

Business Process: Coeus Proposal Development Module

This Business Process will be used by Principal Investigators who are transferring a grant from another institution to UMB.

1. Work with ORD to obtain Sponsor guidelines for transfers.
2. Work with Department Administrator to obtain an Affiliate ID, if the transfer application is being processed prior to PI's date of appointment. Work with Department Administrator to be set up as a Coeus User.
3. Create a new proposal record in the Proposal Development Module in Coeus by entering proposal title, start and end dates of the performance period, proposal type, activity type, and sponsor. (If sponsor does not exist in Coeus, PI/Administrator will need to fill out the "Request New Sponsor" form and submit to ORD via the UMB Coeus Website. Until notification is received from ORD, leave the sponsor field blank.) Enter the Sponsor on the Proposal Detail tab when available but prior to submission for approval. *[NOTE: At this point and throughout the process, the record may be saved and the proposal continued later.]*
4. Complete Proposal Detail, Organization, Investigator, Key Person, and Special Review Tabs
5. Complete the budget. If the detail budget is to be included in the paper copy of the proposal, then the following major categories must be completed in the Coeus Budget: Total Salary Costs, Total Fringe Costs, Total Consultant Costs, Total Equipment Costs, Total Supplies Costs, Total Travel Costs, Total Patient Care Costs, Total Other Expenses, Subcontract Direct Costs, and Subcontract F&A Costs.

If no detailed budget is to be included in the paper copy, the Coeus Budget must include the level of detail required by the Sponsor, and at a minimum the following must be included: All personnel detail, Equipment, Patient care costs, Subcontract direct cost, and Subcontract F&A. F&A must be calculated in accordance with Sponsor's policies. ORD will provide guidance regarding questions on rates.

5. Upload the proposal into the Narrative module. The entire proposal that will be submitted to the sponsor must be scanned and uploaded at Narrative type, "Narrative".
6. Answer Yes-No Questions.
7. Notify ORD that proposal is available for pre-review.
8. Preparation for "Submit for Approval"
 - a. Change/correct proposal as appropriate pursuant to ORD review
 - b. Certify the PI(s); print, scan and upload the signed/dated certification in the Narrative module at Narrative Type "Signed Certification"
 - c. For applications submitted prior to the PI's date of appointment at UMB, attach a PI Eligibility Waiver memo in the Narrative module at Narrative Type "Other Internal Documents"
 - d. For proposals involving UMB personnel not in the Lead Unit, Lead Unit Administrator will:
 - i. Identify participating (collaborating) departments other than the Lead Unit.
 - ii. Add the department administrators (preferred) or chairs as Viewers
 - iii. Notify the added Viewers and request their review and approval (provide a deadline)
 - iv. Obtain emails to document approvals
 - v. Create pdf(s) from the email(s) and upload to the Narrative module at Narrative Type "Participating Dept Approvals"
 - e. For proposals with cost sharing other than over-salary-cap, complete the cost sharing approval form and upload to the Narrative module at Narrative Type "Cost Share Form" for review and approval.
9. Principal Investigator submits for approval through the routing process.
10. If any part of the Narrative was in draft form at the time the application was Submitted for Approval, replace previous version with the final copy of the entire scanned application in the Narrative module.
11. If ORD signature is required on the hard copy, submit paper copy to ORD.
12. ORD Reviews

- a. If proposal is acceptable, ORD approves in Coeus, signs the face page of the paper copy, provides a cover letter if needed, and notifies department administrator that the application is ready for pickup
 - b. If proposal is not acceptable:
 - i. ORD notifies PI and department administrator that changes need to be made to the application.
 - ii. PI and department upload the revised application to the Narrative section, notify ORD that this has been done, and supply new hard copy application if signature is required.
 - iii. ORD approves application in Coeus, signs the face page of the paper copy, provides a cover letter if needed, and notifies department administrator that the application is ready for pickup.
13. The PI and Department Administrator are responsible for duplicating the application as required and for submitting the application to the Sponsor.