

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 as a Paper Copy. In addition, this process will be used for routing agreements such as Professional Service Agreements (PSAs) and Interagency Personnel Assignment (IPA) Agreements.

1. Obtain Sponsor guidelines and provide them to ORD if non-routine.
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, proposal type and activity 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 and, when applicable, the Prime 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 the 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. 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 attached.
8. Answer Yes-No Questions.
9. Notify your team in ORD that the proposal is available for pre-review.
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 and obtain signatures on the cost sharing approval form and upload to the Narrative module at Narrative Type "Cost Share Form" for review and approval.
11. Principal Investigator certifies (on Investigator tab) and submits for approval.
12. If ORD signature is required on the hard copy, submit paper copy to ORD.
13. Once the program/technical section is final, replace previous version with the final copy of the entire application or agreement, preferably as a PDF document, in the Narrative module.
14. ORD Review
 - a. If proposal is acceptable, ORD signs the paper copy when required, provides a cover letter when required, and notifies department administrator that it 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 signature document if required.
 - iii. ORD signs as required and notifies department administrator that it is ready for pickup.
15. The PI and Department Administrator are responsible for duplicating the application as required and for submitting the application to the Sponsor.

16. PI and/or Department Administrator uploads the final version of the application, including all signatures, to the Narrative Module and informs ORD. NOTE: The application will continue to have the status of "Approval In Progress" until ORD has verified that the final version of the application is attached in Coeus.

17. ORD approves application in Coeus.