CoeusLite 4.4.2
Proposal Development
User Guide

Coeus® Version 4.4.2

Web-based application for preparing, routing, and submitting proposals
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Accessing CoeusLite Proposal Development:

Contact your university Coeus administrator to establish your Coeus User ID and assign the Coeus proposal creator role in your unit.

Your Coeus Administrator will provide you with the URL address where you will access the software. You may also need valid certificates to access your university’s Coeus website.

Click on My Proposals to access Proposal Development
Overview of Screen Navigation:

The default view upon entry to My Proposals is Proposals in Progress.

- Proposals In Progress displays any non-approved proposal that you have access to view or modify.
- All Proposals displays the list of all Proposals (in progress, approval in progress, submitted, etc).
- Create New Proposal starts a new Proposal.
- Proposal Search initiates a search to locate a specific proposal.
- Grants.gov Opportunity Search connects to Grants.gov to search for a funding opportunity.

Select anywhere on a proposal in the List of Proposals displayed in the lower pane to open the proposal.

Identifying View Modes: Modify versus View Only

Open General Proposal Information: View only mode vs. Modify mode.

Red warning notes another user has a lock on this proposal. You are in View Only Mode; you cannot edit this proposal unless the other user exits.

You are in Modify Mode: you can edit this proposal. (No red warning; darker text in fields, drop down lists active)
Multiple Users in Modify Mode: Multiple users can access the proposal in modify mode: one user has access to modify the General Info and Upload Narratives screens while another user simultaneously modifies the Budget. 

Open Budget Views: Modify mode vs. View-Only mode:

Budget open in **Modify Mode**: note dark text in fields, drop-down lists active, and no red warning note.

Budget open in **View-Only Mode**: note **Red** warning, grayed-out text in fields, and drop-down lists not active.

Locating Proposals in CoeusLite

**List of All Proposals** window: will display status Submitted, Approved, Approval in Progress, In Progress, Rejected, Post-Submission Approval, Post-Submission Rejection.
List of Proposals In Progress window: displays In Progress, Approval in Progress, and Rejected status.

Proposal Search window: enter search criteria value(s) then select Search.

Use the wildcard symbol * in Coeus search screens to reduce the likelihood of typos and decrease the numbers of letters that you must type.

Result: Select proposal, search again, or close the search window.
Preview a Grants.gov Opportunity

Grants.gov Opportunity Search window: enter the CFDA Number or Sponsor Opportunity Id number to perform the search and review the results.

Review Opportunity details:

Create Proposal from the Grants.gov Opportunity Search

Use the Create Proposal option from the Grants.gov Opportunity Search results to generate a new proposal. If you choose to create a proposal from the result(s) using the Create Proposal link, you may be presented with the select a unit screen if you have the Proposal Create role in more than one unit. The Opportunity ID and CFDA number will automatically be populated on the General Info window. You will need to maintain the mandatory fields on the General Info screen to save the proposal and complete the link.
Create a New Proposal:

If you are authorized to create proposals in more than one Lead Unit, you will first be presented with your list of those units. Click on the appropriate Unit for this submission. Lead unit cannot be changed once a proposal is started. You will be able to add a unit(s) to support routing and credit split for each investigator on the Investigator Details screen.

NOTE: The Lead Unit is the primary department associated with the proposal. This is the department that will submit the proposal and manage the award, if funded.
Use the Navigation Panel buttons to navigate your proposal. Don’t use your Browser’s “back” or “forward” buttons – these functions are not supported for use in navigation in Coeus.
Navigating the CoeusLite Screens:

<table>
<thead>
<tr>
<th>Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ General Info</td>
<td>Enter specific details required to save and create a proposal. This panel will always be the first screen presented when a proposal is selected.</td>
</tr>
<tr>
<td>✓ Organization</td>
<td>Displays the contact information of the submitting organization, performing organization, and allows users to add performing sites of additional locations.</td>
</tr>
<tr>
<td>Investigators/Key Persons</td>
<td>Add Investigators and Key Persons and customize their unit, roles, contact and degree details. Certify Investigators.</td>
</tr>
<tr>
<td>Credit Split</td>
<td>Enter credit allocation specifics for Investigators as defined by your institutional business practices.</td>
</tr>
<tr>
<td>Special Review</td>
<td>Enter information for research requiring special review or approval such as use of animals or human subjects.</td>
</tr>
<tr>
<td>Abstract</td>
<td>Not used at Northeastern University.</td>
</tr>
<tr>
<td>Others</td>
<td>Institutionally defined field.</td>
</tr>
<tr>
<td>YNQ</td>
<td>Enter answers to compliance questions required by your Institute, the sponsor, or both.</td>
</tr>
<tr>
<td>Proposal Roles</td>
<td>Add or remove user access to your proposal</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>Heading for Questionnaires Locally defined and applied Questionnaires will display in this category.</td>
</tr>
<tr>
<td>PHS Fellowship required form data</td>
<td>Coeus distributed questionnaire for populating the PHS Fellowship Supplemental Form for s2s submissions.</td>
</tr>
<tr>
<td>Grants.Gov</td>
<td>Links the proposal to a Grants.gov opportunity; displays opportunity details, forms, and submission status</td>
</tr>
<tr>
<td>Budget</td>
<td>Navigates to the budget screens</td>
</tr>
<tr>
<td>Upload Attachments</td>
<td>Navigates to the file upload screens</td>
</tr>
<tr>
<td>Validate</td>
<td>Performs the locally defined validation checks and s2s validations if a Grants.gov opportunity has been selected and saved.</td>
</tr>
<tr>
<td>Submit for Approval</td>
<td>Starts Complete &amp; Validated proposals routing for internal approval</td>
</tr>
<tr>
<td>Print</td>
<td>Navigates to the print options screen to print the Grants.gov forms, generic forms, or sponsor paper-submittal forms from your Coeus proposal data</td>
</tr>
<tr>
<td>Copy Proposal</td>
<td>Allows authorized users to copy all or part of the proposal to a new proposal</td>
</tr>
<tr>
<td>Email</td>
<td>Navigates to the email notification function that allows users to generate and send email messages.</td>
</tr>
<tr>
<td>Add New Rolodex Entry</td>
<td>Create a non-Institute investigator, performing site, contact, or key person Rolodex</td>
</tr>
</tbody>
</table>
1. **Navigate to the General Info screen:**
General Info is the default view upon opening a proposal. Fields with a red asterisk (*) are required to save and generate a proposal number.

![Image of CoeusLite User Guide](image)

**A. Enter your proposal information:**

1. Fill in all (*) fields and as much of the General Proposal Information Screen as possible.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proposal Type</strong></td>
<td>Select the appropriate entry from the drop-down list. This information might be specified in the sponsor's announcement or guidelines.</td>
</tr>
<tr>
<td><strong>Activity Type</strong></td>
<td>Select the appropriate entry from the drop-down list.</td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>Date the project is expected to start. Enter in mm/dd/yy format or use the calendar tool.</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>Date the project is expected to end. Enter in mm/dd/yy format or use the calendar tool.</td>
</tr>
<tr>
<td><strong>Original Proposal Number</strong></td>
<td>Required if the Proposal Type is Resubmission, Revision or Continuation. Use the Search icon to search the Institute Proposal module.</td>
</tr>
<tr>
<td><strong>Award # (number)</strong></td>
<td>Required if the Proposal Type is Continuation, Renewal, or Revision. Leave this field blank for New, Resubmission, or Task Order. The Award # is a Coeus-generated number; to find it use the Search icon next to the field and search by Account number or other detail.</td>
</tr>
<tr>
<td><strong>Agency/Sponsor</strong></td>
<td>The sponsor is the organization that will provide funding. Enter the sponsor's six-digit code in this field or use the Search icon to find it.</td>
</tr>
<tr>
<td><strong>Prime Sponsor</strong></td>
<td>If your institution will be the subcontractor for the proposal, the prime sponsor is the agency providing funds to your sponsor. If not, leave this field blank.</td>
</tr>
<tr>
<td><strong>Proposal deadline date</strong></td>
<td>Date the proposal is due at the sponsor.</td>
</tr>
<tr>
<td><strong>Receipt/Postmarked</strong></td>
<td>Select which option defines the deadline receipt requirement.</td>
</tr>
<tr>
<td><strong>NSF Science Code</strong></td>
<td>This field will not be used by Northeastern, please leave blank.</td>
</tr>
</tbody>
</table>
### Anticipated Award Type
Select the type from the drop-down list, if known.

### Sponsor Proposal No. (number)
Required if the Proposal Type is Renewal, Resubmission, Revision, or Continuation. Search the Award module or Institute Proposal module, as appropriate, to find this number.

### * Title:
Enter the descriptive title. For electronic submission, the title should not contain any special characters. The field will support 200 characters, but some sponsors may require shorter titles. Refer to the sponsor instructions.

### Program Title:
Enter a program title provided by the sponsor. If this proposal will be submitted via Grants.gov, this field will be overwritten when you associate the proposal with a Grants.gov opportunity.

### Proposal in Response:
Select an entry from the drop-down list to identify how this funding opportunity was announced.

### Subcontract
Select this checkbox if one or more subcontracts will be included in this proposal. If there will be no subcontracts, leave it unchecked.

### Funding Opportunity Number
For paper submissions: enter data manually. For Grants.gov submissions: enter data manually, or this will be populated automatically if CFDA is used to perform the Grants.gov search.

### CFDA Number:
Catalog of Federal Domestic Assistance number assigned by sponsor for funding opportunity. For paper submissions: enter the data manually, if known. For Grants.gov submissions, enter the CFDA number to support the Grants.gov search.

**Note:** some NIH opportunities do not assign CFDA numbers until after award. Use the Funding Opportunity search for those applications and leave the CFDA field blank unless it is populated automatically by the selected Grants.gov opportunity.

### Agency Program Code:
This code is currently required only for NSF submissions. Locate the code in the announcement of opportunity, at Grants.gov, or the sponsor's web site.

### Agency Division Code:
This code is currently required only for NSF submissions. Locate the code in the announcement of opportunity, at Grants.gov, or the sponsor's web site.

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2. Select **Save**
3. **Result:** Coeus assigns the next available proposal number, which will appear in the proposal header on all CoeusLite entry screens.

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**B. For Grants.gov System-to-System (S2S) Candidates:**

To submit your proposal electronically through Grants.gov, to use the System-to-System (s2s) functionality, you must first complete several fields on the **General Info** screen:

a. required information designated by the red asterisk (*) and,

b. either the Funding Opportunity Number or CFDA Number.

Then, navigate to the **Grants.gov** screen to initiate a Coeus search of Grants.gov for the FOA or CFDA submission package.
1. Navigate to the Grants.gov screen:

Initial navigation to the Grants.gov screen links your proposal to a posted opportunity at Grants.gov. The General Info data fields for either CFDA Number or Opportunity ID (not both) must be completed in order to perform the search. A search retrieves the sponsor’s electronic submission details for the application, such as: the list of mandatory and optional forms, program title, instructions, CFDA, Opportunity ID, some validation tests, etc. required for a successful proposal submission. If all mandatory forms are available and have been successfully populated, your proposal can be submitted via Grants.gov.

   a. **Grants.gov search results** (example)

      1. Click on the **show** option in the **Details** column to view additional opportunity details and confirm selection:

      ![Grants.gov search results example](image)

      2. Click on the **Instruction URL** hyperlink to view the sponsor posted instructions, guide, or other information to aid the applicant.

      ![Instruction URL example](image)

      3. Click on **Select** to choose this opportunity and retrieve the submission requirements, or click **hide** to close the detail panel; click **show** or **Select** another opportunity;
b. Results of selecting a Grants.gov opportunity package (default view):

Sponsor-required forms are pre-checked to Mandatory & Include for this application.

Logo indicates link.

Selected opportunity details & hyperlink to sponsor posted instructions.
Grants.gov opportunity package review (continued)

1. Review list of required forms (forms must be marked Available in the Desc column if required for this s2s submission.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Mandatory</th>
<th>Include</th>
<th>Desc</th>
<th>Select to Print:</th>
<th>All Included</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFLLL V1-1</td>
<td></td>
<td></td>
<td>Available</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANA_ApplicationInfo</td>
<td></td>
<td>X</td>
<td>Not Available</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Check the optional forms to Include for this submission (see sponsor opportunity instructions).

