



Coeus Premium

Institute Proposal Guide

Overview & Field Definitions

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Institute Proposal Overview

The Institute Proposal Module contains proposals that have been submitted to sponsoring organizations for funding. Each proposal that has been officially submitted by the organization to the external sponsor and is assigned a unique identifier. Through this identifier, the user can view basic data on funding source, title, department, principal investigators, and amount proposed. You can also view indirect costs, cost sharing and special review information. Coeus is designed to allow users to view current and pending proposals per Principal Investigator. Once a proposal is funded, the information in the Proposal Module forms the basis of the award. The Institute Proposal module can only be viewed in Coeus Premium.

There are two methods of creating an Institute Proposal record: a proposal development record that has been submitted by Research Administration or an Electronic Information Sheet (eIS) record submitted to Coeus by Research Administration.

The Institute Proposal module contains historical data on proposal submissions dating back to FY96 (data prior to FY06 was converted from the legacy system, ReSource).

Navigation and Toolbars

Coeus Main Toolbar











Institute Proposal Search Screen Toolbar

Icon	Action	Icon	Action
	Create a New Proposal		Add or Display Notes about Proposal
	Correct Proposal		Medusa; Displays relationships between Awards, Proposals, and Subcontracts
	Display Existing Proposal in view-only mode		Sort the Proposal entries in the displayed list
	Create a New Entry/ Sequence for a Proposal		Search for a Proposal entry
	IP Review (Currently not used.)		Save changes on Proposal or Save data in displayed list
	Link to Negotiation related to Proposal		Close the Proposal window

Institute Proposal Toolbar (when Viewing an Institute Proposal record)

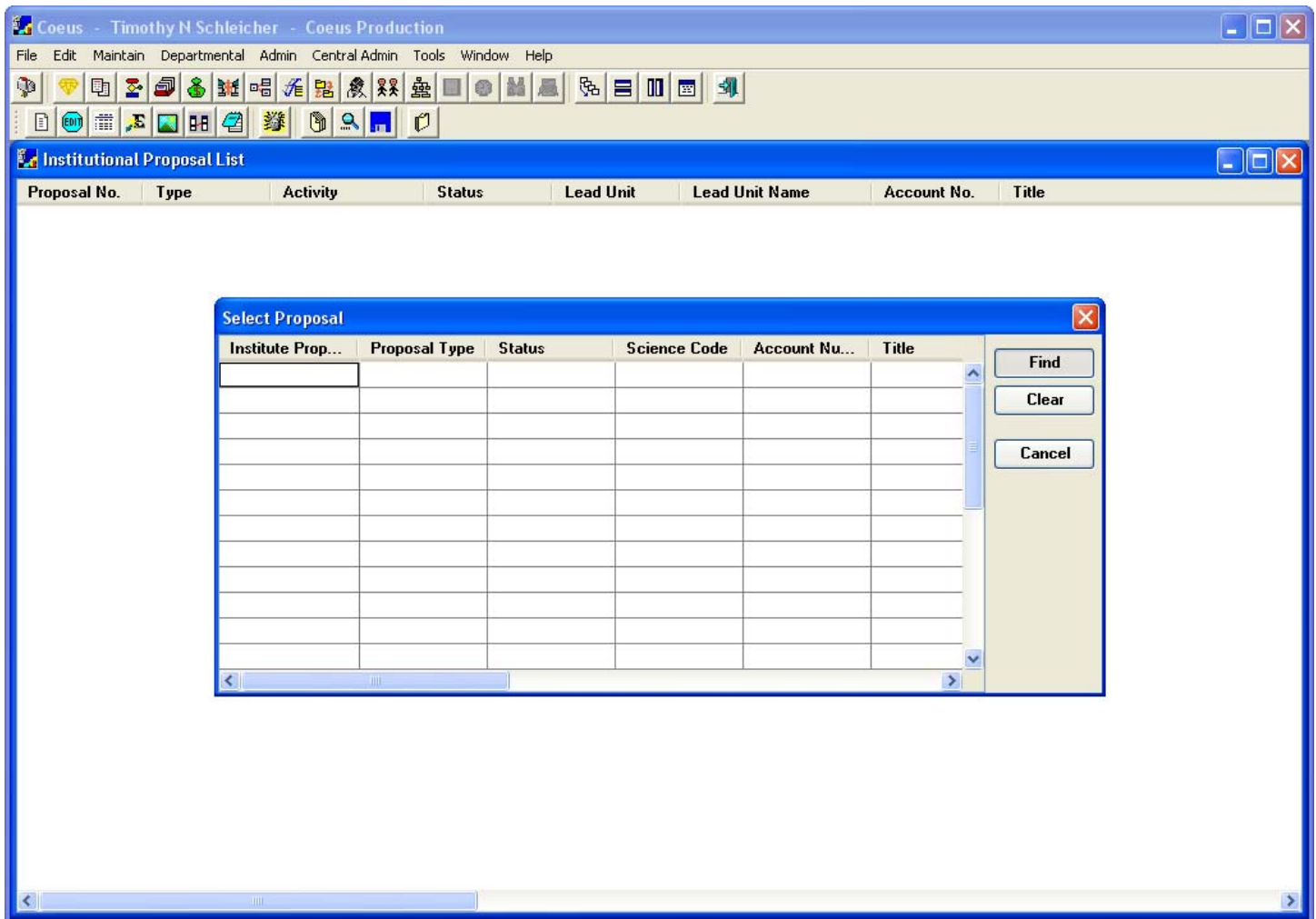


Icon	Action
	View next institute proposal on search results list.
	View previous institute proposal on search results list.
	Generates a pdf proposal summary (similar to the eIS) which can be printed, emailed, or saved.
	View the notepad notes for the institute proposal.
	Medusa; Displays relationships between Awards, Proposals, and Subcontracts
	Send mail notifications with a link to this Institute Proposal record.
	Save is only available to Research Administration offices.
	Close the Institute Proposal.

Searching the Institute Proposal Module

When you open most Coeus modules, a search screen immediately appears. To access the Coeus Institute Proposal module, from the File menu select **Maintain>Institute Proposals**. If this menu option is dimmed, it means you do not have the correct authorizations to view Institute Proposal records. Coeus user accounts and role maintenance is performed at the department, lab or center level. Contact your department administrator, or email coeus-help@jhu.edu, to find out who is responsible for maintaining your Coeus user account.

In this case, the Institute Proposal search screen appears.



Notice that there are several columns. You can use the scrollbar at the bottom to view more columns to the right. Each column represents a field in the Proposal module. You can search for a proposal using any of these columns. For example, if you know the proposal's title, you can search for it using the **Title** column.

There are two ways to search: exact match searching and wildcard searching. In both methods, you can use the and/or search functionality.

Exact Match Searching

The following fields are available as search criteria:

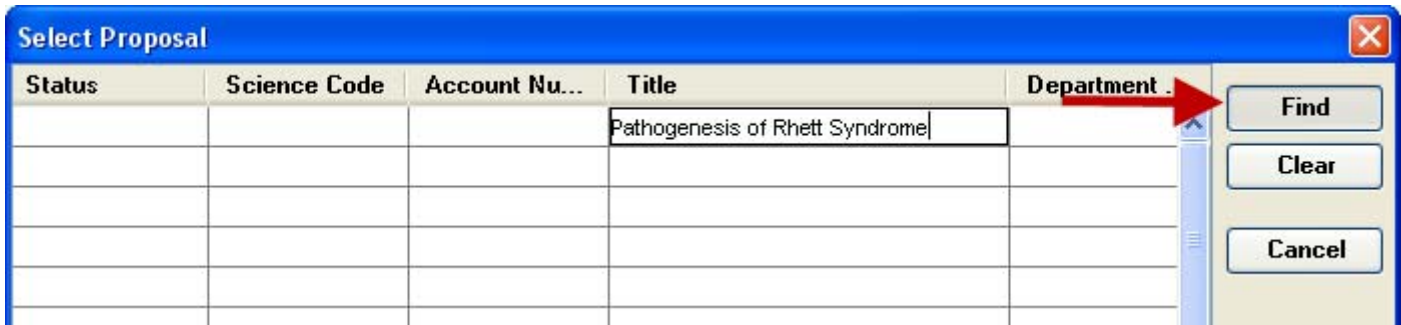
- Institute Proposal Number – Search based on the Institute Proposal number (or some part of it by using wildcards)
- Proposal Type – Search based on the type of proposal (see Proposal Type table definitions below)
- Status – Search based on the status of the Institute Proposal record.
- Science Code – Search based on the drop down list of Science Codes.
- Account Number – Search based on the last 7 digits of the SAP GM Sponsored Program number.
- Title – Search based on the project title.
- Department Number – Search based on the first 8 digits of the SAP Cost Center.
- Unit Name – Search based on the name of the Department, Lab or Center.
- Investigator – Search based on Investigator name. This search will return all records where the person identified is named as a Principal Investigator, Multi-Principal Investigator, or Co-Investigator.
- Sponsor Code – Search based on the SAP Sponsor Code.
- Sponsor Name – Search based on sponsor name.
- Announcement # - Search by the funding opportunity announcement (must have been entered in proposal development or the eIS).
- CFDA # - Search by CFDA (must have been entered in proposal development or the eIS)
- Has Subcontract – Drop down menu with Yes or No as criteria. Used to find Institute Proposal records which contain a subcontract as part of the proposal.

You will use the horizontal scroll bar at the bottom of the search criteria window to view additional columns to the right.

