SPA/SPAC Updates
2nd Quarter 2014

May 22, 2014
2:30 – 4:00 pm
HSF-II Auditorium
Today’s Agenda

• SPAC Personnel Changes
• Staff moves in SPA
• Coeus Reminders
• NIH Reminders and Announcements
• Kuali Coeus Implementation
SPAC Personnel Changes

• Team Staff Yellow
  – Carolina Castro has moved out of SPAC

• Coverage until replacement/Red Team
  – Med General Internal Medicine 10408080
  – Med Nephrology 10408130
  – Med Rheumatology 10408150
  – Diagnostic Radiology 10403000
SPAC Personnel Changes

• Coverage until replacement/
  – Med Chairman Office Davis  10408011
  – Med Cardiology  10408050
  – Med Infectious Disease  10408120
  – Med Pulmonary  10408140
  – Family Medicine  10406000
Coeus Reminders – Viewing and Printing Grants.gov Forms

• Go to Action → Grants.gov
• Select the “Forms” tab
• Highlight the form(s) you wish to print
• Click Print
• Coeus generates a pdf of your forms, including attachments
• Note: Attachments could be out of order in the generated pdf, but will transmit to the sponsor in the right order
Action → Grants.gov
Select the “Forms” tab
Highlight the form(s) you wish to print
Click Print

Coeus generates a pdf of your forms, including attachments
First page is Grants.gov Form
Any pdf attachments follow Form page
Signing and Administrative Officials on NIH RPPR

- **Please** make sure that your PIs choose someone from your **SPA** team as the Administrative and Signing Officials in their RPPRs

- When left blank, RPPR defaults to first person on the list of officials who happens to be in SPAC, not in SPA.

- We are concerned that an RPPR notification could get lost or delayed because the appropriate official is not selected to receive the notification email.
Coeus to Kuali Coeus Transition

• **Kuali Coeus:** Web-based enhancement of Coeus

• Part of Kuali’s suite of open source enterprise software developed for universities, by universities

• **Go Live:** July 1, 2014

• **PLANNED DOWNTIME** – both Coeus and Kuali Coeus will be unavailable June 23-30
Transition of Proposals and Other Data

• **Recommended**: Prepare proposals in Coeus and leave “in progress”
  – Route for approvals and submit via Kuali Coeus

• Coeus data will be available in Kuali Coeus
  – We will migrate proposals, institute proposals, negotiations, awards, and subwards from Coeus into Kuali Coeus
User Data Clean Up

• Please review your department users:
  – From the Main Menu, select Admin > Unit Hierarchy
  – Locate and select the folder for your department
  – From the menu, select Action > User Maintenance
  – Click on the “username” column header to sort alphabetically

• Let Janet Simons know if there are people who should no longer be listed for your department:
  – Email jsimons@umaryland.edu
  – Include the Department Code and the full names of the people to be inactivated from your department
Kuali Coeus - Training

• Delta Training sessions for current Coeus users:
  ◆ Tuesday, 6/10, 1:00 – 3:00 pm, SOD Room G205
  ◆ Thursday, 6/19, 1:00 – 3:00 pm, SOP Room N-111
  ◆ Monday, 6/23, 10:00 – noon, HSF II Room 600
  ◆ Wednesday, 6/25, 10:00 – noon, SOL Room 108

• Sessions will cover:
  – Exciting new features in Kuali Coeus
  – Key differences between Coeus and Kuali Coeus
Kuali Coeus Training (Continued)

- Approver tutorials available in June
- Training for viewers will be available in June (Institute Proposal, Award, Subcontract Modules)
- Tutorials, checklists, etc. will available on the SPA Kuali Coeus Website
- We hope to have a Kuali Coeus “sandbox” for the campus to explore
- New user training will be available after Go Live
What doesn’t change with the move from Coeus to Kuali Coeus?