3. Click the Save button to save the Grants.gov selected opportunity and the forms you selected to include for this submission.
c. Other Grants.gov screen functions:

- **Not active until proposal is submitted to Grants.gov**
- **Change the opportunity selected (only valid if multiple listed in one posting)**
- **Removes the opportunity; deletes Program Title; Funding Opportunity & CFDA from the General info Screen**
- **Performs validation on Select to Print checked forms**
- **Generates printable PDFs of selected forms**

- **Default Type = Application**
- **Alternates: Pre-Application and Change/Corrected**

- **Click individual boxes to select a form to print (print button at bottom of screen).**
- **Click All Included to auto-select forms previously included when Saved.**
- **Deselect by clicking None.**

- **Save the selected opportunity and forms selected.**

- **Click the Submit to Grants.gov button to complete S2S submission.**
## 2. Additional Performing Organizations or Sites

The Organization screen contains the contacts for your Institute and performing sites involved in the project.

<table>
<thead>
<tr>
<th><strong>Proposal Organization</strong></th>
<th>The legal entity for the proposal. When a proposal is created, this defaults to the organization listed in the lead unit’s organization field. This information is pre-populated.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Performing Organization</strong></td>
<td>The organization performing the main portion of the project. This will likely be the same as the Proposal Organization. This information is pre-populated.</td>
</tr>
<tr>
<td><strong>Other Organization/Location</strong></td>
<td>Other Organizations are other participants in the project, often recipients of a subcontract.</td>
</tr>
<tr>
<td><strong>Performance Site/Location</strong></td>
<td>A site where work is being done that is not an organization (e.g. a volcano, a field camp location, or other significant off campus location that should be recognized in the proposal).</td>
</tr>
</tbody>
</table>

### Proposal Organization:

<table>
<thead>
<tr>
<th>Proposal Organization</th>
<th>Location: Northeastern University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>Grupp-Patrutz Deborah</td>
</tr>
<tr>
<td></td>
<td>360 Huntington Ave., 960 RP, Boston, MA, 02115-5005</td>
</tr>
<tr>
<td>CongDist:</td>
<td>MA-006</td>
</tr>
</tbody>
</table>

### Performing Organization:

<table>
<thead>
<tr>
<th>Performing Organization</th>
<th>Location: Northeastern University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>360 Huntington Ave., 960 RP, Boston, MA, 02115-5005</td>
</tr>
<tr>
<td>CongDist:</td>
<td>MA-006</td>
</tr>
</tbody>
</table>

1. Click Add Organization /Location to create additional panels.

The **Proposal Organization** Address and Congressional District are pre-populated. The Proposal Organization cannot be removed. Use the **Remove** function to delete the supplied Congressional District. Use **Add Congressional District** function to insert a new field for the data, or multiple fields, if appropriate.

The **Performing Organization** Location can be changed, but the address will not update from the centrally maintained data. Congressional Districts can be modified.

Use the **Add Organization/Location** function to perform a search to populate the required fields.

For **Other Organizations**, the Coeus Organization Table will be searched and the returned result will include the Location, Address, and Congressional District. Users can modify the district by deleting returned result and adding a new congressional district field. Using Other Organization will support populating DUNS Number to certain sponsor forms.

For **Performance Site**, the Location field must be manually entered, the Rolodex must be searched for the Address, and then the Congressional District field must be added and typed in. Rolodex does not support providing DUNS numbers to sponsor forms. If DUNS is required for your submission, use Other Organization.
Adding an Other Organization

- Select Add Organization/Location
- Select Type: Other Organization from drop-down menu
- Select Search to open Organization Search window
- Enter the search criteria and select Search
- Select a result or perform the search again to locate
- If required, select Add Cong Dist: to generate a field for the congressional district. If the data is in the Organization Table, it will automatically populate. (Repeat Add if needed for multiple fields)
- Enter the congressional district in the 2 character State, hyphen, 3-character District format. (AA-000)
- Select Save to keep the Other Organization

Once Other Organization type is selected the Location and Find/Remove address fields will be replaced with a Search function.

Use the Search function to locate the Organization.

Search for Organization. Selection from Results will populate here.
Adding a Performance Site (Location Address)

- Select **Add Organization/Location**
- Select **Type: Performance Site** from drop-down menu
- Enter a contact name in the **Location** field.
- Select **Find Address** to open the Rolodex Search window
- Enter the criteria and select **Search**
- Select a result or perform the search again to locate
- Select **Add Cong Dist:** to generate a field for the congressional district. (Repeat if needed for multiple fields)
- Enter the congressional district in the 2 character State, hyphen, 3 character District format. (AA-000)
- Select **Save** to keep the Performance Site

Deleting Other Organizations or Performance Sites:
Select **Remove (Type)** to delete the entry.

Deleting Congressional Districts:
Select **Remove (Cong. Dist)** to remove the entry.

If all districts in a state are affected, enter “all” for the district number (ex. MA-all)
If nationwide (all districts in all states), enter US-all
If the program/project is outside the U.S., enter 00-000
3. Investigators & Key Personnel

A. Search for and add the Principal Investigator on the Investigators/Key Persons screen.
   - **Employee Search** Employee Search will locate persons from the Northeastern HR system.
   - **Non Employee Search** DO NOT USE THIS SEARCH FOR PRINCIPAL (AND Co-) INVESTIGATORS. Non Employee Search will locate persons maintained in the Rolodex.

B. Edit the PI’s maintained data:
   1. **Modify** or revise contact information
   2. **Enter** Commons User Name (For any Grants.gov submission using the R&R Senior/Key Person Profile form, this field will populate the "Credential" field, e.g. agency login
   3. **Enter** estimated percent of effort over the proposed project period
   4. **Enter** estimated Academic/Summer/Calendar year effort
   5. **Select** Multi PI, if relevant to your submission (see key box below).
   6. **Select Save** By default, the first individual entered is designated with Role: Principal Investigator. Use the Multi PI checkbox to designate Investigators as Multiple PI (including the Principal Investigator). The Principal Investigator role will be recognized as the Contact PI by NIH. At this time, NIH is the only sponsor that utilizes Multi PI; please review your NIH opportunity for more eligibility and submission requirements.

By default, the first individual entered is designated with Role: Principal Investigator. Use the Multi PI checkbox to designate Investigators as Multiple PI (including the Principal Investigator). The Principal Investigator role will be recognized as the Contact PI by NIH. At this time, NIH is the only sponsor that utilizes Multi PI; please review your NIH opportunity for more eligibility and submission requirements.

Result: Saved person is added to lower pane List of Investigators/Key Study Personnel
C. Adding Co-Investigators and Key Study Persons.

Enter Co-Investigator: Proposal Role

1. **Search** Employee or Non-Employee
2. **Modify** or enter contact or information
3. **Enter** Commons User Name (for NIH, this is required for Investigators designated as Multi-PI)
4. **Enter** estimated percent of effort of proposed project period
5. **Select** Multi PI, if relevant.
6. **Select** Co-Investigator from Proposal Role drop-down list.
7. **Select Save**

---

Enter Key Study Person(s): Key Person Role field presented.

1. **Search** Employee or Non-Employee
2. **Modify** or enter contact and unit information
3. **Enter** Commons User Name, if relevant
4. **Enter** estimated percent of effort of proposed project period
5. **Note:** intentionally disabled (grayed out) for Key Study Person - Academic/Summer/Calendar year effort
6. **Select** Proposal Role Key Study Person from the drop-down list
7. **Enter** or modify Key Person Role in presented field – defines this persons specific activity on this project.
8. **Select Save**

---

When Key Study Person is the selected Proposal Role; Key Person Role field is presented. Entering this project role is mandatory.
D. Review Proposal Personnel

1. **Name**: list of Investigators and Key Persons in order of entry.

2. **Department** is the primary unit for the listed person.

3. **LU** is the Lead Unit for this proposal.

4. **MPI** check mark will populate to designate Multi PI.

5. **Role** is the Proposal Role applied or entered for the listed person.

6. **% Effort**
   a. **T** is Total effort
   b. **A** is Academic effort
   c. **S** is Summer effort
   d. **C** is Calendar effort

7. **Remove**: use to delete the named person entry.

8. **Certify**: open the Certify Investigator window and answer, review or print the answered questions.

9. **X**: Signifies certification is not completed.

   ✔: Signifies certification is complete.

10. **Details**: select to open the Person Detail window to review, add, or modify contact and degree information.
E. Customize Proposal Person Details

Select **Details** (click on the word “Details”) to open the Person Details screen.

1. **Add Unit**, if needed, to support approval routing and credit split.
   a. Select **Add Unit**

   **Do not delete the PI Lead Unit entered by Coeus.** The Lead Unit for the PI must match the Lead Unit for the proposal. If this is the wrong Lead Unit for this investigator or proposal, you must copy or create a new proposal in the correct unit. Otherwise, use **Add Unit** to amend the list of units required to support routing and credit split.

   ![Add Unit Screen]

   ![Person Details Screen]

   rhanlon@neu.edu
b. Select **Search** of centrally maintained Units.

![Unit Details table]

c. Enter search criteria to locate Unit number,

![Search form]

d. Select a Unit, search again, or close the window.

![Unit Search Result]

e. Confirm selection: Unit applied to Proposal Person Details:

![Person Details for Hanlon, Rosemary]

f. Select **Save** at the bottom on the screen.
2. Person Details: edit any white-background field entries as required for this proposal.

Changes made to Person Details on this screen will only be applied, and retained in, this proposal record. Changes will not update Coeus person data.

A. Modify entries as needed. White-background fields are editable.
B. Insert eRA Commons User ID if proposal is being submitted to NIH.
C. Provide Full Address, Phone and E-mail for Grants.gov submissions.

3. Degree Details:
Open Degree Detail window by Selecting “Add Degree”.

Result: Fields generated to enter degree.
Select Degree Type from list, type in other field data; Save.
4. Certify Investigators

Open the Certify window from either the Person Details:

Or open Certify from the List of Investigator/Key Personnel panel:

a. Select Certify for the investigator you want certify to open the Certification window

b. Review the questions and select the appropriate answer in the electronic certificate.

c. Select Save to save your responses

d. Select Print Certification to generate a print-ready PDF file for the investigators signature.

e. Select Return to Investigator to close the Certify window.

TIP: You must SAVE the answered Certification questions before you can print. Click Save first and then Print Certification.

Result: The green check indicates that the Certification is complete for this investigator.
4. Credit Split

<table>
<thead>
<tr>
<th>Investigator:</th>
<th>Barnett, Lawrence W</th>
<th>Proposal #:</th>
<th>00000020 (In Progress)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title:</td>
<td>Test Proposal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Credit Split:</th>
<th>Recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barnett, Lawrence W</td>
<td>50.00</td>
</tr>
<tr>
<td>000001 - Northeastern University</td>
<td>100.00</td>
</tr>
<tr>
<td>Unit Total</td>
<td>100.00</td>
</tr>
<tr>
<td>Henry, Robert</td>
<td>50.00</td>
</tr>
<tr>
<td>000001 - Northeastern University</td>
<td>100.00</td>
</tr>
<tr>
<td>Unit Total</td>
<td>100.00</td>
</tr>
<tr>
<td>Investigator Total</td>
<td>100.00</td>
</tr>
</tbody>
</table>

Recognition for each investigator must collectively total 100.
Recognition for each unit must total 100. This information is used to calculate overhead return.
5. Special Reviews

The SPECIAL REVIEW screen is used to identify research that requires special review or approval, such as work with human subjects, animals, recombinant DNA, foundation proposals, etc.

1. Click the drop-down box in the field labeled Special Review
2. Select the type of Review that applies to the proposed project
3. Click the drop-down box in the field labeled Approval
4. Select a status appropriate to the review.
   - If:
     - The status is Pending, then all required information has been entered.
     - The status is Submitted, and then the Application Date of the Regulatory Review must be entered.
     - The status is Approved, then a protocol number must be entered in the Protocol Number field and an approval date entered into the Approval Date field
     - The status is Exempt, then the exempt code (letter and number, i.e. E4) must be entered in the Comments field. Multiple exempt codes should be separated by a comma (i.e. E1,E4).
5. Save the entry.

Select Special Review from drop-down list; select Approval Status from drop-down list; select Save.

Results:

- Select View to see the Comments entered for that Special Review.
- Select Remove to delete the review.
6. Abstracts

Not used at Northeastern University.

Abstracts are text boxes for specific subjects. The entries are used to populate certain sponsor forms. See the sponsor instructions, and the Coeus s2s Form Guides™, to determine if an Abstract should be used (as a requirement or option) in your proposal.

1. Select abstract type to navigate to that abstract text entry panel
2. Enter or paste in text.
3. Save

Results:

Abstract selections – click to navigate to this entry panel.

Blinking cursor: type or paste in text. See sponsor instructions for content requirements.

Check denotes Abstract text entered. Color text identifies text

Identity of User who entered data and the timestamp of this action.