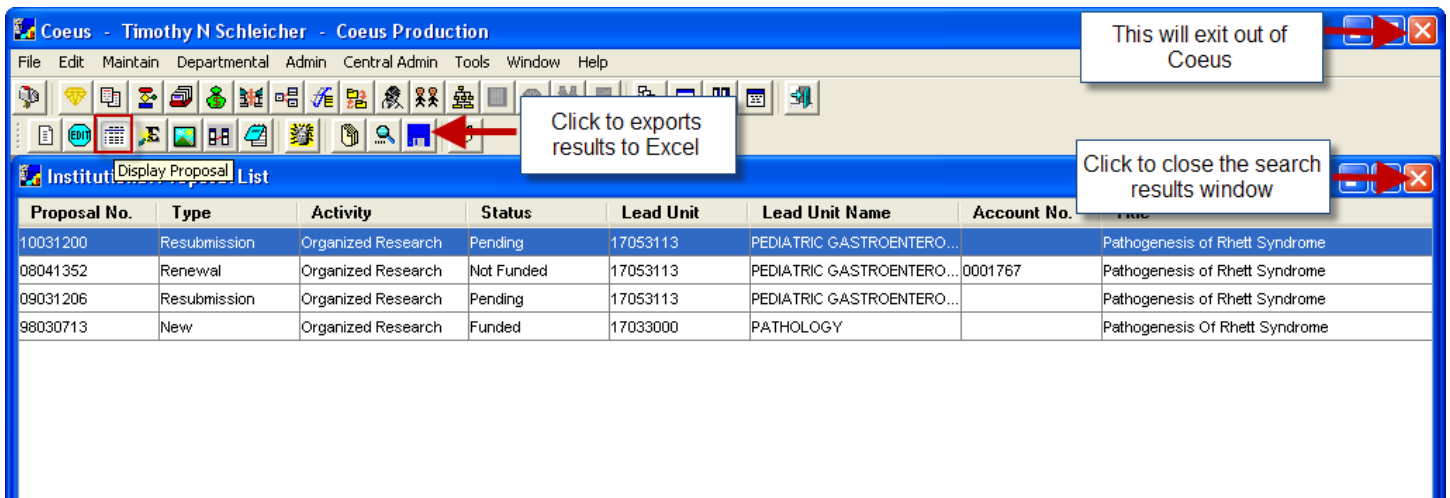
*Additional search criteria may be added to this window as business needs change.

Conduct a search using Title

To perform an exact match search using the **Title** column, you enter the exact title of the proposal and then click on the **Find** button at the right.



The results of your search are displayed in a new window inside Coeus (see image on next page). The results will show all proposals with the exact title that was typed in. In this case there were four matches. The search results can be sorted by any of the column heading by simply clicking on the column header. To reverse sort, click twice. To return the results to the default sort order, click three times. You can also export the search results to Excel by selecting the **Save As** icon.



Viewing a record

To view details of the Institute Proposal record your Coeus user profile must have the role to perform this task (View Institute Proposal) for the unit. To view the proposal (the record highlighted in blue) in the search results list, double-click on it or click on the **Display Proposal** Icon (see Icon reference table above):

Display Institute Proposal 10031200 Sequence 1

Proposal | Mailing Info | Investigators | Cost Sharing | IDC rates | Special Review | Science Codes | IP Review | Others

Proposal No: 10031200 Seq No: 1 Award Number: Status: Pending

Title: Pathogenesis of Rhett Syndrome

Proposal Type: Resubmission Sponsor Prpsl No:

Account: Activity Type: Organized Research

NSF Code: Notice Of Opportunity:

Anticipated Award Type:

Sponsor: 300679 KENNEDY KRIEGER INST

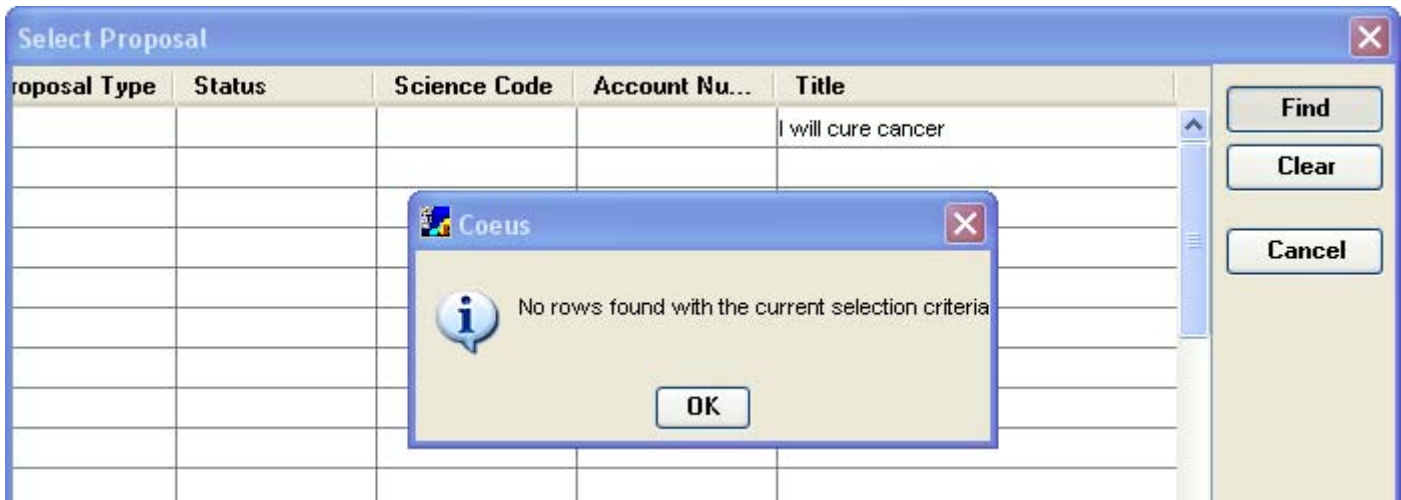
Prime Sponsor: 300865 NATL INST OF HEALTH

You will learn more about viewing the Institute Proposal information later in this guide. For now, close the Institute Proposal search results window by clicking on the **X** at the top-right of the proposal's window (NOT the X at the top-right of the Coeus window!). You should now see the search results again. If your first search didn't turn up the proposal you were looking for, you can open the search window again by clicking on the **magnifying glass** button:

Institutional Proposal List Search for Proposal

Proposal No.	Type	Activity	Status	Lead Unit	Lead Unit Name	Account No.	Title
10031200	Resubmission	Organized Research	Pending	17053113	PEDIATRIC GASTROENTERO...		Pathogenesis of Rhett Syndrome
08041352	Renewal	Organized Research	Not Funded	17053113	PEDIATRIC GASTROENTERO...	0001767	Pathogenesis of Rhett Syndrome
09031206	Resubmission	Organized Research	Pending	17053113	PEDIATRIC GASTROENTERO...		Pathogenesis of Rhett Syndrome
98030713	New	Organized Research	Funded	17033000	PATHOLOGY		Pathogenesis Of Rhett Syndrome

If your search did not turn up any results, you will select the **OK** button to modify your search criteria:

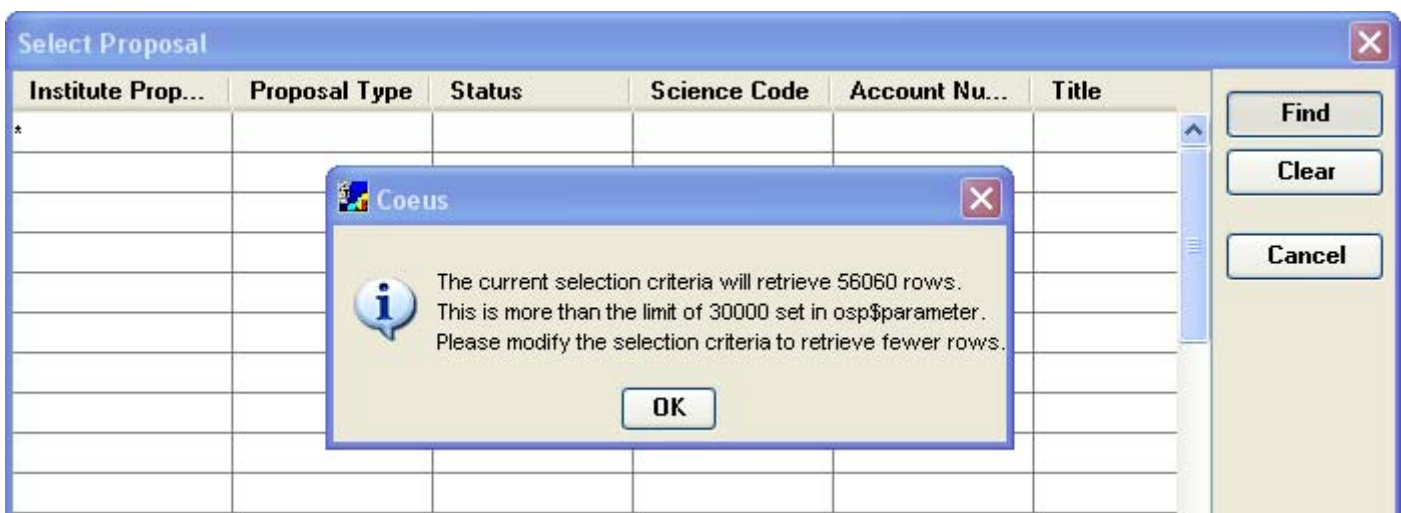


A common mistake is for users to assume all of the search fields are empty when in fact there is text in one of the fields not in view (you need to scroll right to see it). This will cause your search to be inaccurate.

For an exact match search to be successful, the information must be typed exactly. Since it is possible that you will not know the exact title of the proposal, or that you may type it wrong, it's usually best to conduct a wildcard search.