• Overall business processes are the same
  – Still route the same types of actions
• The functionality is the same as in Coeus
  – For example, we are still submitting System to System federal proposals
• The data collected in Kuali Coeus is the same data you are already entering into Coeus
  – Many fields even have the same names
Proposal Development
Budget
New (cool) features

• In application Help icon
• All info on the screen, not in separate menus (like Action → Grants.gov)
• Proposal Summary
  – Easy way for approvers to review the proposal
  – High-level review that allows user to drill down for additional details, as desired
• Validations
  – Data validation feature in proposal and budget
  – Shows errors and warnings AND provides a button that takes you right to the tab in the proposal that needs to be corrected
## Proposal Summary

- Document was successfully saved.

### Proposal Information

<table>
<thead>
<tr>
<th>Title</th>
<th>Test - Test - Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Investigator</td>
<td>Harry Potter</td>
</tr>
<tr>
<td>Lead Unit</td>
<td>10101000 - SOM Office of the Dean</td>
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<tr>
<td>Activity Type</td>
<td>Research</td>
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<table>
<thead>
<tr>
<th>Project Start Date</th>
<th>12/01/2014</th>
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</thead>
<tbody>
<tr>
<td>Project End Date</td>
<td>11/30/2017</td>
</tr>
<tr>
<td>Sponsor</td>
<td>National Institutes of Health</td>
</tr>
<tr>
<td>Sponsor Deadline Date</td>
<td>07/07/2014</td>
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<tr>
<td>Include Subaward(s)?</td>
<td>No</td>
</tr>
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</table>

### Budget Totals

<table>
<thead>
<tr>
<th>Total Direct Cost</th>
<th>Total F&amp;A Costs</th>
<th>Total Cost</th>
<th>Cost Share</th>
<th>Underrecovery</th>
<th>Program Income</th>
<th>F&amp;A Rate Type</th>
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</thead>
<tbody>
<tr>
<td>$148,167.10</td>
<td>$68,034.38</td>
<td>$216,201.48</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>MTDC</td>
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</table>

### Budget Summary

<table>
<thead>
<tr>
<th>Period</th>
<th>Start Date</th>
<th>End Date</th>
<th>Direct Cost</th>
<th>Indirect Cost</th>
<th>Underrecovery</th>
<th>Cost Sharing</th>
<th>Total Cost</th>
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<tbody>
<tr>
<td>1</td>
<td>12/01/2014</td>
<td>11/30/2015</td>
<td>$45,142.42</td>
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<td>2</td>
<td>12/01/2015</td>
<td>11/30/2016</td>
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<td>3</td>
<td>12/01/2016</td>
<td>11/30/2017</td>
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<td>$73,999.66</td>
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</table>

<table>
<thead>
<tr>
<th>F &amp; A Rate Type</th>
<th>On Campus</th>
<th>Fiscal Year</th>
<th>Start Date</th>
<th>Institute Rate</th>
<th>Applicable Rate</th>
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<tbody>
<tr>
<td>MTDC</td>
<td>No</td>
<td>2009</td>
<td>07/01/2008</td>
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<td>MTDC</td>
<td>Yes</td>
<td>2012</td>
<td>07/01/2011</td>
<td>53.50</td>
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</tbody>
</table>

### Budget Reports

- Key Personnel (1)
- Custom Data Information
- Questions
- Validations
- Print
Validation

You can activate a Validation check to determine any errors or incomplete information. The following Validation types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov

Validation Errors

- Key Personnel Information (1)
  The Investigators are not all certified. Please certify Harry Potter.

- UMB Required Questionnaire (1)
  You must complete the questionnaire "UMB Required Questionnaire"

Warnings
Questions?
Final Notes

• Both presentations will be available on SPA and SPAC websites

• Quarterly Meetings for 2014:
  – August 28th, 2:30 – 4:00, Location TBD
  – November 20th, 2:30 – 4:00, Location TBD

• Thanks for joining us today!