---

See the Consortium Document: S2S Form Guides: User Guides for Proposal Development system-to-system forms
7. Others

Enter your NSPIRES user name (NASA proposals only)

![Others form]

8. YNQ: Yes No Questions

![YNQ form]

Answers to these compliance questions are required by the Institute, the sponsor, or both.

1. Answer all questions on the YNQ screen by clicking on each radial button.
2. Use More to read additional information about this question, if available.
3. Save the answers.
9. Assign Proposal Roles

Check the roles that have been assigned for your proposal on the Proposal Roles screen, and make changes as necessary. Any roles you assign to a user apply only to the current proposal. If you copy a proposal, access rights do not carry over.

1. **Click Add User** at Role category line
2. **Search** (users must have Coeus ID)
3. **Select** the user: they will be added to the role category

### Role Definitions

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aggregator</td>
<td>Make changes to any part of the proposal, answer yes/no questions, certify investigators, submit for approval</td>
</tr>
<tr>
<td>Approver</td>
<td>Approve the proposal. You cannot add or delete users from this role, but you can see which users have been designated as approvers after the proposal is routed for approval. The list of approvers is maintained by Coeus administrators.</td>
</tr>
<tr>
<td>Budget creator</td>
<td>Create and edit the budget.</td>
</tr>
<tr>
<td>Narrative writer</td>
<td>Create and edit the narratives.</td>
</tr>
<tr>
<td>Viewer</td>
<td>View any part of the proposal. Cannot edit.</td>
</tr>
</tbody>
</table>
10. Questionnaire

Questionnaires that have been designated as mandatory or optional for this particular proposal record will appear in the navigation panel. If the questionnaire is mandatory, you will be alerted when the Coeus proposal validations are performed, or when attempting to validate or print/preview certain Grants.gov forms.

Open the Questionnaire by clicking the questionnaire name.

Questions may need to be answered by:
- clicking a radial button to respond to Yes/No, or Yes/No/NA,
- Selecting a Date from the calendar tool
- Entering text
- Selecting from a defined list

Answer each question in the panel, and then click Save & Proceed to present the next question(s).

The "More" button may contain additional information to help you understand and answer the question.

Previous allows a user to scroll back to the last question answered.
Start Over to return to the beginning of the Questionnaire and begin again. All prior answers will be deleted
Modify to open a previously completed Questionnaire.
Print will open a new browser window with a PDF report of the questions and any answers entered if the questionnaire has not been completed.
11. Budget

Once you have saved a proposal, you can click the Budget link on the Proposal Navigation Menu and the Budget Navigation Menu appears. To return to the other proposal screens from the Budget, select the Return to Proposal link at the top of the Budget navigation panel.

<table>
<thead>
<tr>
<th>Proposal Navigation Menu</th>
<th>Budget Navigation Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>✓ General Info</strong></td>
<td><strong>Return To Proposal</strong></td>
</tr>
<tr>
<td><strong>✓ Organization</strong></td>
<td></td>
</tr>
<tr>
<td>Investigators/Key Persons</td>
<td><strong>✓ Budget Versions</strong></td>
</tr>
<tr>
<td>Credit Split</td>
<td><strong>✓ Budget Summary</strong></td>
</tr>
<tr>
<td>Special Review</td>
<td><strong>Print</strong></td>
</tr>
<tr>
<td>Abstract</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td><strong>✓ Personnel</strong></td>
</tr>
<tr>
<td>YNQ</td>
<td><strong>Adjust Periods</strong></td>
</tr>
<tr>
<td><strong>✓ Proposal Roles</strong></td>
<td><strong>✓ Proposal Rates</strong></td>
</tr>
<tr>
<td><strong>Questionnaire</strong></td>
<td><strong>Validate</strong></td>
</tr>
<tr>
<td>PHS Fellowship required form data</td>
<td></td>
</tr>
<tr>
<td><strong>Grants.Gov</strong></td>
<td><strong>Budget Set Up</strong></td>
</tr>
<tr>
<td><strong>Budget</strong></td>
<td></td>
</tr>
<tr>
<td>Upload Attachments</td>
<td><strong>Budget Periods</strong></td>
</tr>
<tr>
<td>Validate</td>
<td>Personnel Budget</td>
</tr>
<tr>
<td>Submit for Approval</td>
<td>Equipment</td>
</tr>
<tr>
<td></td>
<td>Travel</td>
</tr>
<tr>
<td></td>
<td>Participant/Trainee</td>
</tr>
<tr>
<td></td>
<td>Other Direct Costs</td>
</tr>
<tr>
<td></td>
<td><strong>Modular Budget</strong></td>
</tr>
<tr>
<td></td>
<td>Cost Sharing Distribution</td>
</tr>
<tr>
<td></td>
<td>Under Recovery Distribution</td>
</tr>
<tr>
<td></td>
<td>Project Income</td>
</tr>
<tr>
<td></td>
<td><strong>Generate All Periods</strong></td>
</tr>
</tbody>
</table>

**Viewing the Budget using the Print Feature**

The Print feature will generate a PDF report of the budget that allows you to view all budgeted expenses. The Budget Summary by Period report is particularly useful; this is the budget format displayed during the Coeus Web Proposal Approval process. Most internal approvers evaluate this comprehensive view of the budget during their review process.
### CoeusLite Budget Screens

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return To Proposal</td>
<td>Returns the user to the general proposal navigation panel.</td>
</tr>
<tr>
<td>Budget Versions</td>
<td>Displays a summary line for all budget versions created.</td>
</tr>
<tr>
<td>Budget Summary</td>
<td>Displays summary budget information; i.e. budget totals, direct and indirect costs, underrecovery, cost sharing, period budget totals, etc.</td>
</tr>
<tr>
<td>Print</td>
<td>Navigates to the Budget print options screen</td>
</tr>
<tr>
<td>Validate</td>
<td>Use the Validate tool to process any maintained Budget Business Rule Validations.</td>
</tr>
<tr>
<td>Personnel</td>
<td>Add personnel for budgeting; enter salary details required for expense calculations.</td>
</tr>
<tr>
<td>Adjust Periods</td>
<td>Allows users to modify budget start and end dates, or to add or modify budget periods, or period lengths.</td>
</tr>
<tr>
<td>Proposal Rates</td>
<td>Displays institute overhead rates; allows for insertion of applicable rates.</td>
</tr>
<tr>
<td>Validate</td>
<td>Use the Validate tool to process any maintained Budget Business Rule Validations.</td>
</tr>
<tr>
<td>Personnel Budget</td>
<td>Add or remove personnel expense, customize their effort and time spent on this project.</td>
</tr>
<tr>
<td>Equipment</td>
<td>Add or remove equipment expenses</td>
</tr>
<tr>
<td>Travel</td>
<td>Add or remove travel expenses</td>
</tr>
<tr>
<td>Participant/Trainee</td>
<td>Add or remove participant/trainee expenses</td>
</tr>
<tr>
<td>Other Direct Costs</td>
<td>Add or remove all other expenses</td>
</tr>
<tr>
<td>Modular Budget</td>
<td>Navigate to Modular Budget entry screen</td>
</tr>
<tr>
<td>Cost Sharing Distribution</td>
<td>Navigate to Cost Sharing Distribution entry screen</td>
</tr>
<tr>
<td>Under Recovery Distribution</td>
<td>Navigate to Under Recovery Distribution entry screen</td>
</tr>
<tr>
<td>Project Income</td>
<td>Navigate to Project Income entry screen</td>
</tr>
<tr>
<td>Generate All Periods</td>
<td>Calculate budget periods based on period 1 entries and create required additional budget period screens.</td>
</tr>
</tbody>
</table>
Before you start your budget…

A note about Coeus Budget Calculations

If you have been using other programs or using spreadsheets to calculate your budget, you may notice that those calculations and Coeus calculations are slightly different.

Coeus calculates budget amounts based with a complex equation that uses a number of different variables such as, number of days of effort, percentage of inflation, overhead and fringe benefits, as well as the data you have entered on the Budget Set Up > Personnel screen regarding appointment types, base salaries, and effective dates.

Coeus does not average, and rounds from a much greater number of significant figures than a spreadsheet.

All of these factors result in a budget with a high degree of precision.

---

Turn Off Pop-up Blocker! Check the pop-up blocker settings for your web browser so you can be sure to Always Allow Pop-Ups from CoeusLite.

The browser Pop-up Blocker will block display of the Line Item Edit or Detail screens in the Budget Category>Periods window (Personnel, Equipment, Travel, Participant/Trainee, or Other Direct Costs).

---

Initial Budget screen Access – Budget Set up requirements.

The first time you navigate to the Budget, you will be presented with Budget Set Up> Personnel screen. If you previously entered a Non Employee Search, Rolodex, person, in the Investigators/Key Persons screen then at this point in the budget process you will be prompted to Sync Budget Persons. You should select the correct Appointment Type and save the entry.

---

Prompt for Rolodex persons or personnel with incomplete data in Coeus.

The personnel already added on the Investigators/Key Persons screen (PI, Co-I(s), and Key Study Persons) will automatically populate some of the data fields required on this screen from Person Data information fed to Coeus.

---

Coeus-recommends an Appointment Type and Job Code; either Save or select and enter alternate data.

The personnel already added on the Investigators/Key Persons screen (PI, Co-I(s), and Key Study Persons) will automatically populate some of the data fields required on this screen from Person Data information fed to Coeus.

---

Personnel listed on this Budget Set Up Personnel screen will be available to add to the Personnel Budget. You must add your personnel to the set up screen in order to create the “pick-list” of all personnel to be added to your budgeted costs, though not all the persons on the table need be in any of the budget periods.

Once the Set Up is complete, enter Period 1 expenses, and then generate all periods. Once all the proposal periods have been generated, individual tabs will appear for each proposal period. You can then click on each tab and then navigate through the budget category screens to make adjustments relevant to that period.
12. Budget Setup

A. Add and complete Budget Personnel entries

1. **Navigate** to Personnel entry screen

2. **Search** for and **Add** the proposal personnel needed for your project budget. (Research staff, Support staff, Postdoctoral Associates, Graduate Students, or To-Be Announced staff, etc.):

   - **Add Employee** Employee Search will locate persons maintained in Coeus from your HR system.
   - **Add Non Employee** Non Employee Search will locate persons maintained in the Coeus Rolodex.
   - **Add TBA** Add TBA Search will locate a predefined list of to-be-announced persons by job title. (i.e. Project Manager, Graduate Student, etc.)

Only the names of the PI, Co-I and Key Persons will be printed on the Grants.gov RR Budget (detail) forms. Refer to your sponsor guidelines for specific definitions of Key Personnel.

Budget Persons populated from Investigator/Key Persons:

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Code</th>
<th>Appointment Type</th>
<th>Eff Date</th>
<th>Base Salary</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Henry, Robert</td>
<td>000000</td>
<td>REG EMPLOYEE</td>
<td>02/01/2012</td>
<td>$0.00</td>
<td>Remove</td>
</tr>
<tr>
<td>Barnett, Lawrence W</td>
<td>000000</td>
<td>8M DURATION</td>
<td>02/01/2012</td>
<td>$0.00</td>
<td>Remove</td>
</tr>
</tbody>
</table>

- **Select Add Employee** to search the HR database or select **Add Non Employee** to search the Rolodex.
- **Please enter search criteria of the form ‘value’ or ‘value or value’ in any of search fields.**

  - **Last Name:**
  - **Full Name:**
  - **Email:**
  - **Unit Name:**
  - **Directory Title:**
  - **Office Phone:**
  - **First Name:**
  - **User Name:**
  - **Department Number:**
  - **School:**
  - **Office Location:**

- **Search** for the employee by entering data into the fields on the search screen.
  - Entering **Last Name** and **First Name** is usually sufficient, use other fields to help narrow down searches.
  - Use the asterisk (*) before and after data in fields to widen searches and minimize typed entries.

- **Select** search to display the search results.
• **Select** the appropriate person displayed in the **Person Search Results** screen. Take time to scroll across the entire window to be sure you’ve selected the correct person – some individuals may appear more than once.