Wildcard Searching

Use the asterisk * to tell Coeus that you will be performing a wildcard search. A wildcard tells Coeus "anything could go here". An asterisk at the end tells Coeus to return all records that begin with whatever you type. An asterisk at the beginning tells Coeus to return all records that end with whatever typed. An asterisk on both sides tells Coeus to return all records that contains whatever you type. Most users prefer to use the "contains" wildcard search to increase the likelihood that all desired records will be retrieved. An asterisk by itself tells Coeus to return all records for that field. There are some searches where the use of the asterisk alone would adversely affect system performance. The system will alert you to modify your search criteria to retrieve fewer results:



To demonstrate use of the wildcard search, in the field for **Project Title**, you can use the wild card as follows:

Novel* will return all institute proposal records where the project title begins with the word Novel.

***Novel** will return all Institute Proposal records where the project title ends with the word Novel.

Novel will return all Institute Proposal records where the project title contains the word Novel.

And/Or Searching

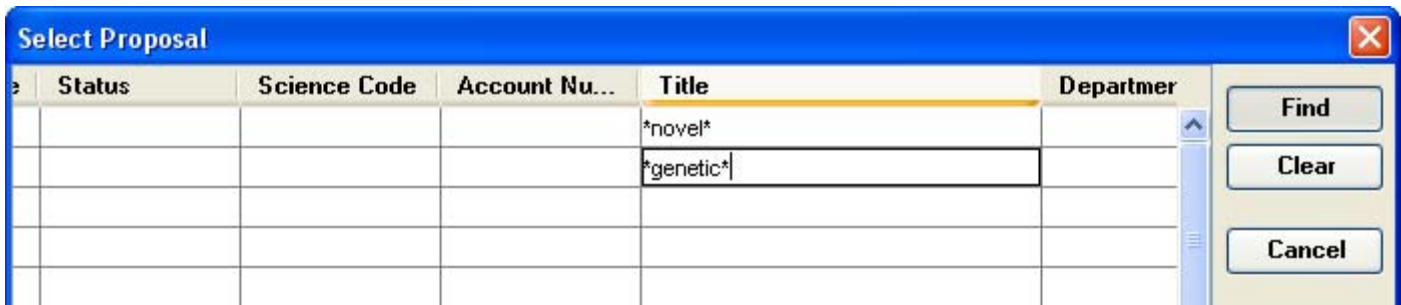
Coeus can be searched using multiple criteria. For example, to find Institute Proposals that contain the word "Novel" in the title AND that are pending, enter the **Title** search as before, then choose the **Pending** option from the **Status** column (when you click on the Status field, a drop-down list will automatically appear). Make sure you do this in the same row as the Title search.

Type	Status	Science Code	Account Nu...	Title	Depa
	Pending			*Novel*	

Results:

Proposal ...	Type	Activity	Status	Lead Unit	Lead Unit Name	Account No.	Title
10031454	New	Organized Research	Pending	17049111	NEUROMUSCULAR		A Novel CNS-Penetrable Antiretroviral
10031449	New	Clinical Trial	Pending	17057513	PSYCH BEHAV PHARMACO...		Exendin-4, a novel approach for the treatment
10031423	New	Organized Research	Pending	17053118	PEDIATRIC INFECTIOUS DISE...		Inhibition of Cytomegalovirus Replication by N
10031294	New	Instruction	Pending	17051113	MEDICAL ONCOLOGY		Administration of a novel PDE5 inhibitor, SLX-
10031286	New	Instruction	Pending	17051113	MEDICAL ONCOLOGY		Evaluation of cardiac glycoside, digoxin, as a
10031187	New	Organized Research	Pending	17051119	UPPER AERODIGESTIVE		CD56-targeted nanoparticles as a novel ther
10031186	New	Organized Research	Pending	17051119	UPPER AERODIGESTIVE		Damon Runyon-Radchleff Innovation Award
10031175	New	Clinical Trial	Pending	17049125	NEUROLOGY ICF		Evaluation of Blood Rinspectronov as a Nov

Coeus can also be searched using either/or logic. For example to find proposals that contain the word "Novel" in the title OR the word "Genetic" in the title, enter the **Title** search as before, then enter another **Title** search in the next row.



Results:

Proposal No.	Type	Activity	Status	Lead Unit	Lead Unit Name	Account No.	Title
00051371	New	Instruction	Not Funded	17066000	OPHTHALMOLOGY		Genetic Linkage Mapping Of Genes Involved
00071709	New	Organized Research	Not Funded	17051111	HEMATOLOGIC MALIGNANC...		A Novel Pharmacologic Approach To The Tre
03040945	New	Organized Research	Funded	17051123	CANCER IMMUNOLOGY		Development Of A Novel Antigen-Specific Imr
05051761	Renewal	Organized Research	Withdrawn	17066000	OPHTHALMOLOGY		Genetic Basis Of Nanophthalmos
05093170	Resubmission	Organized Research	Funded	17051113	MEDICAL ONCOLOGY		Genetic Effectors Of Tgf-Beta Induced Grow
05124291	New	Organized Research	Not Funded	17019110	PHYSIOLOGY PROGRAMS		Genetic Basis For Congenital Heart Defects
05124384	New	Organized Research	Funded	16020000	ENVIRONMENTAL HEALTH ...		Genetic Susceptibility To Mercury-Induced Im
05124723	New	Organized Research	Not Funded	11541000	BIOLOGY		Genetic Analysis Of Transcription
07041210	New	Organized Research	Not Funded	17072000	SURGERY		Genetic And Epigenetic Analysis Of Thyroid C
07051952	New	Organized Research	Not Funded	17033000	PATHOLOGY		B7-H1 Blockade: A Novel Pancreatic Cancer

To summarize "and/or" searching:

"And" searching occurs when you put more than one search criterion on the same row and will only return results that have both criteria.

"Or" searching occurs when you put search criteria on more than one row and will return results that have either criterion.

Searching for a Range

Say you wanted to search for the Funded ARRA proposals submitted in FY09 for Investigators in the Department of Medicine.

The criteria you would enter on the first row

Institute Proposal - 09*, Status - Funded, Science Code - ARRA, Department Number - <= 17046000, and on the second row, Department number - and >=17046999 (assumes you know that the Unit numbers for the Department of Medicine are consecutive numbers between 17046000 and 17046999). This is how you enter the search criteria:



Read the criteria as “FY09 Institute Proposals that are Funded, flagged with the ARRA science code for Department numbers that are greater than or equal to 17046000 and that are also less than or equal to 17046999.” When you do this type of search it is very important to insert the word “and” in the second row. Without it, Coeus would return all unit numbers. (Without the “and” you would read the search criteria as “Department numbers that are greater than or equal to 17046000 or Department numbers that are less than or equal to 17046999” – this logic includes all department numbers.)

Search Results

Proposal No.	Type	Activity	Status	Lead Unit	Lead Unit Name	Account No.	Title
09105467	Revision	Organized Research	Funded	17046119	GASTROENTEROLOGY		Matriysin regulation in colonic epithelial cells
09010142	Resubmission	Organized Research	Funded	17046119	GASTROENTEROLOGY		Shiga toxin uptake mechanisms and intracellu
09051962	Resubmission	Organized Research	Funded	17066118	OPHTHALMOLOGY GLAUC...	0002318	Pathogenesis of Glaucomatous Optic Nerve E
09117630	Revision	Organized Research	Funded	17046528	RHEUMATOLOGY	0030292	Apoptosis in Sjogren's Syndrome
09127643	Revision	Instruction	Funded	17046528	RHEUMATOLOGY	0033719	T cell response in scleroderma lung disease:
09116480	New	Other Sponsored Acti...	Funded	17046528	RHEUMATOLOGY		Defining mechanisms of distinct tissue damag
09105243	New	Organized Research	Funded	17046117	CARDIOLOGY		Novel Biomarkers in Aortic Aneurysms and A
09105434	Revision	Organized Research	Funded	17046119	GASTROENTEROLOGY	0020854	Diarrheal Diseases: a Physiologic Approach t
09104765	Revision	Organized Research	Funded	17046527	PULMONARY	0028610	Molecular Determinants of Pulmonary Arterial
09105300	New	Organized Research	Funded	17046527	PULMONARY		Mechanisms Linking Sleep-Disordered Breath
09105451	Revision	Organized Research	Funded	17046119	GASTROENTEROLOGY	0000205	NHE3 Regulation and Signaling Complexes
09105436	Revision	Organized Research	Funded	17046119	GASTROENTEROLOGY	0049600	Hopkins Digestive Diseases Basic Research
09041627	New	Organized Research	Funded	17046528	RHEUMATOLOGY		Innate immune lymphocytes and the gut epith
09104837	Revision	Organized Research	Funded	17046127	PULMONARY	0033423	Patient Outcomes 6 and 12 Months after ALT
09107620	Revision	Organized Research	Funded	17046117	CARDIOLOGY	0020395	Hemodynamic Modulation of Thromboresistar
09104761	Revision	Organized Research	Funded	17046127	PULMONARY	0030890	The Role of Hepatocyte Growth Factor Signa
09010271	Resubmission	Organized Research	Funded	17046527	PULMONARY	0000678	Chronic Hypoxia and Pulmonary Vascular Str
09127672	Resubmission	Organized Research	Funded	17046517	CARDIOLOGY		Two Diets with Exercise in Abdominal Obesit
09104778	Revision	Organized Research	Funded	17046117	CARDIOLOGY	0000000	Role of Phosphatase Pten in Ischemic Precon
09104916	Revision	Organized Research	Funded	17046125	INFECTIOUS DISEASES		Latent Viral Reservoirs in HIV 1 Infection
09116470	Revision	Organized Research	Funded	17046125	INFECTIOUS DISEASES	0032815	Center for Point-of-Care Technologies Resea
09104799	Revision	Organized Research	Funded	17046515	CLINICAL IMMUNOLOGY	0029590	Activation of Nociceptors in Esophagus
09126927	Revision	Organized Research	Funded	17046515	CLINICAL IMMUNOLOGY	0026229	Efficacy of IgE in Mediating Allergic Reactio
09105334	New	Organized Research	Funded	17046117	CARDIOLOGY		Biomarkers of Sudden Death and Progressiv
09105466	Revision	Organized Research	Funded	17046119	GASTROENTEROLOGY		Transporterand Trafficking in Polarized Epithe
09051927	Resubmission	Organized Research	Funded	17046119	GASTROENTEROLOGY		The Role of microRNA Alterations in Barrett's
09010413	Resubmission	Organized Research	Funded	17046112	GENERAL INTERNAL MEDI...		Genetic Determinants of Premature Vascular

