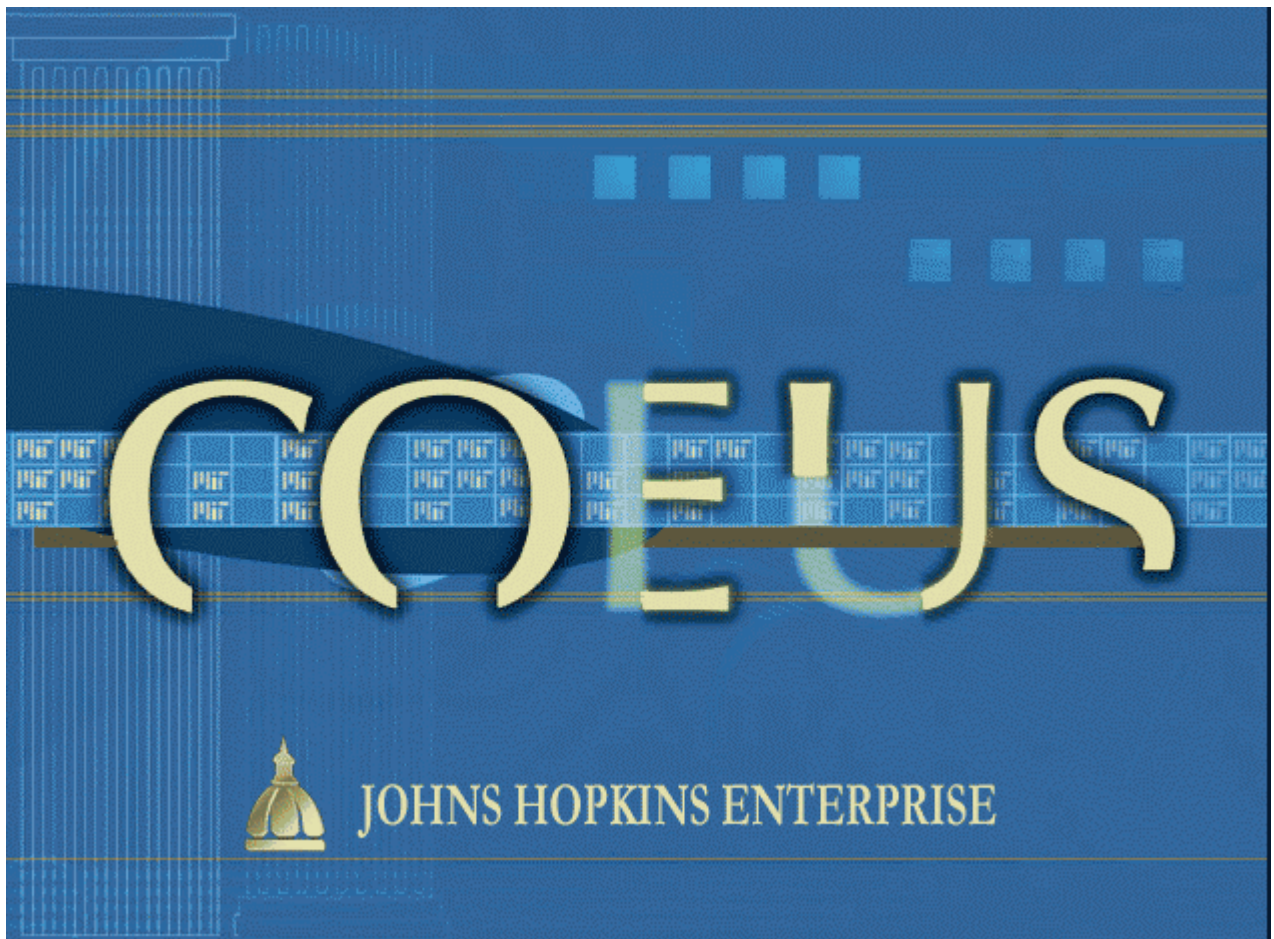


Coeus® Version 4.4.4

DEPARTMENT APPROVERS GUIDE

COEUS LITE



July, 2011

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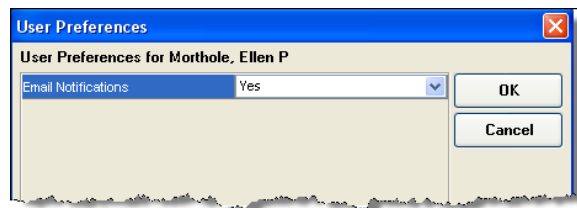
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As an Approver, you will automatically receive a notification when a proposal begins workflow and is awaiting your review and approval/rejection.