**Add TBA:**

• To add unnamed personnel (personnel that will be staffed but for whom you have not yet hired or assigned):
  
  o **Select** **Add TBA**
  
  o **Select** on the appropriate category displayed in the **TBA Persons** window.
  
  o **Save**

---

**TBA Persons**

<table>
<thead>
<tr>
<th>TBA Id</th>
<th>Name</th>
<th>Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Undergraduate Students</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Post Doctoral Associates</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Technical Staff</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Graduate Student</td>
<td>00001</td>
</tr>
<tr>
<td>5</td>
<td>Professional Project Staff</td>
<td></td>
</tr>
</tbody>
</table>

**Result of Add TBA selection:**

**Budget Personnel**

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Code</th>
<th>Appointment Type</th>
<th>Eff Date</th>
<th>Base Salary</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Henry, Robert</td>
<td>000000</td>
<td>REG EMPLOYEE</td>
<td>02/01/2012</td>
<td>$100,000.00</td>
<td>Remove</td>
</tr>
<tr>
<td>Barnett, Lawrence JV</td>
<td>000000</td>
<td>8M DURATION</td>
<td>02/01/2012</td>
<td>$100,000.00</td>
<td>Remove</td>
</tr>
<tr>
<td>Graduate Student</td>
<td>00001</td>
<td>12M DURATION</td>
<td>02/01/2012</td>
<td>$30,000.00</td>
<td>Remove</td>
</tr>
</tbody>
</table>
3. **Enter Eff Date** The Effective Date displayed automatically defaults to the start date of the proposal; however, if planned salary increases are expected, more precise amounts are obtained when you enter the effective date of the new salary.

4. **Enter Base Salary**: Enter the person’s full annual salary – as it relates to the length of appointment entered – as of the Effective Date. Use care when entering the amount. Do not use commas.

5. **Job Code**: This field is not used at Northeastern University and will be pre-populated as Job Code: 000000.

6. **Appointment Type**: Review that this information is correct; it is part of the calculation that charges salary to the budget. Select the appropriate appointment type from the dropdown list:
   - The “M” refers to months of appointment; i.e. a professor with a 8-month appointment will display as 8M DURATION.
   - REG EMPLOYEE refers to a Regular Employee with a 12-month salary base.
   - SUM EMPLOYEE refers to a Summer Appointments (not faculty summer salary).
   - TMP EMPLOYEE refers to a Temporary Appointment, use with a Monthly base salary level.

   Coeus calculates Faculty salaries (including summer months) based on their 8-month academic appointment. Changing the Appointment type can impact your budget if you mismatch Appointment Type and Base Salary. Also, the Effective Date of the salary directly impacts when Coeus will inflate that salary in your budget.

7. **Save** the proposal personnel once you have entered all personnel who will be part of your budget.

**Not all personnel listed in the Set Up Personnel panel need to be applied as an expense line in your budget.** PI’s Co-I’s, and Key Personnel will automatically be maintained to the Budget Person table, but you can leave any salary detail line blank if you will not use the individual in the budget.
B. Adjust Periods (boundaries)

Coeus will create default budget periods based on 12-month budget periods using the Start and End dates you entered on the General Info screen of the proposal. If the sponsor’s funding opportunity announcement indicates other boundaries, you must change the default budget periods in the manner described here.

To change the periods, enter the revised dates or select dates using the calendar tool.

To add another period, click Add Period (located below the period line items), and enter the start and end dates.

To remove a period, click Remove (to the right of each period line item displayed).

Once you have made the necessary changes, select Save.

When copying a proposal with Start and End dates that do not match your new submission, be sure to adjust the Start and End dates on the General Info screen first. Then make the necessary changes for your new proposal on the Adjust Periods screen.

Do not forget:
- Proposal Rates screen: Sync – and Save – Proposal Rates;
- Budget Personnel screen: Update the “Eff Dates” for the “Base Salary” amounts!
No. of Months contained in each budget period in Adjust Periods is now displayed on two CoeusLite screens: Budget Summary and Budget Periods > Personnel Budget.

For budget periods that are greater or less than 12 months it is advised to generate these unusual budget periods before applying certain budget expense details. While this means additional steps to manually populate the expenses in each budget period, it is necessary for accurate personnel effort and other budgeting decisions that should be made by the user. If you choose to add personnel detail prior to generating budget periods, you must still review each Personnel Budget Detail window for each budget person to verify and/or modify.

For Personnel expenses:
- Use the standard instructions to select cost elements and maintain the budget person details as detailed in this guide.
- Be especially mindful to define the Start Date and End Date for each person as it relates to this budget period.
- You may need to use the Add Person option several times for each person to expense them to Academic or Summer periods if the budget period is especially long. The figure below describes an 18 month budget period: two (2) lines were needed to capture the Academic months.

Note the default Start Date & End Date span the full 18 months of this project period.
For Non-Personnel Expenses:

You can enter non-personnel line item expenses prior to generating budget periods. Costs will be inflated once per generated budget period (if the “apply inflation” box is checked).

<table>
<thead>
<tr>
<th>Description</th>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>01/01/2011</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>06/30/2011</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td>$50,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost Sharing</td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Underrecovery</td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>On Campus</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Rates Applicable to the Line Item

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td></td>
<td>$34,000.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
C. Proposal Rates

The **Proposal Rates** screen lists the F&A, Fringe Benefit, and Inflation rates that will be applied to your budgeted costs.

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Organized Research</th>
<th>F and A</th>
<th>Fringe Benefits</th>
<th>Inflation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate Type</td>
<td>On Off Campus</td>
<td>Fiscal Year</td>
<td>Start Date</td>
<td>Institute Rate</td>
</tr>
<tr>
<td>MTDC</td>
<td>Off</td>
<td>2009</td>
<td>07/01/2008</td>
<td>7.5</td>
</tr>
<tr>
<td>MTDC</td>
<td>On</td>
<td>2009</td>
<td>07/01/2008</td>
<td>58.0</td>
</tr>
<tr>
<td>Research Rate</td>
<td>Off</td>
<td>2006</td>
<td>07/01/2007</td>
<td>21.0</td>
</tr>
<tr>
<td>Research Rate</td>
<td>On</td>
<td>2006</td>
<td>07/01/2007</td>
<td>24.0</td>
</tr>
<tr>
<td>FAC (VI)</td>
<td>Off</td>
<td>2003</td>
<td>06/01/2008</td>
<td>3.0</td>
</tr>
<tr>
<td>FAC (VI)</td>
<td>On</td>
<td>2003</td>
<td>06/01/2008</td>
<td>3.0</td>
</tr>
<tr>
<td>FAC (VI)</td>
<td>Off</td>
<td>2009</td>
<td>06/01/2009</td>
<td>3.0</td>
</tr>
<tr>
<td>FAC (VI)</td>
<td>On</td>
<td>2009</td>
<td>06/01/2009</td>
<td>3.0</td>
</tr>
<tr>
<td>FAC (VI)</td>
<td>Off</td>
<td>2010</td>
<td>06/01/2010</td>
<td>3.0</td>
</tr>
<tr>
<td>FAC (VI)</td>
<td>On</td>
<td>2010</td>
<td>06/01/2010</td>
<td>3.0</td>
</tr>
<tr>
<td>FAC (VI)</td>
<td>Off</td>
<td>2011</td>
<td>06/01/2011</td>
<td>3.0</td>
</tr>
<tr>
<td>Tuition</td>
<td>On</td>
<td>2012</td>
<td>07/01/2011</td>
<td>3.0</td>
</tr>
<tr>
<td>Vacation</td>
<td>Off</td>
<td>2008</td>
<td>07/01/2007</td>
<td>11.0</td>
</tr>
<tr>
<td>Vacation</td>
<td>On</td>
<td>2008</td>
<td>07/01/2007</td>
<td>9.5</td>
</tr>
<tr>
<td>Vacation on LA</td>
<td>Off</td>
<td>2008</td>
<td>07/01/2007</td>
<td>11.0</td>
</tr>
<tr>
<td>Vacation on LA</td>
<td>On</td>
<td>2008</td>
<td>07/01/2007</td>
<td>9.5</td>
</tr>
<tr>
<td>Other</td>
<td>Off</td>
<td>1980</td>
<td>07/01/1980</td>
<td>0.0</td>
</tr>
<tr>
<td>Other</td>
<td>On</td>
<td>1980</td>
<td>07/01/1980</td>
<td>0.0</td>
</tr>
</tbody>
</table>

Rates are maintained centrally by your Coeus Application Administrator, but rates to be applied to this proposal can be entered on this rates screen.

If you have opened or copied an older proposal or revised the start and end date of the proposal, select **Sync** at the bottom of the screen to update your proposal with the appropriate Institute rates effective for your budget periods, and then **Save**.

If you make a mistake or change your mind, you can click **Reset** at the bottom of the screen to revert back to the Institute rates, and then **Save**.
To modify the applicable rates for this proposal:

1. Open the **Proposal Rates** screen.

2. Scroll down to the appropriate category of the screen and enter the percent rate to be used for this proposal in the **Applicable Rate** fields to the right of the **Rate Type** listed. Enter the rate in each **Fiscal Year** and for both **On and Off Campus** line item of this category, as needed.

3. When you have adjusted the necessary rates, scroll down to the bottom of the screen and select **Save**.

**Example:** Review/Modify Faculty Inflation

<table>
<thead>
<tr>
<th>Inflation</th>
<th>Rate Type</th>
<th>On Off Campus</th>
<th>Fiscal Year</th>
<th>Start Date</th>
<th>Institute Rate</th>
<th>Applicable Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Salaries (3/1)</td>
<td>Off</td>
<td>2003</td>
<td>06/01/2003</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (3/1)</td>
<td>On</td>
<td>2003</td>
<td>06/01/2003</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (3/1)</td>
<td>Off</td>
<td>2003</td>
<td>06/01/2003</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (3/1)</td>
<td>On</td>
<td>2003</td>
<td>06/01/2003</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (3/1)</td>
<td>Off</td>
<td>2010</td>
<td>06/01/2010</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (3/1)</td>
<td>On</td>
<td>2010</td>
<td>06/01/2010</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (3/1)</td>
<td>Off</td>
<td>2011</td>
<td>06/01/2011</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Faculty Salaries (3/1)</td>
<td>On</td>
<td>2011</td>
<td>06/01/2011</td>
<td>3.0</td>
<td></td>
<td>3.0</td>
</tr>
</tbody>
</table>

**Inflation rates** may be applied by Rate Type (cost element), separately for each Budget Period and for On and/or Off Campus.

**Most Rate Types** (shown above) represent personnel budget line item descriptions contained in **Budget Periods > Personnel Budget > Salary Types**, depicted as:

<table>
<thead>
<tr>
<th>Salary Type</th>
<th>Salary Faculty</th>
</tr>
</thead>
</table>

**Rate Types for Materials and Services** (also shown above) represent all non-personnel budget line items listed under **Budget Periods: Equipment, Travel, Participant/Trainee, and Other Direct Cost**, depicted as:

<table>
<thead>
<tr>
<th>Type</th>
</tr>
</thead>
</table>
D. Personnel Budget

When first opened, the Personnel Budget screen displays a tab for Period 1.

1. Select Add Person to add the personnel to be included in the budget from the pick-list of personnel previously added in the Budget Set Up > Personnel screen.
   - Select the checkboxes to the left of the names of all the personnel required for the Period 1 budget. You can also select the single checkbox at the top of the list to Select All.

   - Select Save.
Result: all the personnel selected will now be displayed on the Personnel Budget screen.

Period 1 displays at initial budget entry. Other periods will be generated later.

Start date defaults to Project Start date. End date defaults to Project End date. Revise these dates as appropriate to impact the calculated effort and requested funds.

Select Add Person to insert more Persons.
Select Calculate to see how entries impact budget.
Select Save to calculate and save customized entries.

Subtotal of all personnel expenses.

Direct Cost: $0.00, Indirect Cost: $0.00, Total Cost: $0.00
Under Recovery: $0.00, Cost Share: $0.00, Period: 01/01/2009 - 12/31/2009

Period 1

<table>
<thead>
<tr>
<th>Name</th>
<th>Salary Type</th>
<th>%Charged</th>
<th>%Effort</th>
<th>Months</th>
<th>Fringe Benefit($)</th>
<th>Funds Requested($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seuss, Doctor</td>
<td>Academic</td>
<td>0.00</td>
<td>0.00</td>
<td>0.0</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Period</td>
<td>01/01/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requested Salary($)</td>
<td>$0.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Period 2

<table>
<thead>
<tr>
<th>Name</th>
<th>Salary Type</th>
<th>%Charged</th>
<th>%Effort</th>
<th>Months</th>
<th>Fringe Benefit($)</th>
<th>Funds Requested($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harlan, Rosemary</td>
<td>Academic</td>
<td>0.00</td>
<td>0.00</td>
<td>0.0</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Period</td>
<td>01/01/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requested Salary($)</td>
<td>$0.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Period 3

<table>
<thead>
<tr>
<th>Name</th>
<th>Salary Type</th>
<th>%Charged</th>
<th>%Effort</th>
<th>Months</th>
<th>Fringe Benefit($)</th>
<th>Funds Requested($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBA - Project Coordinator</td>
<td>Academic</td>
<td>0.00</td>
<td>0.00</td>
<td>0.0</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Period</td>
<td>01/01/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requested Salary($)</td>
<td>$0.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Period 4

<table>
<thead>
<tr>
<th>Name</th>
<th>Salary Type</th>
<th>%Charged</th>
<th>%Effort</th>
<th>Months</th>
<th>Fringe Benefit($)</th>
<th>Funds Requested($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer Programmer</td>
<td>Academic</td>
<td>0.00</td>
<td>0.00</td>
<td>0.0</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Period</td>
<td>01/01/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2009</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requested Salary($)</td>
<td>$0.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Personnel Costs - Line Items entered in Coeus Premium (View-only)

<table>
<thead>
<tr>
<th>Salary Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Fringe Benefit($)</th>
<th>Funds Requested($)</th>
</tr>
</thead>
</table>

Total Funds Requested($) $0.00
2. Customize each Personnel Line Item:

- Select the appropriate **Salary Type** from the drop-down menu.