Field Definitions for Institute Proposals

In the Institute Proposal module there are several panels that display various fields that contain information about a given proposal. The screens are designated by the tabs that are located on the top of the Institute Proposal window. The source of the information in the Institute Proposal fields is the eIS or the Proposal Development Record. The following section will define the fields that are within each tab:

Proposal Tab - This tab contains general information about the Proposal. Within this tab you will find the following fields:

The screenshot shows the 'Display Institute Proposal 10031139 Sequence 1' window in the Coeus system. The 'Proposal' tab is active, and a red arrow points to the 'Proposal No.' field. The form contains the following fields and values:

- Proposal No.: 10031139
- Seq No.: 1
- Award Number: (empty)
- Status: Pending
- Title: Modulation of pathological angiogenesis by miRNAs
- Proposal Type: New
- Account: (empty)
- NSF Code: (empty)
- Anticipated Award Type: (empty)
- Sponsor: 300057 AM ASSN FOR CANCER RESEARCH
- Prime Sponsor: (empty)
- Request Start Date: 01-Dec-2009
- Request End Date: 30-Nov-2010
- Total Direct Cost: \$50,000.00
- Total Indirect Cost: \$0.00
- Total All Cost: \$50,000.00
- Initial Period: 01-Dec-2009
- Total Period: 30-Nov-2011
- Grad Students: Headcount: 0, Person Months: .00
- Account Type: Research (selected), Fund (unselected)
- Subcontract: (unchecked)
- Prop Create Date: 02-Sep-2009
- Initial Contract Admin: (empty)
- Opportunity Id: (empty), CFDA No.: (empty)
- Summary/Comments: PI HAS COMPLETED COMPLIANCE TRAINING.
- Last Update: 02-Sep-2009 02:26 PM
- Update User: Averella, Ashley G

1. **Proposal No.** – The unique identifying number of a proposal; assigned by Coeus. The Institute Proposal number has the following site logic FYFMXXXX, where the first two digits represents the Fiscal Year, the second two digits represents the Fiscal Month, and the last four digits are sequentially assigned. Example: 09101234 indicates the proposal was submitted in April 2009, where April is the 10th fiscal month in Fiscal Year 2009.
2. **Seq. No.** – Coeus generates a sequence number when a new proposal is created or a new entry is made to an existing proposal. The Sequence number will default to 1 when a proposal is first created.
3. **Award Number** – This is the Coeus Award number created by the SAP GM award interface. The Award Number field connects a proposal to an existing award.

4. Status – Current status of the proposal. The following are the status options that can be selected: Pending, Funded, Not Funded, Withdrawn and Void. When a new institute proposal record is created, the Status will default to Pending. Research Administration is responsible for maintaining this field on the Institute Proposal record. It is very important that you notify Research Administration if you know a proposal will not be funded or has been officially withdrawn. The system will automatically change the status to Not Funded for records where the Proposed Start date is 366 days ago. This data element is used to calculate Success Rates. Records with the status of VOID are routinely deleted from the database. VOID is used by Research Administration to indicate the record was created in error and should not be reflected in any official University reporting.
5. Title – The title of the proposed project. The Title field is populated from the Proposal Log selected.
6. Proposal Type – The nature of the funding request. This field defaults from either the proposal development record or the eIS record. The following are the Proposal Type Definitions:
 - New – An application that is being submitted to a sponsor for the first time.
 - Renewal - Proposal that requests an additional award that will continue funding a previously awarded study and has either an announced open competition for the existing award or is not open to competition but also is not guaranteed to be funded. A renewal application competes with all other applications and must be developed as fully as though the applicant is applying for the first time. Proposals of this type will receive a new SAP Grant record created.
 - Continuation - A progress report that must be submitted to receive an increment of funding from a previously awarded amount. This proposal type allows departments to workflow business documents and address research compliance areas. This proposal type will not create an Institute Proposal record and will be excluded from Institutional Success Rate calculations.
 - Revision - An application that proposes a change in the sponsor’s financial obligations or contingent liability from an existing obligation. / Request for additional funds for a current award to expand the scope of work. Applicants should contact the awarding agency for advice on submitting any revision / supplement application
 - Resubmission - Revision of a previously submitted and possibly still “PENDING” proposal. Think 2nd or 3rd attempted at getting a project funded. These 2nd or 3rd attempts should always create a new Institute Proposal number. This proposal type should also be used to process “administrative revisions”, where the sponsor requests a change in proposed scope/budget. If used in this scenario, Research Admin will “sequence” the original Institute Proposal record instead of creating a new record.
 - Task Order - A proposal requesting funds for work or services to be conducted under an existing Master Agreement (a Master Agreement is a type of contract for services that does not procure or specify a firm quantity of services except through the issuance of individual Task Orders)
 - No Cost Extension - This proposal type allows department end users to workflow necessary business documents and address research compliance areas (protocols, COI, etc).
 - Pre-Application - An application that applies only to preliminary proposals (white-paper) that require submission through OSP. Some NIH/NSF program solicitations require or request submission of a preliminary proposal in advance of submission of a full proposal. NIH must go through G.G with the submission status of Preapplication; NSF Pre-Proposals must go through FASTLANE and NSF will determine who will be invited to submit full proposals.

- Negotiation only - This proposal type allows department end users to workflow necessary business documents and address research compliance areas (protocols, COI, etc) for proposals that do not include dollar amounts (MTA agreements, Non-disclosure agreements, confidentiality agreements, MoU, LOI, etc). Once the Institute Proposal number is created, the Research Administration office can use the Coeus negotiation module to track negotiation activities related to the agreement. Institute Proposal records with this type will be excluded from Institutional Success Rate calculations.
 - Internal Application - A proposal for funding by JHU (e.g. SoM: Clinician Scientist Awards) or a proposal for interdivisional coordinated programs requiring JHU internal peer review (e.g. NIEHS Superfund Basic Research and Training Program). Proposals of this type will not create an Institute Proposal number and will be excluded from Institutional Success Rate calculations.
7. Sponsor Prpsl No. – ID Number assigned by a Sponsor to the Proposal after it has been submitted to them.
 8. Account – The last 7 digits of the SAP GM Sponsored Program (also known as the SAP Internal Order) assigned by Sponsored Projects Shared Services to the SAP Grant linked to that proposal.
 9. Activity Type – Categorizes the type of activity for which support is being requested. The following are the Activity Types that can be selected: Organized Research, Instruction, Other Sponsored Activity, and Clinical Trial.
 10. NSF Code – The NSF designated field that defines the body of work. Johns Hopkins does not use this field and therefore the data is not maintained.
 11. Notice of Opportunity – Identifies the request (i.e.RFP) the proposal was submitted in response to. If proposal was not in response to a specific RFP select Unsolicited.
 12. Sponsor - The external funding agency to whom proposal was submitted. If proposal is funded the sponsor enters into an agreement with the University to support research, instruction, or other sponsored activities. Sponsors include federal, state, and local governments, private businesses, corporations, foundations, not-for-profit organizations, universities and foreign entities.
 13. Prime Sponsor – The agency that is the source of funds to the University’s sponsor. For example, the University of Maryland (UMD) receives an award from the National Institutes of Health (NIH) and subcontracts a piece of work to JHU. JHU’s sponsor is UMD and our prime sponsor is NIH.
 14. Request Start Date Initial Period – The date project/program is anticipated to begin; i.e. estimated start date.
Total Period – The date project/program is anticipated to begin; i.e. estimated start date.
 15. Request End Date Initial Period – The date the first project/program is anticipated to end; i.e. project end date.
Total Period – The date the last project/program is anticipated to end; i.e. project end date.
 16. Total Direct Cost Initial Period – The dollar amount requested for direct costs for the first obligation period.
 17. Total Period – The dollar amount requested for direct costs for all obligation periods.
 18. Total Indirect Cost Initial Period – The dollar amount requested for indirect costs (F&A) for the first obligation period.
 19. Total Period – The dollar amount requested for indirect costs (F&A) for all obligation periods.
 20. Total All Cost Initial Period – The sum of the dollar amounts requested for direct and indirect costs for the first obligation period.

21. Total Period – The sum of the dollar amounts requested for direct and indirect costs for all obligation periods.
22. Headcount (Grad Students) - Currently Not Used.
23. Person Months (Grad Students) - Currently Not Used.
24. Account Type - Identifies the general ledger account type associated with the proposal. The University is only tracking sponsored programs in Coeus; therefore, the research button is selected in all cases.
25. Subcontract – The Subcontract checkbox indicates that a portion of the work is expected to be completed by another organization; i.e. a subaward will be issued.
26. Prop Create Date – The Proposal Create Date is generated by Coeus when the proposal record is initially saved.
27. Initial Contract Admin - Currently Not Used.
28. Last Update – The last date the record was modified. Generated by Coeus when the record is updated and saved.
29. Update User – The username of the last person that modified the record. Generated by Coeus when the record is saved.
30. Summary / Comments – Additional notes/comments about the proposal.

Mailing Info Tab – This tab contains information about how the proposal was sent. The Account field is not used.