## Setting Your Email Preference

By default, when your Coeus user account was created, the email preference was set to “Yes.” This means that any time you receive mail in your Coeus Inbox, the mail will automatically be forwarded to the email address associated with your user account. You have the ability to change this default setting to “No,” however this is NOT recommended.

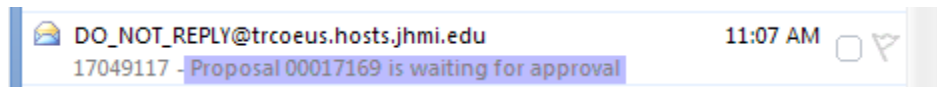
To change the default setting, you must log into Coeus Premium and from the menu select File>Preferences. This will open the user Preferences window where you will be able to change the default setting.



## Email Notifications

Notifications will inform you if you are the primary or alternate Approver for a proposal.

With your email notifications preference set to “Yes,” any time you receive email from Coeus, you will have a link to the proposal development record you must review. Below are examples of email messages for both primary and alternate Approvers:



*This inbox listing opens to a message like one of these:*

Please approve this proposal.

PI: Morthole, Ellen P  
Profit Center: 17049117 : COGNITIVE NEUROLOGY  
Proposal Number: 00017169  
Sponsor: NATL INST OF HEALTH  
Deadline Date: March 15, 2011  
Title: Twice Exceptionality in Elementary School-age Children  
Sponsor Announcement:

You can view this proposal through CoeusLite at the following address: <https://trcoeus.johnshopkins.edu/coeus/displayProposal.do?proposalNo=00017169>

PLEASE NOTE: This email is for notification purposes only. Please do not reply to this email for any purpose.

You are designated as an alternate approver for this proposal.

PI: Morthole, Ellen P  
Profit Center: 17049117 : COGNITIVE NEUROLOGY  
Proposal Number: 00017169  
Sponsor: NATL INST OF HEALTH  
Deadline Date: March 15, 2011  
Title: Twice Exceptionality in Elementary School-age Children  
Sponsor Announcement:

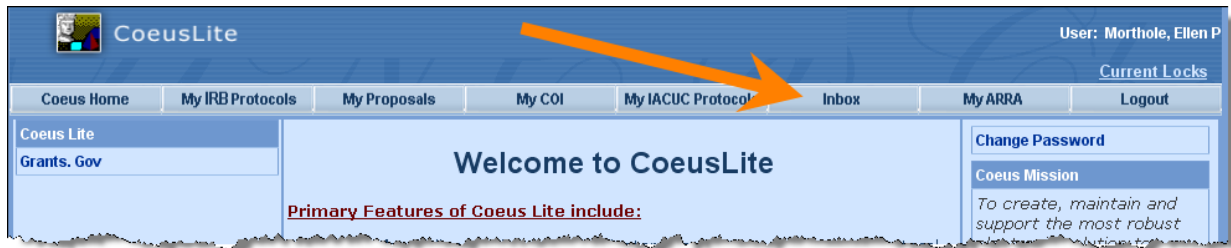
You can view this proposal through CoeusLite at the following address: <https://trcoeus.johnshopkins.edu/coeus/displayProposal.do?proposalNo=00017169>

PLEASE NOTE: This email is for notification purposes only. Please do not reply to this email for any purpose.

Click on the link within the email notification to be presented with the CoeusLite login window. Enter your JHED ID and JHED password; the proposal record will open directly to the Proposal Summary view.

## Locating a Proposal from your CoeusLite Inbox:

Select "Inbox" from the CoeusLite navigation menu:



The default view for your inbox is "Unresolved Messages."

A screenshot of the CoeusLite inbox interface. The navigation menu at the top includes 'Inbox' and 'Unresolved Messages'. Below the navigation, there is a section titled 'Unresolved Messages for Coeus Application' with a 'Move Selected Messages' button. A table lists several messages with color-coded flags: a red flag for urgent messages, a yellow flag for messages due within four days, and a green flag for messages due within ten days. The table columns are: From, Message, Proposal Title, Proposal Number, and Date Received.