- Select the appropriate **Period** from the drop-down menu:
  - **Academic**: The 8-month academic year: September 1 through April 30.
  - **Calendar**: The 12-month calendar year.
  - **Cycle**: 12 month project period.
  - **Summer**: The 4 months not covered by the Academic period: May 1 through August 31.

- Enter **% Charged** and **% Effort**.
  - Equal amounts mean the entire expense will be paid by the sponsor.
  - **% Charged** less than **% Effort** will generate cost sharing.

- Edit the **Start Date** and/or **End Date** to either correctly reflect Faculty Summer Month effort, or remove eligible vacation time, or accurately reflect time spent on the project, as needed.

- Select **Save** to recalculate and save customized.

- Select **Calculate** (located below all of the personnel entries) if you want to see how a changed entry impacts the budget.

- Select **Remove** to delete the person entered.

- Select **Edit** to open the Line Item Details window for that personnel entry.
3. Entering Personnel Line Item Details

- Select **Edit** to the right of each line item to display the **Line Item Details** window.
  (This link is labeled **Details** if the budget is marked **complete** or if you are authorized to **view only**.)

**Line Item Details window:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Seuss, Doctor,</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Role</td>
<td>Undefined</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/15/2009</td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2009</td>
</tr>
<tr>
<td>Cost</td>
<td>$22,302.82</td>
</tr>
<tr>
<td>Cost Sharing</td>
<td>$0.00</td>
</tr>
<tr>
<td>Underrecovery</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Rates Applicable to the Line Item**

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td></td>
<td>$20,246.50</td>
<td>$0.00</td>
</tr>
<tr>
<td>Research Rate</td>
<td></td>
<td>$5,352.08</td>
<td>$0.00</td>
</tr>
<tr>
<td>Vacation</td>
<td></td>
<td>$2,118.77</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Reminder!** Your browser software must be set to **Allow Pop-ups** to view this window.

The following field can be modified on the **Line Item Details** window:

- **Description**: Add or change the description as needed.
- Grayed out fields are edited in two other windows:
  - **Description** and **Start** and **End** Dates: edit on **Budget Periods > Personnel Budget**.
  - **Rate Types / Apply**: edit on the **Budget Set Up > Proposal Rates Table**.

The following salary calculated costs can be viewed on the **Line Item Details** window:

- **Cost**
- **Cost Sharing**
- **Underrecovery**
- **Rates applicable to the Line item**: Cost and Cost Sharing amounts.

If you've made any edits select:

- **Save and Apply to Current Period** or
- **Save and Apply to Current and Later Periods**, as relevant to your proposal

If there are no edits select:

- **Close**
E. Equipment Screen

Please refer to your sponsor guidelines, specific opportunity instructions, and Institutional Policy and Procedures for budgeting equipment items.

1. Select **Add Equipment** to add individual items of equipment to the budget.
   - Select a **Type** from the drop-down menu.
   - Enter a **Description**. Descriptions entered in the budget line items WILL print on Grants.gov Detailed budget forms. Current Grants.gov equipment budgeting requires a single line item for each equipment item and a description for each Equipment item.
   - Enter a cost in the **Funds Requested ($)** field – do not use commas.
   - Select **Calculate** to see how this item impacts budget totals.
   - Select **Remove** to delete the entry.
   If there are no edits select: **Close**
   - Select **Save** to save your entered budget item.
2. Enter Equipment Line Item Details

- **Select Edit** to the right of each line item to display the Line Item Details window; there you may enter more detailed information about each line item.

<table>
<thead>
<tr>
<th>Line Item Details</th>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td>$7,500.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Apply Inflation</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>On Campus</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following fields can be modified on the Line Item Details window:

- **Description**: Change the line item description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.
- **Quantity**: Enter if relevant or required based on the sponsor instructions.
- **Cost**: Change as needed. You will see the updated amount back on the main Equipment screen.
- **Cost Sharing**: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the Proposal Rates screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate. Please consult your OSP Administrator and comply with Institute guidelines for off-campus project eligibility.
- **Rate Types / Apply**: Select and deselect the Apply checkboxes as needed; equipment is exempt from F&A, thus no calculated amounts are available to view.

The following calculated costs can be viewed on the Line Item Details window:

- **Underrecovery**
- **Rates applicable to the Line item**. Note: Equipment is exempt from F&A.

If you've made any edits, select:

- **Save and Apply to Current Period**
- **Save and Apply to Current and Later Periods**, as relevant to your proposal

If there are no edits select: **Close**
F. Travel screen

1. Select **Add Travel** to add all of the travel costs to be included in the budget.
   - Select a **Type** from the drop-down menu.
     - Travel budget options include:
       - Domestic Travel
       - Foreign Travel
   - Enter a **Description**. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.
   - Enter a cost in the **Funds Requested ($)** field – do not use commas.
   - Select **Calculate** to see how this item impacts budget totals.
   - Select **Remove** to delete the entry.
   - Select **Save** to save your entered budget item.

---

**Budget Travel - Domestic Travel Costs (Incl. Canada, Mexico and U.S. Possessions) & Foreign Travel Costs**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic meeting: PI attendance required</td>
<td>$1,850.00</td>
<td></td>
</tr>
<tr>
<td>Foreign conference: UK - 1 week</td>
<td>$8,500.00</td>
<td></td>
</tr>
</tbody>
</table>

**Total Travel Cost**: $10,350.00

---

**Period Totals**

<table>
<thead>
<tr>
<th>Direct Cost</th>
<th>Indirect Cost</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>$303,217.66</td>
<td>$177,068.00</td>
<td>$487,185.66</td>
</tr>
<tr>
<td>Under Recovery</td>
<td>Cost Share</td>
<td>Period</td>
</tr>
<tr>
<td>$0.00</td>
<td>$0.00</td>
<td>01/01/2009 - 12/31/2009</td>
</tr>
</tbody>
</table>

---

**Results after entry:**
2. Enter Travel Line Item Details

- Select Edit to the right of each line item to display the Line Item Details window; there you may enter more detailed information about each line item.

| Description: | Domestic meeting PI attendance required. |
| Start Date: | 01/01/2009 | End Date: | 12/31/2009 | Quantity: | 0 |
| Cost: | $1,850.00 | Cost Sharing: | $0.00 | Underrecovery: | $0.00 |
| Apply Inflation: | ✓ | On Campus: | ✓ |

The following fields can be modified on the Line Item Details window:

- **Description**: Change the line item description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.
- **Quantity**: Enter if relevant or required based on sponsor instructions.
- **Cost**: Change as needed. You will see the updated amount back on the main Travel screen.
- **Cost Sharing**: Enter a value, if appropriate.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the Proposal Rates screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate.
- **Rate Types / Apply**: Select and deselect the Apply checkboxes as needed

The following calculated costs can be viewed on the Line Item Details window:

- **Underrecovery**
- **Rates applicable to the Line item**: Cost and Cost Sharing amounts.

If you've made any edits, select:

- **Save and Apply to Current Period**
- **Save and Apply to Current and Later Periods**, as relevant to your proposal

If there are no edits select: **Close**
G. Participant/Trainee screen

1. Select Add Participant/Trainee to add all of these costs to be included in the budget.
   - Select the Type “Participant Costs” from the drop-down menu.
   - Enter a Description. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.
   - Enter a cost in the Funds Requested ($) field – do not use commas.
   - Select Calculate to see how this item impacts budget totals. Select Remove to delete the entry.
   - Select Save to save your entered budget item.

Results after entry:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Qty</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Costs</td>
<td>10 trainees, 2 months each</td>
<td>10.00</td>
<td>$40,000.00</td>
</tr>
</tbody>
</table>

Total Participant/Trainee Support Costs: $40,000.00
2. Enter Participant/Trainee **Line Item Details**

- **Select Edit** to the right of each line item to display the **Line Item Details** window; there you may enter more detailed information about each line item.

### Line Item Details

<table>
<thead>
<tr>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description: 10 trainees, 2 months each</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date: 01/01/2000 End Date: 12/31/2000</td>
<td>Quantity: 10</td>
<td></td>
</tr>
<tr>
<td>Cost: $40,000.00</td>
<td>Cost Sharing: $0.00</td>
<td>Underrecovery: $0.00</td>
</tr>
<tr>
<td>Apply Inflation: ✓ On Campus: ✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Rates Applicable to the Line Item**

- **Rate Types / Apply**: Select and deselect the **Apply** checkboxes as needed. (Note: Participant/Trainee expenses are exempt from F&A, thus no calculated amounts are available to view.)

The following fields can be modified on the **Line Item Details** window:

- **Description**: Change the line item description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.
- **Quantity**: Enter if relevant or required based on sponsor instructions.
- **Cost**: Change as needed. You will see the changes on the main **Participant/Trainee** screen.
- **Cost Sharing**: Enter a value, if appropriate. Refer to Sponsor Guidelines and Institutional Policy regarding cost sharing requirements.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate.

The following calculated costs can be viewed on the **Line Item Details** window:

- **Underrecovery**
- **Rates applicable to the Line item**: Participant/Trainee expenses are exempt from F&A.

If you've made any edits, select:

- **Save and Apply to Current Period**, or
- **Save and Apply to Current and Later Periods**, as relevant to your proposal

If there are no edits select: **Close**
H. Other Direct Costs screen

1. Entering Costs Line Items in the Budget

Please refer to your sponsor guidelines, specific opportunity instructions, and Institutional Policy and Procedures for budgeting project expenses.

a. Select Add Direct Costs to add all of these costs to be included in the budget.

- Select a Type from the drop-down menu.
- Enter a Description. Descriptions entered here do NOT print on Grants.gov forms, but are useful for proposal preparation notes and Internal Review and Approval.
- Enter a cost in the Funds Requested ($) field – do not use commas.
- Select Calculate to see how this item impacts budget totals. (Coesus will calculate automatically upon Save.)
- Select Remove to delete the entry.
- Select Save to save your entered budget item.

Results after entries:

Budget Other Direct Costs

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laboratory Supplies</td>
<td>Reagents and solvents</td>
<td>$6,000.00</td>
</tr>
<tr>
<td>Printing</td>
<td>In-house publication costs</td>
<td>$2,000.00</td>
</tr>
</tbody>
</table>

Total Other Direct Costs $8,000.00
b. Enter Direct Cost **Line Item Details**

- **Select** *Edit* to the right of each line item to display the **Line Item Details** window; there you may enter more detailed information about each line item.

<table>
<thead>
<tr>
<th>Line Item Details</th>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td>Reagents and solvents</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date:</td>
<td>07/01/2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date:</td>
<td>06/30/2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quantity:</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost:</td>
<td>$5,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost Sharing:</td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Underrecovery:</td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apply Inflation:</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>On Campus:</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit Cost Sharing:</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Rates Applicable to the Line Item**

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td>✓</td>
<td>$3,330.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

The following fields can be modified on the **Line Item Details** window:

- **Description**: Change the line item description as needed.
- **Start Date** and **End Date**: Change if relevant or required based on the sponsor instructions.
- **Quantity**: Enter if relevant or required based on sponsor instructions.
- **Cost**: Change as needed. You will see the changes on the main **Other Direct Costs** screen.
- **Cost Sharing**: Enter a value, if appropriate.
- **Apply Inflation** checkbox: Deselect this option if you want to have this line item generate to all periods at the same dollar value instead of inflated by the rate on the **Proposal Rates** screen.
- **On Campus** checkbox: Deselect this option to apply the Off Campus F&A rate.
- **Rate Types / Apply**: Select and deselect the **Apply** checkboxes as needed.