The screenshot shows a web-based application window titled "Coeus - Timothy N Schleicher - Coeus Production". The main content area is titled "Display Institute Proposal 10031443 Sequence 1". A red box highlights the "Mailing Info" tab, with a red arrow pointing to it. The form contains several sections:

- Deadline:** Date: 29-Sep-2009; Type: Postmark, Receipt
- Mail By:** OSP, Department
- Type:** Regular, DHL, Electronic
- Account:** [Empty text box]
- No Of Copies:** [Empty text box]
- Address:** [Empty text box]
- Comments:** [Empty text box]

Deadline Date – Represents the sponsor’s deadline date.

Deadline Type – Identifies where the deadline is by postmark or by receipt.

Mail By – Identifies where the Research Administration office or the Department is responsible for mailing the proposal.

Type – Identifies the method of proposal submission (DHL will be changed to Express Courier).

No of Copies – Used to indicate the number of copies of the proposal the sponsor requires.

Account – Not Used.

Address – Used to indicate the mail-to address, which may be different from the sponsor’s corporate address. This uses the Coeus Rolodex, so you may to create a rolodex entry (Coeus User Role – Rolodex Maintainer is required in order to create rolodex entries).

Comments – Used to store notes/comments regarding the proposal submission.

Investigators Tab – This tab contains information about the Principal Investigator, Multi-Principal Investigators, Co-Investigators, and Units involved/associated with the Proposal. The % Effort field is populated from either the proposal development record or the eIS. The pointing finger in the top section indicates which row is selected. Departmental information about the investigator in that row is displayed in the section below. Clicking on a different investigator will display corresponding information below.

The screenshot shows the Coeus software interface. The main window title is "Coeus - Timothy N Schleicher - Coeus Production". The menu bar includes "File", "Details", "Maintain", "Departmental", "Admin", "Central Admin", "Window", and "Help". The toolbar contains various icons for file operations and navigation. The main window title is "Display Institute Proposal 10031401 Sequence 1". The menu bar includes "Proposal", "Mailing Info", "Investigators", "Co-Investigation", "IDC Rate", "Special Review", "Science Codes", "IP Review", and "Others". The "Investigators" tab is selected, indicated by a red arrow. The main data table has the following columns: "Person Name", "PI", "Multi PI", "Faculty", "Effort %", "Academic Year Effort", "Summer Year Effort", and "Calendar Year Effort". The table contains three rows of data:

Person Name	PI	Multi PI	Faculty	Effort %	Academic Year Effort	Summer Year Effort	Calendar Year Effort
Bishai, William R	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20.00	.00	.00	2.40
Lee, Jonghee	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100.00	.00	.00	12.00
Nedeltshev, Gueno	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25.00	.00	.00	3.00

Below the table is a section for "Lead" and "Number" with a table showing "17046125" and "INFECTIOUS DISEASES". The "Osp Administrator" is listed as "Choi, Terry". The "Proposal Administrator" section indicates "There are no Administrators for this proposal." The right side of the interface contains several buttons: "Add", "Delete", "Find Person", "Rolodex", "Credit Split", "Add Unit", "Del Unit", "Find Unit", and "Administrators".

Person Name – The name(s) of the Investigator(s) as listed on the proposal development record or the eIS.

PI – The Principal Investigator check box indicates whether or not this person is considered the primary or lead Principal Investigator for the proposed project.

Multi PI – The Multi-PI check box indicated whether or not this person is considered a Principal Investigator. Note – the individual with both the PI and Multi-PI check box is the “contact” PI for the sponsoring agency.

Faculty – The Faculty check box indicates that the selected person is a faculty member. This information defaults from the person table.

% Effort – The percentage of the total effort of that individual, devoted to the proposed project, calculated on an annualized basis, as listed on the proposal development record or the eIS.

Academic Year Effort – The percentage of the total effort of that individual in an Academic Year, as listed on the proposal development record.

Summer Year Effort – The percentage of the total effort of that individual in a Summer Year, as listed on the proposal development record.

Calendar Year Effort – The percentage of the total effort of that individual in a Calendar Year, as listed on the proposal development record.

Lead – The Lead checkbox indicates the department/unit with overall administrative responsibility for the proposed project.

Number – The department/unit code for the department(s) specified on the proposal. The Department Number defaults from the person table and is dependent on the Person Name (of PI) highlighted. The Department Number is changed if the Investigators home department is not the proposal submission department.

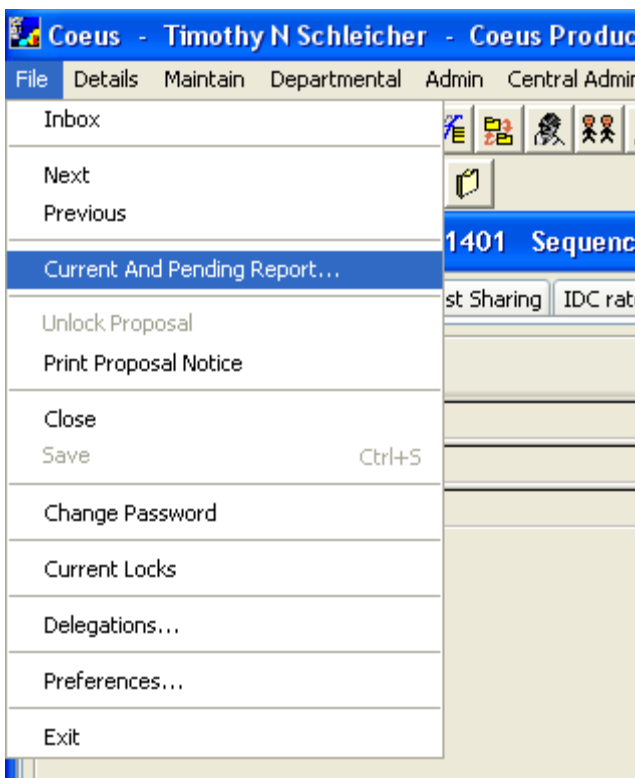
Name – The Department, Lab or Center Name for the department(s) specified on the proposal. The Name is dependent on the department number selected. This information is from the Unit Table and cannot be changed. The Department Name is changed if the Investigators home department is not the proposal submission department.

OSP Administrator – The primary Research Administration contact person for the Unit.

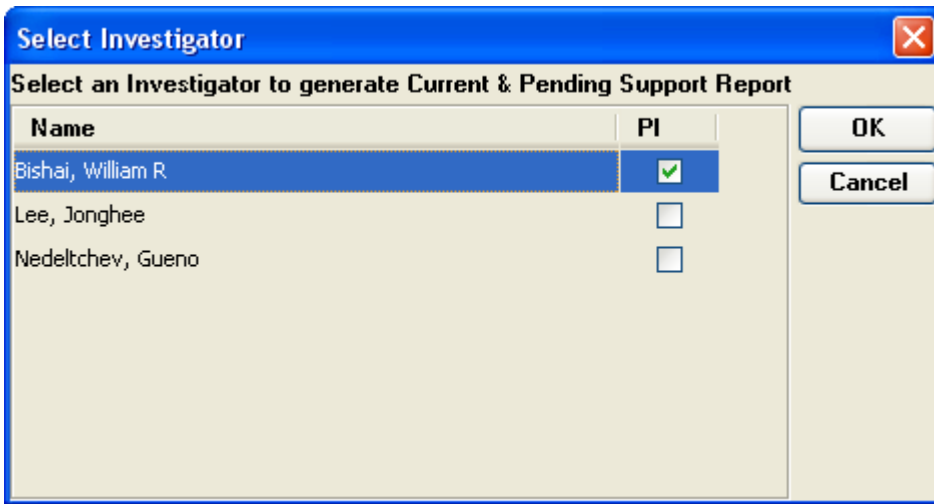
Proposal Administrator – Currently not used

Credit Split button – Not used by Johns Hopkins.

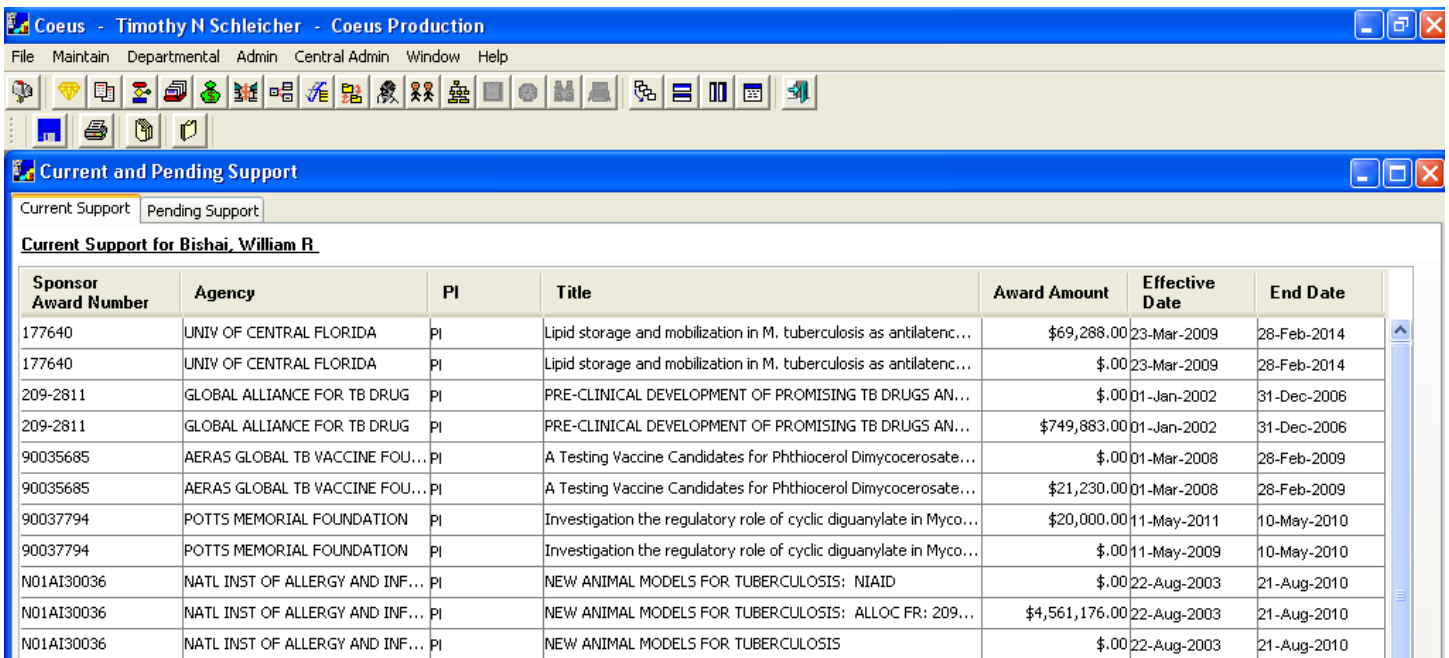
You can view the Investigator’s current and pending report. From the menu select File > Current and Pending Report...