<input type="checkbox"/>	From	Message	Proposal Title	Proposal Number	Date Received
<input type="checkbox"/>	Pio Roda, Marissa	You are designated as an alternate approver for this proposal.	<a href="#">Little heartbeats</a>	<a href="#">00017229</a>	02/16/2011 10:36 AM
<input type="checkbox"/>	Morthole, Ellen P	You are designated as an alternate approver for this proposal.	<a href="#">Perfectionism and underachievement in profoundly gifted students</a>	<a href="#">00017228</a>	02/16/2011 10:15 AM
<input type="checkbox"/>	Morthole, Ellen P	You are designated as an alternate approver for this proposal.	<a href="#">Education initiatives to address PG</a>	<a href="#">00017227</a>	02/16/2011 10:10 AM
<input type="checkbox"/>	Morthole, Ellen P	The Proposal has been rejected by Morthole, Ellen P	<a href="#">Twice Exceptionality in Elementary School-age Children</a>	<a href="#">00017226</a>	02/16/2011 07:45 AM

### OVERVIEW OF LITE INBOX ITEMS

Lite Inbox notifications have color coded flags (highlighted) to identify proposals nearing submission deadlines.

- **Red:** These proposals are most urgent; due to the sponsor within two days.
- **Yellow:** Due to the sponsor within four days.
- **Green:** Due to the sponsor within ten days.
- **No Flag:** No deadline date was entered, or the date has passed.

Message Types:

- **Approval:**
  - If you are the primary approver, the message will say, "Please approve this proposal."
  - If you are an alternate approver, the message will say, "You are designated as an alternate approver for this proposal."
- **Notification:** Specific notification information also is provided in the Message script. Types of notifications could include:
  - Bypass: Notification that your approval has been bypassed.
  - Narrative Refresh: Changed status of a narrative in an "Approval in Progress" proposal.
  - Custom Notifications: Notices as determined in customized business rules.

### ACTIONS AVAILABLE ON INBOX SCREEN:

#### *Move Selected Messages:*

Enter a check in the checkboxes of proposals you wish to move to the Resolved Messages Box. Only proposals that have been approved or rejected may be moved.

Navigate to the Proposal Summary:

Click on the Proposal Title or Proposal Number to open the summary and approve/reject functions.

Open Resolved Messages:

Click on the Resolved Messages link just under the menu bar.

Search for a Proposal:

Click on the Proposal Search link just under the menu bar.

## Opening a Record for Review, Approval or Rejection

Unless following the direct link from an email notification, approvers must navigate from the Inbox to the Proposal Summary screen to review, approve or reject a proposal.

Unresolved Messages for Coeus Application

Move Selected Messages

Click on one of the active links to open the Proposal Summary Window.

<input type="checkbox"/>		From	Message	Proposal Title	Proposal Number	Date Received
<input type="checkbox"/>		Pio Roda, Marissa	You are designated as an alternate approver for this proposal.	<a href="#">Little Heartbeats</a>	<a href="#">00020675</a>	07/01/2011 02:56 PM
<input type="checkbox"/>		Atlass, Jessica	You are designated as an alternate approver for this proposal.	<a href="#">Perfectionism and underachievement in profoundly gifted students</a>	<a href="#">00020676</a>	07/01/2011 02:55 PM
<input type="checkbox"/>		Atlass, Jessica	You are designated as an alternate approver for this proposal.	<a href="#">Education Initiatives to address PG in Public School Classrooms</a>	<a href="#">00020677</a>	07/01/2011 02:54 PM

The Summary screen contains an overview of budget and navigation options to help the approver review the proposal.

Coeus Home | My IRB Protocols | My Proposals | My COI | My IACUC Protocols | Inbox | My ARRA | Logout

All Proposals | Proposals In Progress | Create New Proposal | Proposal Search | Grants.gov Opportunity Search

Back to Inbox | Proposal Details | Approval Routing | Approve | Reject

Click on these links to navigate or take actions from this window.

Review answers to questionnaires here.

Click on these links to open a pdf view of these reports.