The following calculated costs can be viewed on the **Line Item Details** window:

- **Underrecovery**
- **Rates applicable to the Line item**: Cost and Cost Sharing amounts.

If you’ve made any edits, select:

- **Save and Apply to Current Period**
- **Save and Apply to Current and Later Periods**, as relevant to your proposal

If there are no edits select: **Close**
2. Enter special Other Direct Costs: Subaward/Subcontracts

Subcontracts - Adding Sub Award Line Items

When a sub award is added to the budget, multiple line items may be required. Per A-21 Cost Principles, most sub awards are subject to F&A for only the first $25,000 of the entire award. The remaining amount over $25,000 is not subject to F&A. Cost elements are available to support this entry requirement.

These Cost Elements do not bear overhead and are not subject to F&A.
   a. Subcontracts Direct – No F&A
   b. Subcontracts Indirect – No F&A

These Cost Elements bear overhead and are subject to F&A.
   c. Subcontracts Direct – Subject to F&A
   d. Subcontracts Indirect – Subject to F&A

COEUS often times requires users to break up Sub Awards into components. When possible first use the Subcontracts Indirect – Subject to F&A cost element to list a Sub Awards indirect costs. If the Sub Awards indirect costs exceed $25,000, then use the Subcontracts Indirect – No F&A cost element to reflect the remaining indirect costs dollar amount that exceeds $25,000.

The Sub Awards direct costs should be entered after listing the Sub Awards indirect costs. The Subcontracts Direct – No F&A cost element is used to reflect the Sub Awards direct costs. Use the Subcontracts Direct – Subject to F&A cost element in situations where the Subcontracts Indirect – Subject to F&A cost element, alone, is below the Sub Awards indirect costs. When such a situation occurs the total dollar amount between the Subcontracts Direct – No F&A and the Subcontracts Direct – Subject to F&A cost elements should be equal to the Sub Awards Direct Costs.

Note: Northeastern University will only take F&A on a maximum of $25,000 of any Sub Award; this means that the maximum amount of F&A that the university is eligible to receive from a Sub Award is $13,875 (which is 55.5% of $25,000).

Example 1
A one year Sub Award in the amount of $21,000: Indirect Costs = $7,000; Direct Costs = $14,000

   a. Our first step would be to click the Add Direct Costs link. A new budget line will appear. To properly enter this particular Sub Award in Coeus we would use two cost elements, so we must add a second budget line.
   b. The first budget line should reflect the Sub Award’s Indirect Costs subject to Northeastern’s F&A, up to a maximum of $25,000.
   c. The second budget line should reflect that Sub Award’s Direct Costs subject to Northeastern’s F&A. This example demonstrates that in cases where the Sub Award’s indirect Costs is less than $25,000 that the Sub Award’s Direct costs would be subject to Northeastern’s F&A as long as the total between the Sub Award’s Direct and Indirect Costs are no greater than $25,000.
**Example 2**

One year Sub Award in the amount of $52,500: Indirect Costs = $17,500; Direct Costs = $35,000

a. This example will require the use of three cost elements and therefore we must enter 3 budget lines.
b. In this example once again note that the Indirect Costs for the Sub Award are below $25,000. The first budget line will reflect the Sub Award’s Indirect Costs subject to Northeastern’s F&A ($17,500).
c. The second budget line will reflect the portion of the Sub Award’s Direct Costs that will be subject to Northeastern’s F&A ($7,500).

**Note:** We do not want the entire $35,000 in direct costs to be subject to Northeastern’s F&A. $17,500 in Indirect Costs has already been subject to Northeastern’s F&A. As this Sub Award is greater than $25,000 we will take the difference between $25,000 and the $17,500 to determine the portion of the Sub Award’s Direct Costs that will be subject to Northeastern’s F&A ($25,000 - $17,500 = $7,500).

d. The third budget line will reflect the remaining Direct Costs of the Sub Award, not subject to Northeastern’s F&A ($35,000 - $7,500 = $27,500). You will recall that $7,500 of the $35,000 in Direct Costs was used to bring the total number of funds from the Sub Award (indirect and direct) that would be subject to Northeastern’s F&A to $25,000.
Example 3

One year Sub Award in the amount of $140,000: Indirect Costs = $40,000; Direct Costs = $100,000

a. This example differs from the prior two in that for the first time we have a Sub Award that has over $25,000 in Indirect Costs. Once again we will require three budget lines for and will use three cost elements.
b. The first line will reflect only $25,000 of the $40,000 in Indirect Costs for the Sub Award subject to Northeastern’s F&A. The remaining $15,000 in Indirect Costs will be entered later.
c. The second line will reflect the Sub Award’s Direct Costs not subject to Northeastern’s F&A ($100,000).
d. The third line will reflect the remaining portion of the Sub Award’s Indirect Costs which will not be subject to Northeastern’s F&A ($40,000 - $25,000 = $15,000).

<table>
<thead>
<tr>
<th>Period Totals</th>
<th>Direct Cost: $140,000.00</th>
<th>Indirect Cost: $13,075.00</th>
<th>Total Cost: $153,075.00</th>
<th>No. of Months: 12.0</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Under Recovery: $10.00</td>
<td>Cost Share: $0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Budget Other Direct Costs

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcontracts Indirect - Subject to F&amp;A</td>
<td>Harvard</td>
<td>$25,000.00</td>
</tr>
<tr>
<td>Subcontracts Direct - No F&amp;A</td>
<td>Harvard</td>
<td>$100,000.00</td>
</tr>
<tr>
<td>Subcontracts Indirect - No F&amp;A</td>
<td>Harvard</td>
<td>$15,000.00</td>
</tr>
</tbody>
</table>

Total Other Direct Costs: $140,000.00

Add Direct Costs | Calculate

Save
3. Other Budgeting Features

a. Cost Sharing

If you need to express cost sharing in your budget, you must do so on each specific line item in the Budget Periods screens of your budget (Equipment, Travel, Participant/Trainee, or Other Direct Costs) that will be cost shared. In the case of Personnel – cost share is calculated by the difference between %charged and %effort.

- Select Edit to open that item’s Line Item Details window
- Enter the dollar value of the funding commitment in the Cost Sharing field.
- Select
  - Save and Apply to Current Period or
  - Save and Apply to Current and Later Periods, as relevant to your proposal or,
  - Close if you decide not to make an entry.

The amount of the cost sharing will also be updated in the Period Totals header and Budget Totals section of the Budget Summary screen.

---

**Result after entry:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Start Date</th>
<th>End Date</th>
<th>Cost</th>
<th>Cost Sharing</th>
<th>Underrecovery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Big Widget</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td>$7,500.00</td>
<td>$7,500.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Budget Equipment** – List items and dollar amount for each item exceeding $5000

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment - Not MTDC</td>
<td>Big Widget</td>
<td>$7,500.00</td>
</tr>
</tbody>
</table>

Total Equipment: $7,500.00
b. Underrecovery

If underrecovery should be applied to your ENTIRE project budget, not just a specific line item, you should adjust the appropriate Rate(s) applied in the Proposal Rates screen and/or the Overhead Rate Type and Underrecovery Rate Type on the Budget Summary screen.

If you need to express underrecovery on a specific line item in the Budget Periods screens of your budget (Personnel, Equipment, Travel, Participant/Trainee, or Other Direct Costs):

- Select Edit to open that item’s Line Item Details window
- Deselect the appropriate Rate Types - Apply checkbox from the Rates Applicable to the Line Item, in the bottom section of the Line Items Detail window.
- Click Save and Apply to Current Period or Save and Apply to Current and Later Periods, as relevant to your proposal, before closing this window.

The amount of the underrecovery will also be updated in the Budget Totals section of the Budget Summary screen.

---

**Result of unchecked Apply MTDC Rate:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic meeting: PI attendance required</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td>$1,850.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Apply Inflation</td>
<td>✅</td>
<td>On Campus: ✅</td>
<td></td>
</tr>
<tr>
<td>Underrecovery</td>
<td>$1,258.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Rates Applicable to the Line Item**

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td>✗</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

---

**Result of unchecked Apply MTDC Rate:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Save and Apply to Current Period</th>
<th>Save and Apply to Current and Later Periods</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic meeting: PI attendance required</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2009</td>
<td>12/31/2009</td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td>$1,850.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Apply Inflation</td>
<td>✅</td>
<td>On Campus: ✅</td>
<td></td>
</tr>
<tr>
<td>Underrecovery</td>
<td>$1,258.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Rates Applicable to the Line Item**

<table>
<thead>
<tr>
<th>Rate Types</th>
<th>Apply</th>
<th>Cost</th>
<th>Cost Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTDC</td>
<td>✗</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
I. Generate All Periods from your Detailed Period 1 Budget

Prior to using Generate All Periods, review the Proposal Rates screen and review and revise the Inflation Rates, if necessary. Consider deselecting the Apply Inflation checkbox on specific line items instead of entire categories in the Rates, if this is more appropriate for your proposal budget.

Complete any Period 1 recurring expenses required for your budget and then use the Generate All Periods feature to calculate all budget periods for your proposal.

**Note:** If you do *not* want a line item to appear in every period, do not include it in Period 1. Generate All Periods first, and then enter that line item in the appropriate period(s).

The Generate All Periods option on the Budget navigation menu will disappear after application. Once the budget periods are generated, you cannot “undo” the process.

You *can* manipulate the data in each budget period to alter the results (see the section Adjust by Period), or you can create a new budget version (see the section Budget Versions: Create Alternate Versions of your Budget).

Coeus uses the Budget Period start and end dates, inflation percentages and other rates from the Proposal Rates screen, and the line item costs entered in the Budget Period screens to calculate expenses and generate each requested budget period.

Prior to using Generate All Periods, follow the steps below to review your budget entries.
1. Preview All Budget Expenses

Before using the **Generate All Periods** function, it is good practice to preview your budget entries in all categories by printing a report.

- Click **Print** on the Budget menu.
- From the **Proposal Print** screen, click **Budget Summary by Period**.
- A new browser window will open to display the Internal Budget Summary view of your budget, by period, in a PDF format. This complete budget will display by Category and Sponsor Budget Group.
- Personnel, by name, will print out with Start and End dates, Fringe Rates applied (if appropriate), Fringe Benefit costs (if appropriate), and Salaries & Wages.
- Descriptions entered for all budget line items will print on this Summary form.
- The Calculation Methodology page of the summary lists any items excluded from the F&A base costs requested, the F&A rates and bases, the Employee Benefit rates and bases, and Vacation Accrual Rates and bases.

---

**Coeus Proposal Development - Budget Summary**

<table>
<thead>
<tr>
<th>Category</th>
<th>Start Date</th>
<th>End Date</th>
<th>EB Rate</th>
<th>Vac Rate</th>
<th>Percentage</th>
<th>Fringe</th>
<th>Salaries &amp;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Category</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hanlon, Rosemary</td>
<td>02/01/09</td>
<td>12/31/09</td>
<td>24.00%</td>
<td>9.50%</td>
<td>25% / 25%</td>
<td>$7,603</td>
<td>$23,292</td>
</tr>
<tr>
<td>Computer Programmer</td>
<td>02/01/09</td>
<td>12/31/09</td>
<td>24.00%</td>
<td>9.50%</td>
<td>50% / 50%</td>
<td>$12,263</td>
<td>$30,667</td>
</tr>
<tr>
<td>Seuss, Doctor</td>
<td>01/15/09</td>
<td>12/31/09</td>
<td>24.00%</td>
<td>9.50%</td>
<td>25% / 25%</td>
<td>$7,471</td>
<td>$22,503</td>
</tr>
<tr>
<td>TBA - Project Coordinator</td>
<td>02/01/09</td>
<td>12/31/09</td>
<td>24.00%</td>
<td>9.50%</td>
<td>100% / 100%</td>
<td>$9,212</td>
<td>$27,600</td>
</tr>
<tr>
<td>Other Professionals Total</td>
<td>$36,770</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$109,761</td>
</tr>
<tr>
<td>Graduate Students</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TBA Research</td>
<td>02/01/09</td>
<td>12/31/09</td>
<td>10%</td>
<td>10%</td>
<td>0%</td>
<td>$0</td>
<td>$1,633</td>
</tr>
<tr>
<td>Total Graduate Students</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$1,633</td>
</tr>
<tr>
<td>TOTAL SALARIES &amp; WAGES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$111,394</td>
<td></td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$36,770</td>
<td></td>
</tr>
<tr>
<td>TOTAL SALARIES &amp; WAGES &amp; FRINGE BENEFITS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$148,164</td>
<td></td>
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<tr>
<td>Equipment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment - Not MTDC - Big Widget</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$7,500</td>
<td></td>
</tr>
<tr>
<td>Total Equipment</td>
<td>$7,500</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Materials and Services - minor equipment-server memory upgrade</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$3,000</td>
<td></td>
</tr>
<tr>
<td>Total Materials</td>
<td>$3,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publication Costs/Documentation/Dissemination</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$2,500</td>
<td></td>
</tr>
<tr>
<td>Printing - in-house publication costs - supplies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$2,500</td>
<td></td>
</tr>
<tr>
<td>Total Publication Costs/Documentation/Dissemination</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$5,000</td>
<td></td>
</tr>
<tr>
<td>Trainee/Participant costs - Stipends</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$40,000</td>
<td></td>
</tr>
<tr>
<td>Stipends - Not MTDC - 10 Trainees, 2 months each</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$40,000</td>
<td></td>
</tr>
<tr>
<td>Stipend</td>
<td>$40,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Calculation Methodology**

The full F&A (Indirect Cost Rate) is applied to the total direct costs, less the following exclusions:

- Equipment - Not MTDC - Big Widget - $7,500
- Stipends - Not MTDC - 10 Trainees, 2 months each - $40,000
- Travel Expenses - Domestic Meeting - $1,650

Total exclusions from F&A base - $49,350

The Allocated Administrative Support and Allocated Lab Expense Rates are applied to the total direct costs, less the following exclusions:

Total exclusions from Allocated Expense base - $0

---

This is the budget format displayed during the Coeus Web Proposal Approval process.

