<tr>
<th>Activity Type: Organized Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>F and A</td>
</tr>
<tr>
<td>Rate Type</td>
</tr>
<tr>
<td>On Off Campus</td>
</tr>
<tr>
<td>MTDC Off</td>
</tr>
<tr>
<td>MTDC On</td>
</tr>
</tbody>
</table>

👀 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.

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>If submitting a proposal where 10% is the only allowable IDC rate select the appropriate F and A rate field and enter that rate. Then Save.</td>
<td>MTDC On Campus: 10.0</td>
</tr>
</tbody>
</table>
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 Add Person to add the personnel who must be included in the budget from the pick-list of personnel you previously created on the Personnel screen.

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:
<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Find your Co-Investigator and use the drop-down menu to select salary type based upon the appointment type</td>
<td>2011 Faculty 12/12</td>
</tr>
<tr>
<td>2. Under period use the drop-down list to select the time period that they will spend working on the project</td>
<td>Calendar</td>
</tr>
<tr>
<td>3. Enter the % charged and % effort. These should be the same unless the department will cost share effort.</td>
<td>50%</td>
</tr>
<tr>
<td>4. Find yourself and use the drop-down menu to select salary type based upon the appointment type</td>
<td>2070 Summer Salary</td>
</tr>
<tr>
<td>5. Under Period use the drop-down list to select the time period that they will spend working on the project</td>
<td>Summer</td>
</tr>
<tr>
<td>6. Enter the % charge and % effort. These should be the same unless the department will cost share effort</td>
<td>33.33%</td>
</tr>
<tr>
<td>7. Update the start and end date to reflect the three months that comprise the summer, so that months calculate correctly</td>
<td>07/01/2018-09/30/2018</td>
</tr>
</tbody>
</table>
| 8. Research Assistant -PhD, select salary type Research Assistant Salary, choose the period of work and enter % charge and % effort | • 2420 Research Assistant Salary  
• Calendar  
• 100% |
| 9. For the undergraduate student, select salary type Student Salary, choose the period of work and enter % charge and % effort | • 2450 Undergraduate Student Salary  
• Calendar |
• 25% effort and 25% charged

10. Select save to keep progress

Save

**Period**

<table>
<thead>
<tr>
<th>Period</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td>The nine-month academic year, September 1 – May 31</td>
</tr>
<tr>
<td>Calendar</td>
<td>The 12-month calendar year</td>
</tr>
<tr>
<td>Summer</td>
<td>The three-month summer period, June 1 – August 31</td>
</tr>
</tbody>
</table>

**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.

**Action**

1. Click on the Equipment tab. Use the drop-down menu to select the **type** of expense.

**Exercise Example**

Software/ Computer Equipment > $5,000
2. Enter descriptions – the description from Equipment page will print to your budget submission form

3. Funds requested – enter the amount to request

4. Save progress

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 [Add Direct Costs](#) 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.

---

**Action**

1. Use the drop-down menu to select the type of expense

2. Enter a description of what the money will be used for

3. If all of the tuition is requested of the sponsor, enter the amount in funds requested

**Exercise Example**

4514 PhD Tuition Remission and Fees

PhD Student Tuition

Enter 22,000
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Enter another line of expense in the budget</td>
<td></td>
<td>Click Add Direct Costs</td>
</tr>
<tr>
<td>5. Use the drop-down menu to select the type of expense</td>
<td></td>
<td>Tuition: Graduate</td>
</tr>
</tbody>
</table>
| 6. If some or all of the tuition will be cost shared choose edit, a new window will appear where cost to the sponsor and cost sharing amounts can be entered (be sure the window is not blocked by a pop-up blocker). If cost sharing will be shown to sponsor click check box. |   | • Edit  
• 11,500 cost sharing |
| 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.

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.

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Navigate to the Cost Sharing Distribution of the budget</td>
<td>Click Cost Sharing Distribution</td>
</tr>
<tr>
<td>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)</td>
<td>6301</td>
</tr>
</tbody>
</table>
| 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 |
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
--- | ---
1. Navigate to the Cost Sharing Justification in the Proposal section | Click Cost Sharing Justification
2. Answer Cost Sharing questions, selecting the appropriate radial button | No
3. Enter explanation for Cost Sharing if prompted | • Cost Sharing per agreement with ORA from 11/1/2018
 | • Save
Exercise 15: Generate All Periods from your Detailed Period 1 Budget

Once you have entered all the recurring expenses required for your Period 1 budget, use the Generate All Periods 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.