In the dialog box that appears, select an investigator and click the OK button.



A new window will open with a tab for the investigator's current support and a tab for the investigator's pending support.

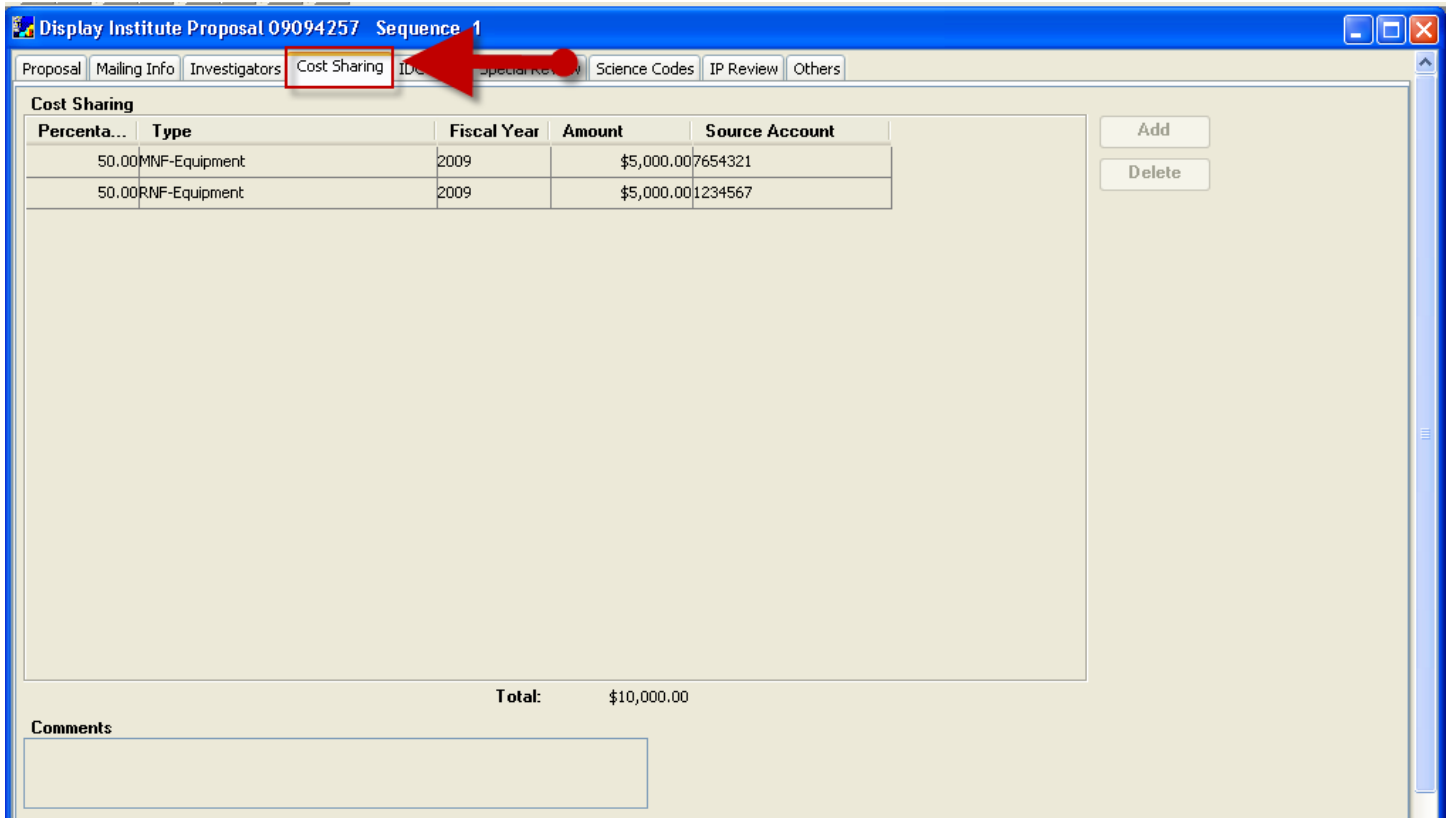


Current Support is based on the status of SAP Grants and Sponsored Programs. If the status in SAP is Awarded Active, the records will appear as Current in Coeus. Please contact Sponsored Projects Shared Services if you believe the status is incorrect.

This view shows all records where the person is flagged as Principal Investigator, Multi-PI, or Co-Investigator.

This data can be exported to Excel for editing and formatting based on sponsor's requirements, or printed to a pdf file.

Cost Sharing Tab – This tab identifies any proposed project costs not borne by the sponsor but borne by the University. There are six general categories (types) of cost sharing that the University tracks.



Cost Sharing Tab – fields

Note - If cost sharing information is completed in the proposal budget development module, it is carried forward to this tab.

Percentage – Use if cost sharing will be split among more than one source account.

Type – The six general categories of cost sharing that the university tracks. The following is a list of the Cost Sharing types: Equipment, Equipment funded by VPR, F & A (Indirect Costs), F & A (Indirect Costs) funded by VPR, Other Direct Costs, and Salary & Fringe- Key Personnel.

Fiscal Year – The estimated fiscal year for each cost sharing commitment type.

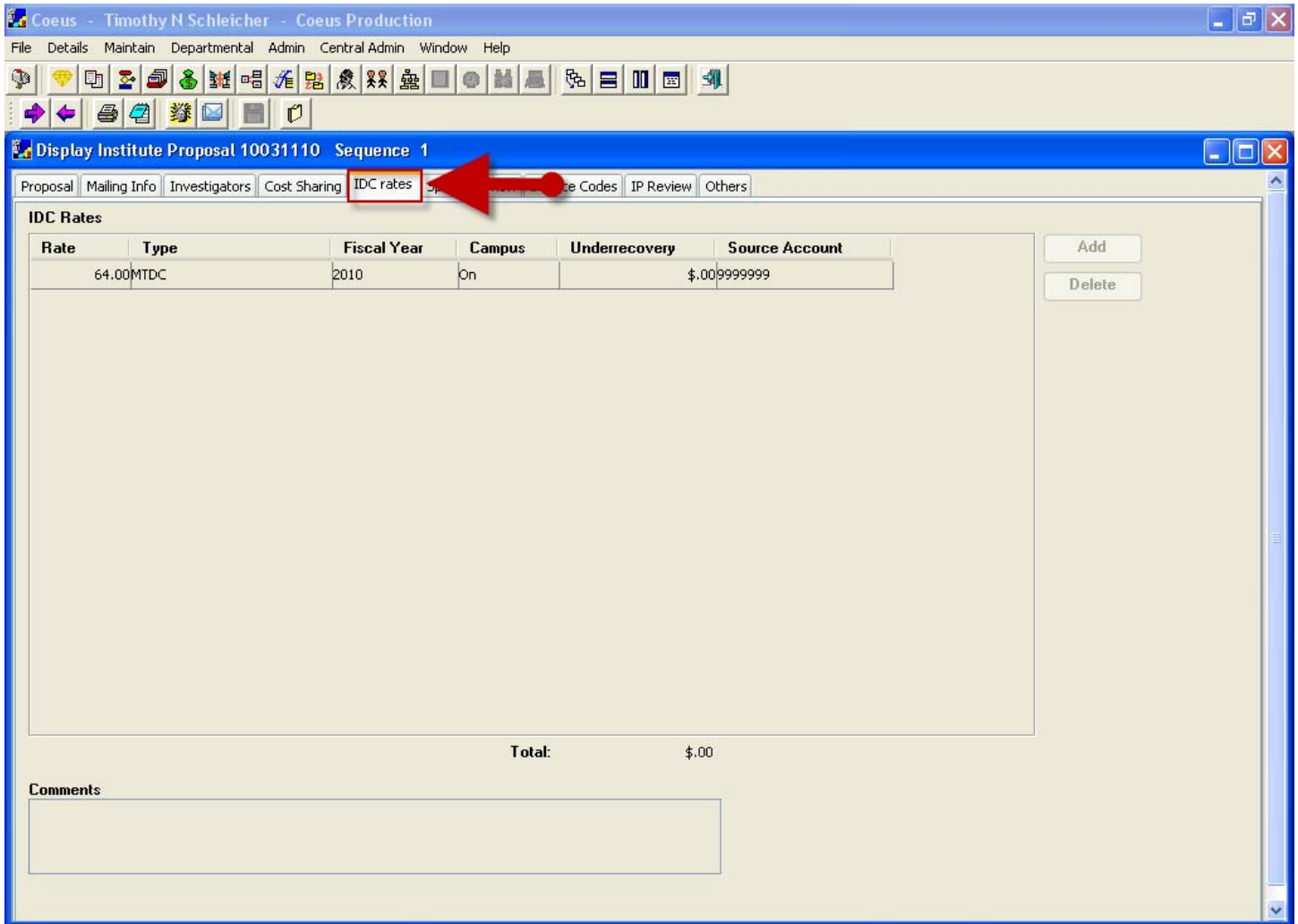
Amount – The dollar value of each type of Cost Sharing for a particular fiscal year.

