

Business Process: Coeus Proposal Development Module

This Business Process will be used by all Principal Investigators and Department Administrators who route an application through Coeus when the application is being submitted through an Electronic System other than Grants.gov (examples include but are not limited to: Proposal Central, NASA NSPIRES, American Heart Association)

1. Obtain Sponsor guidelines and provide ORD with the instructions and submission website information.
2. Create a new proposal record in the Proposal Development Module in Coeus by entering proposal title, start and end dates of the performance period, activity type, and proposal type. Enter the Financial Department that will oversee financial management of the grant or contract if awarded, and may be different from the PI's appointment unit. Enter the Sponsor. If Sponsor does not exist in Coeus, complete and submit the "Request New Sponsor" form. 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.
3. Complete the Organization tab. List all performance sites (including subrecipients) and estimate the "% Work Done" for each location. *[NOTE: At this point and throughout the process, the record may be saved and the proposal continued later.]*
4. If you are not the PI, go to Edit – Proposal Roles and add the PI as an Aggregator.
5. Complete Investigator, Key Person, and Special Review Tabs. Enter the Principal Investigator on the Investigator tab and other investigators and key persons on the Key Person tab.
6. From the Budget Module, select the OH Rate Type and when required change the applicable rate in accordance with Sponsor policies. Enter the budget showing, at minimum, direct and indirect costs for each project year. While a detailed budget is not required to be entered in Coeus, remember that the level of detail entered in the proposal will be copied to the award if the proposal is funded. It is always recommended that equipment and subcontract costs be broken out. F&A must be calculated in accordance with Sponsor's policies.
7. Upload the proposal into the Narrative module. The entire proposal that will be submitted to the Sponsor (technical plan may be in draft form) must be scanned and uploaded to the "narrative" placeholder.
8. Answer Yes-No Questions.

9. Notify your team in ORD that the proposal is available for pre-review. If any hard copy signature is required, provide the signature document to ORD.
10. Prepare to "Submit for Approval"
 - a. Change/correct proposal as appropriate pursuant to ORD review
 - b. For proposals involving UMB personnel not in the Lead Unit, identify participating (collaborating) departments other than the Lead Unit and obtain approvals in accordance with your school's instructions.
 - c. 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.
 - d. Principal Investigator certifies (on Investigator tab) and submits for approval.
 - e. Once technical section is final, replace previous version with final copy of the entire application, preferably as a PDF document, in the Narrative module.
11. ORD Review
 - a. If proposal is acceptable, ORD approves in Coeus, notifies the PI that the application will be submitted using the Sponsor's electronic system, and submits the application upon PI's positive response to ORD
 - 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 and notify ORD that this has been done.
ORD approves application in Coeus and notifies the PI that the application will be submitted using the Sponsor's electronic system.
 - iii. Upon receipt of PI's notification that entire proposal is final, ORD submits proposal via Sponsor's electronic system.
12. If Sponsor requires an ORD signature on the application for electronic submission or subsequent hard-copy submission, ORD will contact the PI/department upon signing the document. The signed document is uploaded as part of the Final Narrative. The PI and Department Administrator are responsible for any hard copy submission required by the Sponsor.