

**Business Process:
Coeus Proposal Development Module**

This Business Process will be used by all Principal Investigators and Department Administrators who will submit 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, NIH eSNAP, 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, proposal 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.]*
3. Complete Proposal Detail, Organization, Investigator, Key Person, and Special Review Tabs.
4. Complete the budget. If the detail budget is to be included in the forms submitted electronically, 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, but 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.

5. 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.

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 proposals involving UMB personnel not in the Lead Unit, Lead Unit Administrators 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
 - d. 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. Once technical section is final, replace previous version with final copy of the entire scanned application in the Narrative module.
11. ORD Reviews
 - a. If proposal is acceptable, ORD approves in Coeus, notifies the PI that the application will be submitted using the other electronic system, and submits the application upon PIs 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 application to the Narrative section and notify ORD that this has been done.

- iii. ORD approves application in Coeus and notifies the PI that the application will be submitted using the other electronic system.
- iv. Upon receipt of PI's notification that entire proposal is final, ORD submits proposal via sponsor's electronic system.