

# Coeus Users Group

## February 13, 2008

### Topics and discussion

#### **Institutional Base Salary and Salary Cap**

Dennis Paffrath clarified that the actual IBS (not the Salary Cap) is required for the Base Salary field on the 424 form. As such, the requested salary is based on the actual IBS, not the salary cap.

Discussion ensued, as this is a change from accepted business practice where applicants have been permitted to show the IBS, but calculate on the salary cap.

The issue is that NIH requires the IBS in that Base Salary field. In Coeus, this is the “Calc Base” on the Budget Persons screen (“running man” icon). Coeus can only calculate on the “Calc Base” Salary to properly populate the Detailed Budget Form.

In the event that there is a limit on the total direct costs that may be requested for a proposal, two options were provided:

- 1 – use the IBS as usual. Include an explanation in the cover letter to the effect that when the salary cap is applied to the budget, the total direct costs will be less than the limit/cap.
- 2 – use current Salary Cap in the Base Salary field but include in the budget justification a statement that the investigator’s salary is above the cap. This would be the ONLY exception permitted to the required use of IBS as the Base Salary.

For more information, review the salary cap information on the Coeus “What’s New” page, <http://www.umaryland.edu/coeus/latestinfo.html>. This information was originally posted 1/22/08 and will be updated to include the cover letter option and other clarifications.

#### **Budget Creation – Begin and End Dates**

Dennis advised that Users be aware when entering project begin and end dates that an extra project period of one day will be added if the project period is entered incorrectly. For example, a project period of one year would be July 1, 2007 to June 30, 2008. If you enter July 1, 2007 to July 1, 2008 as your project period, Coeus will generate an extra one-day period for the budget.

This doesn’t mean that you can’t have project periods of more or less than one year to meet the requirements of sponsor instructions or an agreement period.

Also – be sure that the dates on the Proposal Detail page match the dates on the Summary Budget page. If you modify the dates on the Proposal Detail page, the dates on an existing budget are not updated automatically.

#### **REMINDER – Please allow the Dean’s Office and ORD to pre-review your proposal**

Both Sue Hobbs and Dennis requested that Users notify the Dean’s Office and ORD when an application is ready for pre-review, and then wait for responses from BOTH offices before the investigator “submits for approval”. Pre-review allows these offices to request corrections or missing documents and to make corrections such as IRB or IACUC approval dates while the proposal status is “in progress”. After the proposal is submitted for approval and the status is “approval in progress”, the proposal must be rejected if a correction is needed or a document attachment is missing. We all want to minimize rejections! Other than updating of narrative attachments prior to approval, changes to the proposal data, budget, and biosketches can only be made if the proposal status is “in progress” or “rejected”.

## **QUESTION AND ANSWER – What does Coeus “validate”?**

There are two Validations in Coeus. From the main menu, Action -> Validation Checks validates on Coeus requirements, so that you can ensure that all the required fields have been completed, the PI has certified, Yes-No questions are completed, etc. prior to submitting for approval. From the main menu, Action -> Grants.gov and then clicking the Validate button allows Coeus to validate on Grants.gov requirements, including the DUNS number. It will also verify that biosketches are attached for all investigators and key persons and verify that fields are completed on the forms to be submitted to the agency. However, Coeus does not provide a full validation for agency-specific requirements.

## **TIPS**

Dennis requested that Users get in the habit of using only PDF format for Narrative Attachments. For some reason, even if you click the Adobe icon to upload a PDF file, Coeus is allowing either PDF or Word files to be attached. In addition, PDF files are more stable and will not change fonts, change pagination, or reveal tracking of edits when opened by another person or received by the agency.

One User advised that folks also get in the habit of checking the number of pages and general format of PDF files created from Word or other applications. He had a PDF file that had somehow been reformatted in the conversion process and exceeded the page limit as a result.

Dennis reminded everyone to use the checklist of Narrative attachments that is available on the Coeus website under Proposal Toolkit at <http://www.umaryland.edu/coeus/tools.html>. This will minimize attachments that are on the wrong Narrative Type and will minimize the chance of a missing attachment. It is designed for R01 grants, but many of the attachments (and the corresponding Narrative Type) are the same for other mechanisms.

Janet Simons advised that, pursuant to the last User Group meeting, instructions for “archiving” a biosketch and degree information for an investigator are on the website under “What’s New” (the information will be added to the Proposal Toolkit and FAQs soon). When the archived information is available, Coeus will offer to “synchronize” the archived biosketch when the investigator is added, and the degree information will be part of the record.

## **Final Cost Sharing and Participating Department forms**

Janet reported that the suggestions made by Users at the December meeting have all been incorporated in the forms and instructions. *ERRATA*: Janet stated that the Participating Department form itself needed to be uploaded regardless of whether signatures are gathered electronically or on the form. This is incorrect. The form is required if a signature is going to be provided via hard copy for some reason. It is also required if the Lead and Participating departments wish to document their agreement for DRIF allocation. Instructions on the form and on the website will be corrected/clarified. The forms will be available on the Proposal Toolkit page of the Coeus website, and on the Forms page of the ORD website, as well as at “What’s New”.

## **REVISED Business process for routing a hard-copy proposal in Coeus**

Amanda Snyder reported that, now that several units have routed proposals in Coeus that are submitted to the Sponsor in hard copy, the business process has been updated to reflect reality. In addition, the portion of this process related to participating department approvals has

been updated (and will be updated on the other processes as well). Look for the revised process on the Proposal Toolkit page within a few days.

### **SOM update on new users**

Sue Hobbs reported that the newest units to come “on line” with Coeus are being trained and are entering their first proposals. She announced the units that will begin using Coeus over the next few months, with everyone getting started by September. See Sue Hobbs for the schedule for your unit. For information about roles in Coeus and recommended training, please review: <http://www.umaryland.edu/coeus/roles.html>

### **Data migration update**

Marjorie Forster reported that ORD and CITS have been working together to stay on schedule and resolve problems or glitches as they come up. The migration of proposal and award data from legacy systems to Coeus is scheduled for February 22-24. Coeus will not be available to Users during this period.

### **Reporting of Coeus data**

Reports are going to be available to the campus via RAVEN. Doug Bowser described the activities of the Coeus Reporting Working Group, which includes department representatives working on the content and format of these reports. Two meetings have been held so far to discuss design and format of the tables. The intent is that there will be at least as much information provided as is currently available via Crystal reports. Doug stated that the “look and feel” of the Coeus RAVEN reports will be different from those for eUMB. In the longer term, the CITS group is working toward incorporating information from other systems within the same reports (e.g., effort information from Maximus).

### **USER ADVICE**

A department administrator for a department with a number of divisions advised that the PI needs to create a new proposal in Coeus. The Lead Unit for the proposal is derived from the person who creates the proposal. So...if the administrator’s department unit (eUMB department code) is not the same as that of the PI, then the PI will need to create the proposal “shell”.

### **USER CONCERN – F&A rate**

A User tried to apply the rate permitted by a Sponsor, and Coeus would not allow the rate to change – it kept applying the standard MTDC rate. **ORD WILL TEST**  
Sue Hobbs addressed the issue of on/off campus rates. The default in Coeus is for the ON CAMPUS F&A rate. The off-campus rate must be indicated on each Cost Element. The off-campus rate box must be clicked for Personnel line items before any proposal persons are added to the cost element. Only one rate may be used for a proposal, in accordance with our negotiated F&A rate agreement. If the off-campus rate applies, be sure all cost elements have been addressed.

**NEXT MEETING:** Wednesday, March 12, 1-3 PM, HSF II Auditorium