You can print and/or save this PDF file for distribution by email or hardcopy to proposal participants for their review.
2: Generate all Periods

Select Generate All Periods on the menu. This will start a process which will use all of the Period 1 line items to create details for subsequent periods.

   a. A warning screen will appear to alert you of the one-time-use per budget of the Generate option. Click Generate Periods on this screen to continue.

   b. A confirmation screen will display upon completion.

3: Adjust budget by period

Enter each budget category screen (Personnel Budget, Equipment, Travel, Participant/Trainee, or Other Direct Costs) to review the line items and make adjustments per period as needed. You can edit, remove or add line items as appropriate for your project requirements.

For example:

- Add and remove Personnel
- Adjust Personnel effort, or period of performance
- Add or remove expense line items
- Adjust costs generated on line items
On this screen, you can review your project costs: direct and indirect costs (totals and by project period), underrecovery, cost sharing (totals and by project period), and total costs (total and by project period).

Be sure to review the **OverHead Rate Type** and **Underrecovery Rate Type** applied for this proposal.

**Things you can modify on the Budget Summary Screen:**

- Change the **Budget Status** drop-down to **Complete** once you have completed the budget (this can also be done on the **Budget Versions** screen). Note: The budget version must be marked Final before it can be marked Complete.

- Select the **Final** checkbox to allow the transmission of this budget to the sponsor (this can also be done on the **Budget Versions** screen).

- Select the **Modular Budget** checkbox if this budget will be an NIH Modular budget.

- Select the **On/off campus** option if necessary.
  - Select “Off” to have Coeus apply the maintained Off Campus Overhead rates to all the budgeted cost elements, despite the cost element description of On Campus.
  - Select “On” to have Coeus apply the maintained On Campus Overhead rates to all budgeted cost elements, despite the cost element description of Off Campus.
  - Select “Default” to have Coeus apply the maintained OH rate for that cost element. Default allow for the inclusion of both On- and Off-campus rates in the budget.

- Enter **Residual Funds** (refer to sponsor guidelines for requirement definitions).
- Enter a **Total Cost Limit** (reference only – this will NOT restrict your CoeusLite budget).
- Enter a **Direct Cost Limit** (reference only – this will NOT restrict your CoeusLite budget).
- Change the **Over Head Rate Type** and/or **Underrecovery Rate Type**.
- Enter text in the **Comments** field to make notes about this budget *(For internal use only)*.

Once you have completed your changes to this screen, Select **Save**.
K. Budget Versions Screen

a. Create Alternate Versions of your Budget

This screen displays a summary of all budget versions created in the proposal. If you have created more than one version of the budget, you must click Open link to the right of the budget version you want to access.

Things you can do on the Budget Versions Screen:

- Change the Budget Status of a selected version to Complete or Incomplete (you cannot edit a budget marked Complete).
- Select or deselect the Final status checkbox. You must do this either on this screen or on the Budget Summary screen prior to routing for approval.
- Navigate to the Budget details of a particular version; select Open the right of the budget version.
- Create an alternate budget scenario by copying an existing version of the budget, click Copy – you can choose to copy only period one, or all periods, depending on how many changes you’d like to make
- Create alternate budget scenario, select the Add New Version link to start a new, blank budget.

Once you have completed your changes to this screen, select save.

Once you have more than one version of the budget, you will always be brought to this screen when you navigate to Budget. You must click Open to the right of the budget version you want to access.
**NIH Modular Budgets**

Currently Modular budgets are a submission option for certain NIH opportunities ONLY. Review the specific funding opportunity to determine if Modular budgeting is an option or a requirement, as well as the module limits per budget period.

**Note on Modular Budgets (NIH):** Even if you are required to submit only a Modular budget (and not a detailed budget) to NIH, creating a detailed budget will assist you by populating the Modular Budget form. A Coeus detailed budget calculates indirect costs, which are required for these forms and can populate your calculated indirect costs to the Modular Budget screen, making finalizing your budget much quicker.

Create a detailed budget in CoeusLite. Then create the Modular budget; manually enter the required details in the Modular Budget screen in order to populate the mandatory forms.

![Budget Summary Screen]

You *must* select the Modular Budget option on the Budget Summary screen in order for Coeus to populate your Modular budget information on the Grants.gov PHS Modular Budget Form.
L. Modular Budget Screen:

1. With a Final Coeus detailed budget marked Modular on the Budget Summary screen, open the Modular Budget screen to sync the data for Direct Costs, Consortium F&A (subcontractors), and Indirect Costs data for the PHS form.

   a. Select Modular Budget on the Budget menu

   b. Select Sync with Detailed Budget

   c. Select OK when the confirmation window opens.
      - Review the data defaulted in each of the Period tabs.
         o All the white-background fields are editable: review each period and adjust the amounts, if needed.
         o It is especially important to review the Direct Cost less Consortium F&A field to reflect the appropriate number of $25,000 modules
         o Review each Rate Number row, especially if Off campus rates are utilized in the budget, or if multiple Fiscal Year Rates are present for a budget period crossing Fiscal Years with varying maintained F&A rates.

   d. Select Save.
2. If you have NOT prepared a detailed budget in Coeus, you must manually enter the required costs in the Modular Budget screen. (You must still check the Modular option on the Budget Summary screen.)

For Period 1:

a. Select Modular Budget.

b. Enter the Direct Cost less Consortium F&A amount.

c. Enter Consortium F&A costs (if any).

d. Select Add Indirect Cost to create an entry line for the Indirect Cost data.

- Enter Indirect Cost Type: MTDC, or as appropriate for your institution.
- Enter IDC Rate (%) – field expressed as a percentage – enter whole numbers.
- Enter IDC Base (from your non-Coeus Detailed budget).
- Enter Funds Requested ($).

e. Select Save.

f. Repeat entries as needed for all remaining periods by clicking the Period 2 tab, Period 3 tab, etc.

g. Review the Cumulative screen to confirm totals.
M. Cost Sharing Distribution

- Select **Cost Sharing Distribution** from the left Navigation bar.
  
  If Cost Sharing commitments have been generated in the budget periods, the amounts will be displayed in the **Total Cost Sharing Amount** panel.

  **Note:** Cost Sharing Distribution must equal Cost Sharing amount for each Budget Period.

Use the **Cost Sharing Distribution List** panel to identify the source(s) of funding support for the commitment. The initial list will be generated with a line for each fiscal year a cost sharing commitment exists, but additional lines can be added to have multiple sources for each fiscal year.

- Enter the Banner Account Code in the **Source Account** field for each Fiscal Year Commitment.
  
  - If needed, use **Add Cost Sharing Distribution** to generate a new entry line.
  
  - Use **Remove** to delete an unnecessary entry line.

- Select **Save**

As maintained with a single Source Account entered for each fiscal year.

If you have not incurred cost sharing in your budget, you will receive a notice instead of the distribution screen.
N. Under Recovery Distribution

- Select Under Recovery Distribution from the left Navigation bar.

If Under Recovery commitments have been generated in the budget periods, the amounts will be displayed in the Under Recovery Amount panel.

**Note:** Under Recovery Distribution must equal Under Recover Amount for each Budget Period.

Use the Under Recovery Distribution List panel to identify the source(s) of funding support for the commitment. The initial list will be generated with a line for each fiscal year where a commitment exists, but additional lines can be added to have multiple sources for each fiscal year.

- Enter the Rates for each Fiscal Year, Select On or Off Campus, Amount, and 000000 in the Source Account field.
  - If there are no Off Campus expenses, remove those lines from the panel.

- If needed, use Add Under Recovery Distribution to generate a new entry line.
  - Enter a Rate, Fiscal Year, On/Off Campus, Amount, and 000000 in the Source Account field.

- Use Remove to delete an unnecessary entry line.

- Select Save
O. Project Income

To enter Project Income in your budget:

1. Select **Project Income**

   ![Project Income Summary](image)

   ![Project Income Details](image)

   ![Add Project Income](image)

2. Select **Add Project Income**.

   ![Project Income Summary](image)

   ![Project Income Details](image)

   ![View Remove](image)

   ![Add Project Income](image)

   ![Save](image)

3. Select the **Period** from the drop-down menu.

4. Enter the anticipated **Income** funds.

5. Enter a **Description**.

6. If you need to enter a more detailed description of the Income funds, select **View** to the right of the line item and enter your comments.

7. Select **Remove** to delete the entry.

8. Select **Save**.

Repeat for each period with Project Income to report.
P. Budget Validations

Business Rule Validations for Proposal Budgets.

Coeus can now provide budget-specific validation rules. Users can manually perform the validations prior to finalizing their budgets but budget validation rules will be run automatically, along with proposal validations, when a budget is marked Complete. If the budget fails the validation rule, it cannot be marked Complete. The user will be presented with an error notice and be advised to return to the budget and fix the error condition.

Budget Validation Errors:

- If a proposal budget fails a validation rule, a red error notice is presented to the user.
- The Department (unit) where the rule is applied appears in the alert text, as validation rules can be applied at any level in the hierarchy.
- The text from the validation rule’s User Message should be specific as the budget cannot be marked Complete until the budget can pass the validation.
- If more than one budget validation rule failed, all user messages will be presented with a red Error heading.

Budget Validation Warnings:

- Validation Warnings are presented under a blue validation notice.
- The Department (unit) where the rule is applied appears, as validation rules can be applied at any level in the hierarchy.
- Warning messages do not keep a budget from being marked Complete.
- If more than one budget validation warning was triggered, all user messages will be presented with a blue Warning heading.
Q. Finalize Your Budget

Before submitting a proposal for approval routing, you must mark your budget as Final and Complete.

Navigate to the Budget Summary screen.

Select the Final checkbox to mark this version of the budget as Final. (Note: this indicates that only this version of the budget will be transmitted to the sponsor.) You can also indicate this Final status on the Budget Versions screen.

Select the Modular Budget check box if you are submitting this budget as Modular to NIH ONLY.

For Modular budget, you must also select the INCLUDE checkbox on the PHS398 Modular Budget form on the Grants.gov screen to validate and transmit the modular budget with your proposal.

Select Complete from the Budget Status drop-down menu.

Select Save.

Navigate to Return to Proposal.
### 13. Upload Attachments

Select **Upload Attachments** screen.

There are three (3) areas where files can be uploaded:

| **Upload Proposal Attachments** | These documents or files are required as defined by the sponsor opportunity instructions and their general submission guidelines. A base list of types will always be presented. To display the types required for Grants.gov submissions, an opportunity must already have been selected in **General Info** for this proposal. |
| **Upload Personnel Attachments** | These are person-specific files (biosketch, current & pending, etc.) |
| **Upload Institutional Attachments** | These are institutional attachments that do not get submitted to the sponsor. |

Proposals to be submitted through Grants.gov must be linked to their sponsor’s opportunity using the Grants.gov before you begin to upload attachments. This linking process imports into your Coeus proposal the form-specific attachment types required by the funding opportunity.

For **Proposal Attachments**: Coeus will filter the narrative types and present only those relevant to your submission. For Grants.gov submissions, the types presented will only be those relevant to the forms used in the opportunity selected.