Source Account – The SAP cost center or internal order number(s) that identify where the cost sharing commitment are from; gift, endowment, and other non-sponsored accounts.

Comments – Comments or notes about the Cost Sharing.

PLEASE CONTACT YOUR RESEARCH ADMINISTRATION OFFICE WITH QUESTIONS RELATED TO COST SHARING POLICY.

IDC Rates Tab – This tab contains information about the F&A / Indirect Cost Rate(s) (IDC) associated with the proposal. The rates are entered for each fiscal year of the proposed project period.



IDC rates Tab - fields

Rate – The IDC rate that will be applied for a particular fiscal year.

Type –

Fiscal Year – The fiscal year for which that IDC Rate applies.

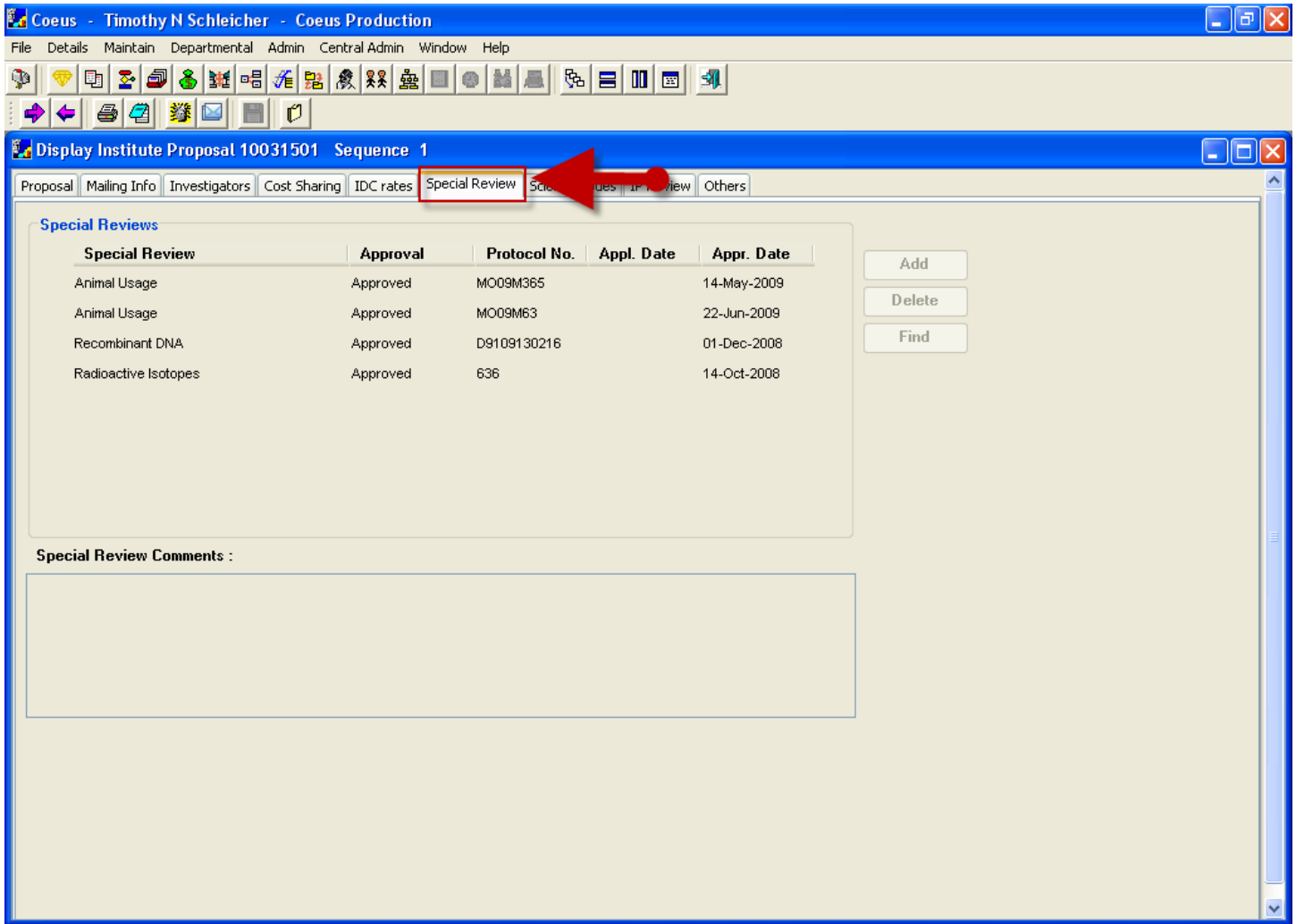
Campus – Indicates where the preponderance of activity will occur i.e. ON – on campus, OFF – off campus.

Under-recovery -

Source Account –

Comments – Comments or notes about the IDC rates.

Special Review Tab – This tab contains information pertaining to the regulatory and institutional issues associated with the proposed project.



Special Review Tab - fields

Special Review – Any special reviews for the proposal are listed here. Examples include: Animal Usage, Human Research Participants, Recombinant DNA, etc, as listed on the proposal development record or the eIS.

Approval – The status of the special review as listed on the proposal development record or the eIS.

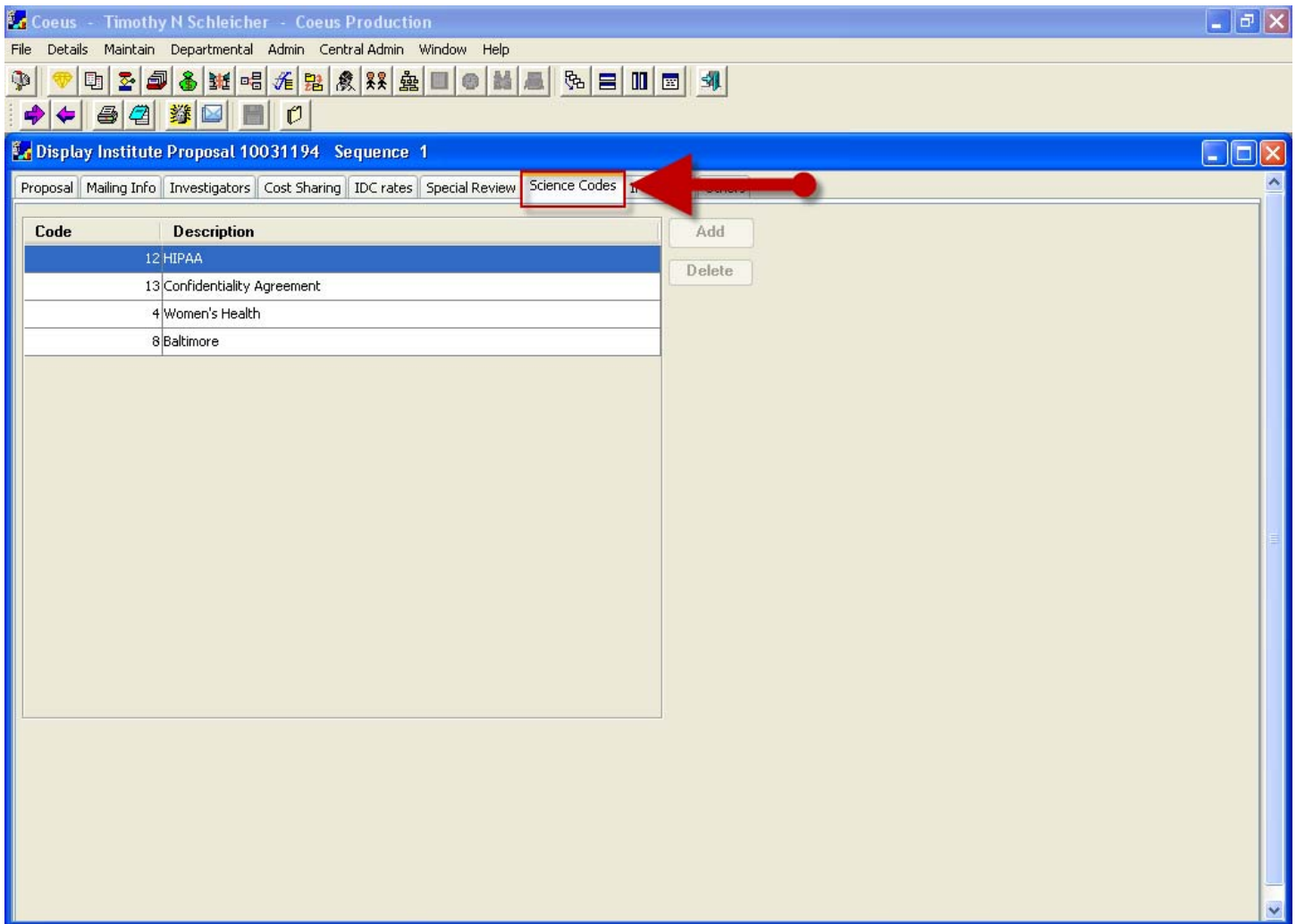
Protocol No. – The protocol/approval number for the special review as listed on the proposal development record or the eIS.

Appl. Date – The application data of the special review as listed on the proposal development record or the eIS.

Appr. Date – The approval date of the special review as listed on the proposal development record or the eIS.

Special Review Comments – Special instructions or other pertinent information regarding Special Reviews for the proposal (also used to track Exemption Code for Human Subject Exempt Protocols) as listed on the proposal development record or the eIS.