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. Generate All Periods first, then enter that line item in the appropriate period(s).
- Prior to using Generate All Periods, review the Proposal Rates 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 Edit next to a line item, and the Line Item Details 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 **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.

2. 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.

3. A confirmation message will be displayed.

4. 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.

5. Now you can go back and add more expenses to later years or modify those that generated automatically.

<table>
<thead>
<tr>
<th><strong>Action</strong></th>
<th><strong>Exercise Example</strong></th>
</tr>
</thead>
</table>
| 1. Go to the Equipment tab. Modify budget to remove equipment from future years. | • Use the top tabs to navigate years  
• Select remove to delete the equipment |

<table>
<thead>
<tr>
<th>Period</th>
<th>Period Totals</th>
<th>Budget Equipment - List items and dollar amount for each item exceeding $5000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period 1</td>
<td>Direct Cost: $72,525.00</td>
<td>6310 Software/Computer Equip Exp &gt;$</td>
</tr>
<tr>
<td>Period 2</td>
<td>Indirect Cost: $0.00</td>
<td>Computer Server</td>
</tr>
</tbody>
</table>
Exercise 16: Create Alternate Versions of Budget

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

You can create alternate budget scenarios:

- Click the Add New Version link to create with a new budget version not based on the existing one.
- Click Copy 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 Budget Versions screen will open each time you navigate to the budget. You must then click Open to the right of the Budget Version you wish to view or edit.

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy the existing budget</td>
<td>• Select copy,</td>
</tr>
<tr>
<td></td>
<td>• Choose copy period 1 only</td>
</tr>
</tbody>
</table>

Action Example: Copy the existing budget

Exercise Example:
- Select copy,
- Choose copy period 1 only
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 **Budget Versions** 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 **Open** to the right of that version.

You can mark the budget as **Complete** and **Final** either on the **Budget Versions** screen, or on the **Budget Summary** screen, but only the **Budget Versions** 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 Sync with Detailed Budget 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.

Action

1. Open the Modular Budget tab. Update the modular budget page by selecting sync with detailed budget.

Exercise Example

Sync

2. If the costs are not correct edit the Direct Cost less Consortium F&A 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 Other Direct Cost navigate to that option under Budget Periods and select the first year that the Subcontract appears by using the Period tabs.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>4516 Tuition: Graduate</td>
<td>PhD Graduate Student Tuition</td>
<td>$22,000.00</td>
</tr>
<tr>
<td>4516 Tuition: Graduate</td>
<td>PhD Graduate Student Tuition</td>
<td>$11,000.00</td>
</tr>
<tr>
<td></td>
<td>PhD Graduate Student Tuition</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Action**

<table>
<thead>
<tr>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Modify the Budget Other Direct Costs screen by selecting Add Direct Costs, this will present a new line item</td>
</tr>
<tr>
<td>Add Direct Costs</td>
</tr>
</tbody>
</table>
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

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
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.

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

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

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 Certify all Investigators.
- Mark your budget as Final and Complete on the Budget Summary or Budget Version screen
- Navigate to the budget tab and select Validate;
- Respond to any errors displayed – by making the necessary corrections.

<table>
<thead>
<tr>
<th>Action</th>
<th>Exercise Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Return to Proposal. Once the proposal has passed all validations,</td>
<td>Click Submit for Approval</td>
</tr>
<tr>
<td>it will be possible to submit the proposal for departmental, school</td>
<td></td>
</tr>
<tr>
<td>and university review, click Submit for Approval from the left menu</td>
<td></td>
</tr>
<tr>
<td>2. The proposal will be validated, when validations pass, click OK</td>
<td>Click OK</td>
</tr>
</tbody>
</table>

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 Waiting for Approval shows that the proposal is within that person’s inbox, so they would be the necessary person to contact.

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.

**Action**

Copy Proposal will allow the choice of what to copy to the new proposal, choose the elements and then select copy proposal

- Select copy budget check box,
- Copy final version only,
- 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 My Proposals 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.