Though most Attachment Types are restricted by sponsors, and by Coeus, to a single use per proposal, several Types may be used multiple times, including (but not limited to): Other, Additional_Key_Persons, and Additional_Equipment. When using one Attachment Type multiple times, each attachment must contain a unique Description.
A. Upload Proposal Attachment Instructions:

- **Select** the Proposal Attachment tab
- **Select** an Attachment Type from the drop-down list (list varies by opportunity selected)
- **Enter** a Description (may be required for some narrative types or per the sponsor instructions)
- **Select** Browse to find and upload your file.
- **Save**: Result: the file is added to List of Proposal Attachments.
- **Note**: For Grants.gov proposals, file placement is dictated by the Attachment Type you choose – NOT the order in which you upload the files

The file is now added to List of Proposal Attachments.

- **Select Remove** to delete the uploaded file and attachment type
- **Select View** to open the file in a new browser window

Repeat for all required Proposal Narrative Attachment Types.

**NOTE**: For Grants.gov submissions, PDF and filename requirements still apply. Refer to your sponsor opportunity or general submission guidelines for required uploads.
Refresh Proposal Attachment instructions:

- Navigate to the **Upload Narratives** screen.
- Click on the Tab where the narrative was initially maintained.
- Locate the narrative to be **updated**.
- **Click on the narrative FILE NAME** – first cell in table – NOT the View button.
- At the top of the screen, the **Upload New File** button appears (where the Browse button appears in Modify mode).
- Select **Upload New File**.
- Browse for your replacement file; select and save it to return to the Add Document screen.
- **Save**.

**NOTE**: If a Narrative is refreshed while the proposal is in Approval In Progress status; an email message will be sent to all proposal approvers that a file has been updated (the module number will be identified).
B. Upload Personnel Attachment Instructions

- Select the Personnel Attachment tab
- Select an Attachment Type from the drop-down list
- Select the Person relevant to the file being uploaded. (List generated from Investigators & Key Persons entries.)
- Enter a Description (required)
- Select Browse to find and upload your file
- Select Save

The Person and file is now added to List of Personnel Attachments.

- Select Remove to delete the uploaded file and attachment type
- Select View to open the file in a new browser window

Repeat for all required Personnel and Personnel Narrative Attachment Types.

Refer to your sponsor opportunity or general submission guidelines for required uploads.
C. Upload Institutional Attachment Instructions

- Select the Institutional Attachment tab
- Select an Attachment Type from the drop-down list
- Enter a Description (Required)
- Select Browse to find and upload your file
- Select Save

Person and file are now added to List of Personnel Attachments.

- Select Remove to delete the uploaded file and attachment type
- Select View to open the file in a new browser window

Repeat for all required Institutional Attachments Types.

Refer to your institutional policy or submission preparation instructions for required uploads.
14. Institutional Validations

Select **Validate** to check your proposal against any validation rules which will help you verify that your proposal is complete and ready to be submitted for approval. Review any messages that appear and verify that appropriate files have been uploaded, questions answered, investigators certified, etc.

Several categories of validations may be processed on your proposal:

**Coeus Proposal Validations**: Several fundamental items must be completed to route your application, such as:
- Answering all the Yes/No Questions
- Certifying all the Investigators
- Completing Mandatory Questionnaires
- Marking a budget Final and Complete
- Any locally-defined business rules applicable to your institute’s rules and regulations.

**Coeus Budget Validations**: Your local Coeus Administrator may have created Budget-specific business rules. These budget validation rules will be processed during this Validation.

**Grants.gov Submission Validations**: If your application is to be submitted electronically via Grants.gov and you’ve selected and saved a valid opportunity, the s2s validation check will also be performed. Examples include:
- Missing a Budget (such as not selecting Modular on the Budget Summary)
- Missing Narrative uploads for mandatory forms (such as Biosketches for RR Key Person form)
- Missing eCommons User ID for NIH submissions

Make any corrections, additions, or changes as required and then perform the validation again. Once you pass the validations, you are ready to submit your application for approval routing.

15. Submit for Approval

Select **Submit for Approval** when the proposal is **complete** (i.e., checked and validated) to begin routing for internal approval. The proposal must be complete for this process to begin. If it is not, Coeus will alert you to the non-compliant sections (i.e. Yes/No Questions unanswered, budget not marked final, etc.)

**Before you try to submit:**
- Finalize your proposal:
  - Mark your budget as **Final and Complete** on the **Budget Summary** screen
  - Select Validate from the navigation menu on the left of the summary screen, or navigate to the **Grants.gov** screen and select **Validate**;
    - Respond to any errors displayed – make the necessary corrections.
    - **Validate** and make necessary corrections until the **Validations Successful** message is displayed.
16. Print

Select **Print** to open the print options screen

- **Sponsor Form Packages** are for paper submittals:
  - Select **Show** or **Hide** to expand the available forms
  - Select **All** to check all the forms available in the displayed group; **None** to deselect; or select individual forms.
- **Grants.gov** are the Grants.gov forms for **s2s submissions**:
  - Select **Show** or **Hide** to expand the available forms
  - Select **All** to check all the forms available in the displayed group; **None** to deselect; or select individual forms.
  - Select **Print Selected** to print. A new browser window will open to display your PDF document.
17. Copy Proposal

Copying an existing proposal is especially useful for preparing a Grants.gov Change/Corrected, or for updating and resubmitting a similar work to the same or another sponsor:

From My Proposals or Search – Find the proposal you want to copy

You must have the Aggregator Role in order to copy all Narratives and Budget.

Select the proposal title to open the proposal
Select Copy Proposal from the left navigation bar

If you are authorized to create proposals in more than one Unit, you will be prompted to select a Lead Unit.

When the next screen appears:
Select Copy Budget – Click the checkbox if you wish to copy budget details. Once selected, choose to copy all budget versions or only the budget version marked as Final.
Note: If you select Final Only, and a budget is not marked as final, no budget will be copied to your new proposal.
Select Copy Narratives (if appropriate – most of these files will need to be replaced for all but Change/Corrected applications).

Your Copied Proposal will be created and appear on My Proposals screen – the highest proposal number on your list.

Return to My Proposals to open the copied proposal.

Update your Copied Proposal elements!
1. Edit all elements that require changing.
2. Link to the Grants.gov opportunity and forms (the CFDA and/or Funding Opportunity Number info will copy, but you still need to complete the link.
3. Re-certify Principal Investigator.
4. Open Upload Attachments Section to verify narrative types are still appropriate. Add or change as necessary.
5. Mark budget version and final and complete.

When Copied Proposal Narratives require special attention:

For example: NIH modified their research plan narrative requirements for submissions after January 25, 2010. Therefore, a copy of an NIH R01-style proposal submitted prior January 25, will contain all the narrative types used in the previous submission – several of these types have been retired and replaced by a single narrative. When the valid Grants.gov opportunity is linked, the user should review the current sponsor requirements and add the required narrative type for the new submission. While the extra (copied) narrative types & files won’t be transmitted to the sponsor, it is advised that the user delete the narratives that are no longer relevant to avoid confusing the internal reviewers.
18. Send Email Notifications from your proposal.

Navigate to Email
- Select **Add Employee** to search the Coeus Person table HR data.
- Select **Add Non Employee** to search the Rolodex.
- Select **Add Role** to select a pre-defined approver on your Routing Map.

Selected person(s) will be inserted on to the **To:** line to receive your message.

Enter a subject in the Subject line field provided.

Enter a message in the text box provided.

Select **Send.**

Coeus will send an email notification to the recipient(s).
19. Add New Rolodex Entry

The Coeus Rolodex is used to maintain contact and organization information for people you want to include in your proposals that are not part of your institution. Whenever you search for non-personnel, you search in the Rolodex. Collaborators from other universities or research organizations, consultants, new hires that have been identified but not yet added to your personnel database are just a few examples of persons that would need to be found in the Rolodex. Once a Coeus rolodex entry has been created, it stays in the database and is available for quick and easy entry in any proposal.

Navigate to Add New Rolodex Entry

Enter the required fields

The following fields must be present for use in Grants.gov submissions. Once Rolodex entries are created, they are available to ALL Coeus users – so even if your submission is NOT Grants.gov, please fill in all these fields.

ONLY use letters (uppercase/lowercase A-Z, a-z), numbers (0-9), hyphens (-) and underscore (_). Special characters like an umlaut ü) will cause an error in transmission to Grants.gov.

- Name (Last and First),
- Address (street address on the first line; other lines are optional),
- City
- State
- Postal Code
- Country
- Phone,
- E-Mail

Select Save

After saving, you’ll be provided with the new Rolodex ID:

You must have authorization from your Coeus Administrator to create Rolodex entries. Contact your administrator to grant you the Rolodex Maintainer role, or ask the administrator to create the Rolodex entry for you.
20. Approval Routing (available after submitted for approval)

Locate the submitted Coeus proposal in My Proposals
Select Approval Routing

The routing path for the proposal is displayed, with the approval status displayed.

Select Show to expand the approval box
Select Hide to minimize the approval box
Select Hierarchy to see the Approval Map Hierarchy view.
Select Hide Legend to hide the panel of legend icons.
21. Grants.Gov Submission Details status:

- Locate the submitted Coeus proposal in **My Proposals**
- Select **Grants.gov**
- Select **Refresh** from options at the bottom of this screen to update the data

**Items on this screen:**

<table>
<thead>
<tr>
<th><strong>Received Date:</strong></th>
<th>This is timestamp for your submittal being processed into Grants.gov.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last Modified Date:</strong></td>
<td>This displays the most recent refresh timestamp. Coeus refreshes submittals on an ongoing basis until the submission process is complete. Users can refresh manually.</td>
</tr>
<tr>
<td><strong>Submission Status:</strong></td>
<td>Data provided back by Grants.gov. Not all sponsor supply data back via Grants.gov.</td>
</tr>
<tr>
<td><strong>Grants Tracking Id:</strong></td>
<td>The Grants.gov tracking number</td>
</tr>
<tr>
<td><strong>Agency Tracking Id:</strong></td>
<td>Agency-assigned tracking number – not all agencies provide data back via Grants.gov.</td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
<td>Information provided by Grants.gov.</td>
</tr>
<tr>
<td><strong>Attachments:</strong></td>
<td>List of all uploaded documents submitted.</td>
</tr>
</tbody>
</table>
Appendix A: When to Contact Your RAF Grant Officer:

1. Your Grants.gov proposal includes a Subaward that requires transmission of the detailed Subaward budget file to Grants.gov

2. Your proposal requires budgeting of multiple sub-projects and you want Coeus to link the proposals and build a hierarchy.
   A proposal hierarchy can be helpful if you need to build separate budgets to submit as one:
   - Co-Investigators in other departments with Lab Allocations
   - Separate budgets and/or tasks by child accounts
   - Separate a budget with a specialized F&A rate

   You can create and complete your individual proposals in Lite but creating the hierarchy and linking and unlinking the child proposals to the parent proposal must be done in Premium. Once separate proposals are created, one of the proposals can then create the Parent proposal, and as many child proposals can be linked as are needed.
   - While a proposal is linked in a hierarchy, it can only be viewed in Lite. Unlink the proposal from the hierarchy to continue modifications in Lite.
   - The hierarchy parent proposal can only be modified in Premium.

3. You have a complex budget and need to:
   - Sync your period costs to a total period cost limit
   - Sync your period costs to a direct cost limit.
   - Display customizable views of your Coeus budget; e.g. display a cost-sharing column for each line item
   - Change the budget category of a line item for this proposal, such as: publishing a Post Doc to the Senior Personnel section of the RR Budget.
   - You prefer to budget by cost element (GL# not by category or description)
   - You want to see all expense line items in one screen while budgeting
   - You have predefined, exact personnel cost totals that must appear by category, not by person.

4. You need to re-order your Proposal Personnel to change the order they are listed in the RR Key Person (Expanded) form.

5. You want to see the Routing Map for your proposal before you Submit for Approval:

6. You need to maintain Proposal Person Citizenship details:
   - Some sponsor forms require citizenship details, which can only be maintained in the Premium Proposal Person Details screen. (NIH Fellowship & Career Development forms)

7. You need to maintain Proposal Person details:
   - You need to modify the Person-Editable fields that have been defined by your institution.
   - You want to maintain the Salary Anniversary Date for your proposal budget persons for all proposals.
   - You want to maintain the NIH eCommons login ID as the default id for your investigators.
   - You want to upload Biographies or Current & Pending documents to the Person “central repository” so they can be downloaded automatically to any proposal.

8. You want to enter a Science Code (for institutional reporting/tracking/keywords):
   - Premium allows you to search for and add a maintained Science code on the Science Code tab. Once entered in Premium, the code will not be displayed in the Lite proposal, but will still be in effect and modifiable in the Premium proposal until submitted for approval.