Science Code tab – Used to track key words associated with proposals, or targeted populations served by the proposal.



The current Science Code table entries are:

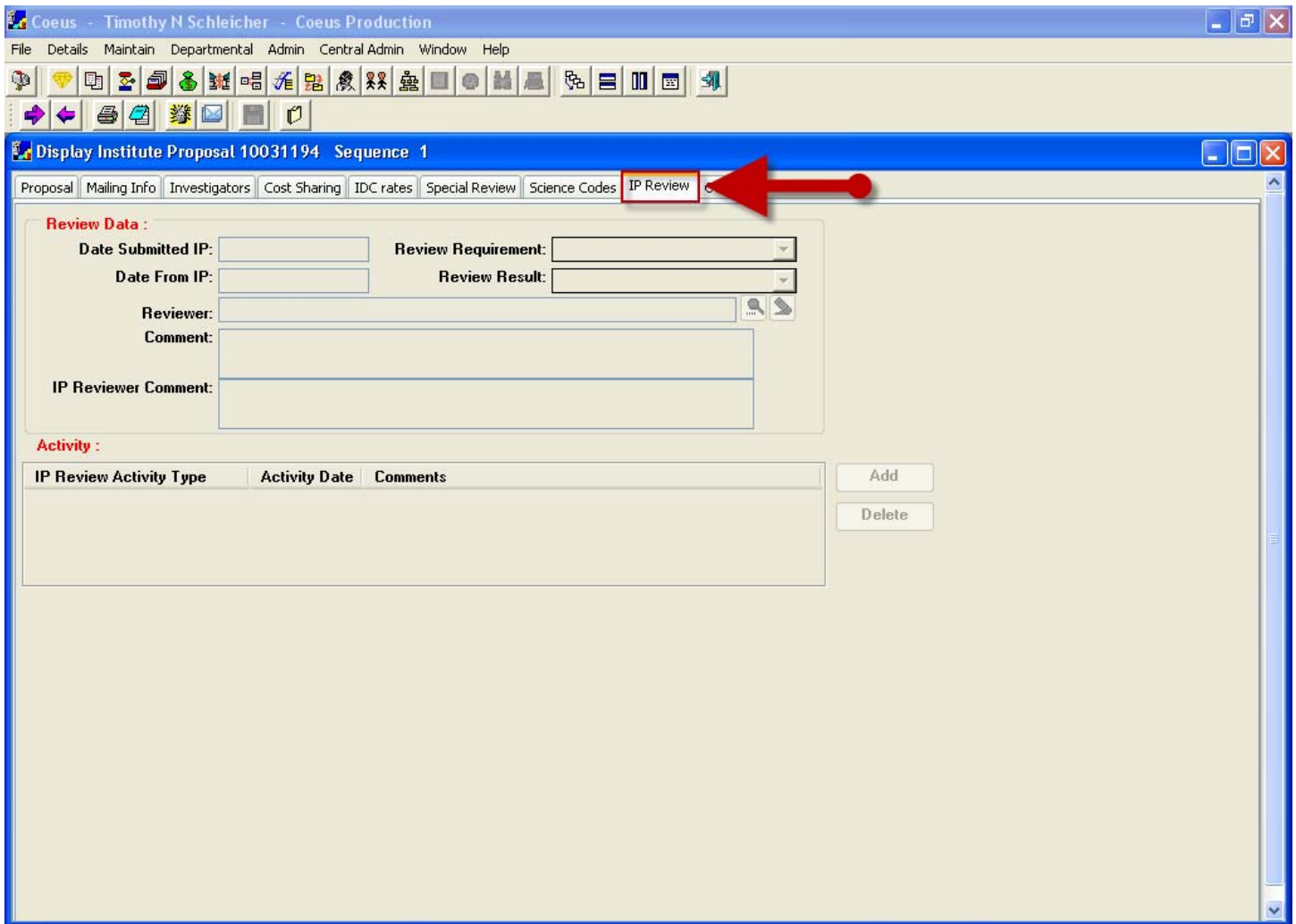
AIDS/HIV	Baltimore
Cancer	Career Award
Vaccine	International Programs
Women's Health	Foundation Relations
Internal Proposal	HIPPA
Hopkins	Confidentiality Agreement
Maryland	ARRA (American Recovery and Reinvestment Act)

These are as listed on the proposal development record or the eIS.

This data is sent to the SAP Business Warehouse and used in reporting.

This can also be used as a Search Criteria for the Institute Proposal module.

IP Review Tab – This tab is used to record and communicate background Intellectual Property reviews that are performed on proposals to industrial/commercial sponsors. This tab is not maintained at JHU however we may build an interface from Tech Transfer to capture some of this data.



IP review tab – Fields:

Date submitted IP - is used to track the date the proposal was sent to for review.

Review Requirement - examples include [Expedited; Other; Special; or Standard] as defined locally and entered in Proposal Code Table.

Date From IP - track the date the review results were returned from review

Review Result - select a result (code table maintained) see example list below:

- A - No Inventions Disclosed to TLO
- B1 - Inventions Disclosed, but not related to the proposals
- B2 - STOP - there is IP disclosed which IS related and it is NOT available for this project
- B2R - IP disclosed, related to this proposal, is available

Reviewer - search and select the name of the IP reviewer (maintained in Person Table).

Comment - text block available for maintainer comment.

IP Reviewer Comment - text block available to insert pertinent IP reviewer comment.

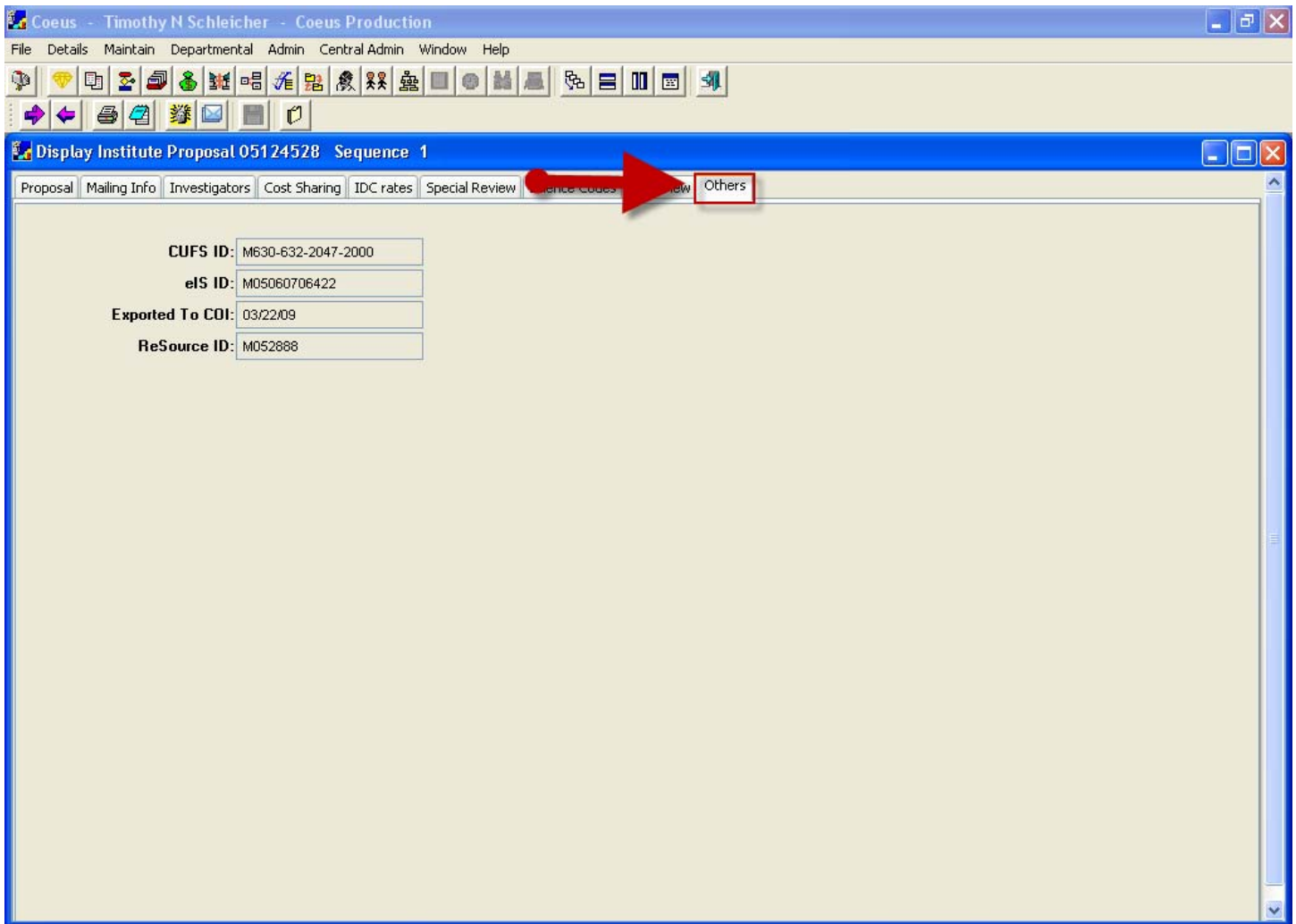
Activity panel-

Select IP Review Activity Type - (code table list) to describe discussions related to review

Activity Date - enter a date for the activity type selected

Comments - maintain comments related to activity.

Others tab – used to track custom fields created by JHU



CUFS ID – Displays the legacy system CUFS account number for converted ReSource records

eIS ID – Displays the eIS record used to create this Institute Proposal record

Exported to COI – Displays the last date data was sent to the Conflict of Interest database.

ReSource ID – Displays the legacy system ReSource ID for converted ReSource records.