

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 to the Sponsor via Grants.gov

1. Identify Funding Opportunity Announcement (FOA) outside of Coeus, via Grants.gov or agency search engine.
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. On the Proposal Details screen enter the Funding Opportunity Number. From the main menu go to Action → Grants.gov to link proposal to Grants.gov
5. If you are not the PI, go to Edit → Proposal Roles and add the PI as an Aggregator.
6. 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.
7. Complete the budget using a detailed or modular budget in accordance with agency instructions. If applicable (for detailed budget), upload subaward budget as an Adobe Forms file obtained from the UMB Coeus Website.
8. Upload Narratives as required by the FOA.
9. Answer Yes-No Questions.
10. On the Grants.gov Submission Details screen, Forms tab, ensure that appropriate forms and narratives are "included".

11. On the Grants.gov Submission Details screen, click "Validate" and make any necessary corrections until the message "All validations passed successfully" appears.
12. Notify your team in ORD that proposal is available for pre-review.
13. 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.
14. Upload final narrative attachments and notify ORD that proposal is ready for final review and submission.
15. ORD reviews
 - a. If proposal is acceptable, ORD approves in Coeus and submits to Grants.gov through Coeus
 - b. If proposal is not acceptable:
 - i. If changes are required to Narratives, ORD notifies PI or other Aggregator and PI or other Aggregator uploads revised attachment(s). ORD approves in Coeus and submits to Grants.gov through Coeus
 - ii. If changes other than narrative attachments are identified that must be corrected prior to submission, ORD rejects proposal with comments.
 - iii. Department makes corrections and notifies ORD
 - iv. An ORD Director, at his/her discretion, may bypass all approval steps prior to ORD
 - v. An ORD Contract & Grant staff member approves in Coeus and submits to Grants.gov through Coeus
16. From the Grants.gov Submission Details screen, Submission Status tab, ORD and Department check Grants.gov status in Coeus, using the Refresh button to update information.
17. **For agencies other than NIH**, check agency instructions regarding communications and corrections after submission

18. **For NIH:**

- a. ORD and PI will receive email from NIH Commons.
- b. If application has no Errors, ORD and PI review the assembled application in NIH Commons
- c. If application has Errors, resubmission is required:
 - i. Go to Development Proposal List
 - ii. Highlight the line for the submitted proposal that contains an Error
 - iii. Create copy of proposal, including final budget and narratives
 - iv. On Proposal Details tab, link the submitted Original Proposal
 - v. Link to Grants.gov
 - vi. In Grants.gov screen, change Submission Type to "Changed/Corrected Application"
 - vii. Correct Error(s)
 - viii. Make sure all Narrative modules are listed as Complete
 - ix. Choose a final budget and mark the budget as Final and Complete. Check "Modular" if applicable.
 - x. Certify the Investigator(s)
 - xi. Answer the Yes/No Questions
 - xii. In the Grants.gov screen Forms tab, ensure all appropriate forms are "included"
 - xiii. From the Grants.gov screen, click Validate and make any needed corrections.
 - xiv. Continue with Step 13.d, "Submit for Approval"
 - xv. An ORD Director, at his/her discretion, may bypass approvals prior to ORD
 - xvi. An ORD Contract & Grant staff member reviews, approves in Coeus and submits to Grants.gov through Coeus.
 - xvii. ORD updates status of prior (linked) proposal to "Deactivated" in Institute Proposal.