**Proposal Summary** Hide

Investigator: Morthole, Ellen P      Proposal #: 00020679 (Approval In Progress)  
 Agency/Sponsor: 300865 : NATL INST OF HEALTH      Proposal Period: 09/01/2011 - 08/31/2016  
 Title: Perfectionism and underachievement in profoundly gifted stude...

Budget Total

Direct Cost	\$5,391,608.91	Indirect Cost	\$3,327,297.52	Total Cost	\$8,718,906.43
Under Recovery	\$0.00	Cost Share	\$0.00	Period	09/01/2011 - 08/31/2016

Budget Summary Hide

Budget Period Hide

Period	Start Date	End Date	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	09/01/2011-	08/31/2012	\$1,016,000.00	\$626,820.00	\$0.00	\$0.00	\$1,642,820.00
2	09/01/2012-	08/31/2013	\$1,046,240.00	\$645,568.80	\$0.00	\$0.00	\$1,691,808.80
3	09/01/2013-	08/31/2014	\$1,077,387.20	\$664,880.06	\$0.00	\$0.00	\$1,742,267.26
4	09/01/2014-	08/31/2015	\$1,109,468.82	\$684,770.67	\$0.00	\$0.00	\$1,794,239.49
5	09/01/2015-	08/31/2016	\$1,142,512.89	\$705,257.99	\$0.00	\$0.00	\$1,847,770.88

Budget Report Hide

[Budget Summary by Period](#)  
[Cost Sharing Summary by Period](#)  
[Cumulative Budget](#)  
[Industrial Budget by Period](#)

Attachments Hide

Type	Description	View
PHS_ResearchPlan_SpecificAims	Complete	<a href="#">View</a>
PHS_ResearchPlan_InclusionOfWomenAndMinorities	Complete	<a href="#">View</a>
Investigator Certifications	Complete	<a href="#">View</a>
PHS_Career_InclusionOfChildren	Complete	<a href="#">View</a>

List of Investigators/Key Study Personnel Hide

Name	Department	LU	MPI	Role	Certify
Morthole, Ellen P	• COGNITIVE NEUROLOGY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Principal Investigator	<a href="#">Certify</a>

Questionnaire Hide

Research Compliance Questions Hide

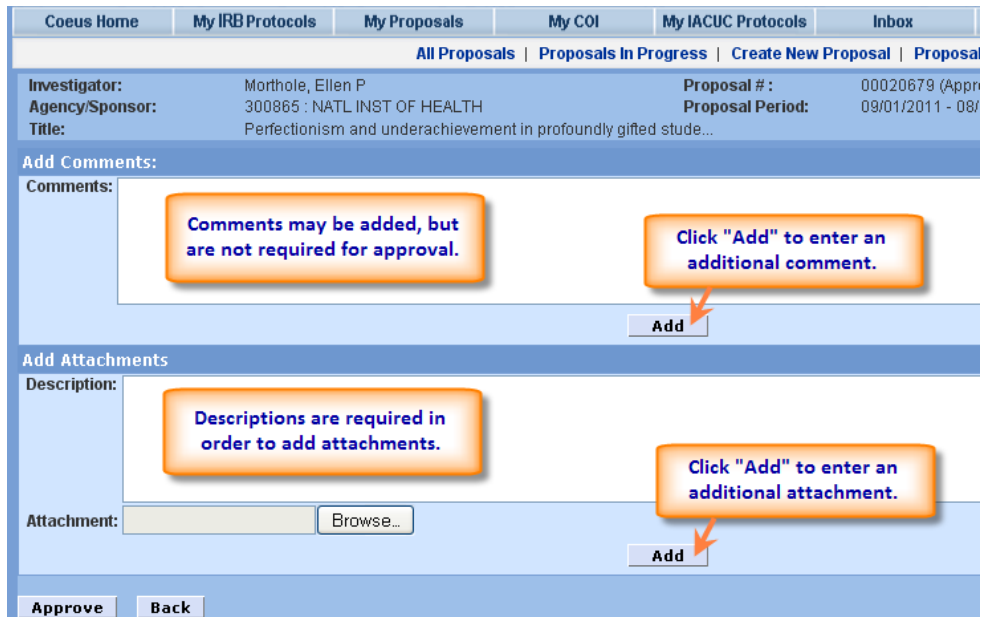
1) If this proposal is funded, will you need multiple accounts? [more](#)

# Approve a Proposal Development Record

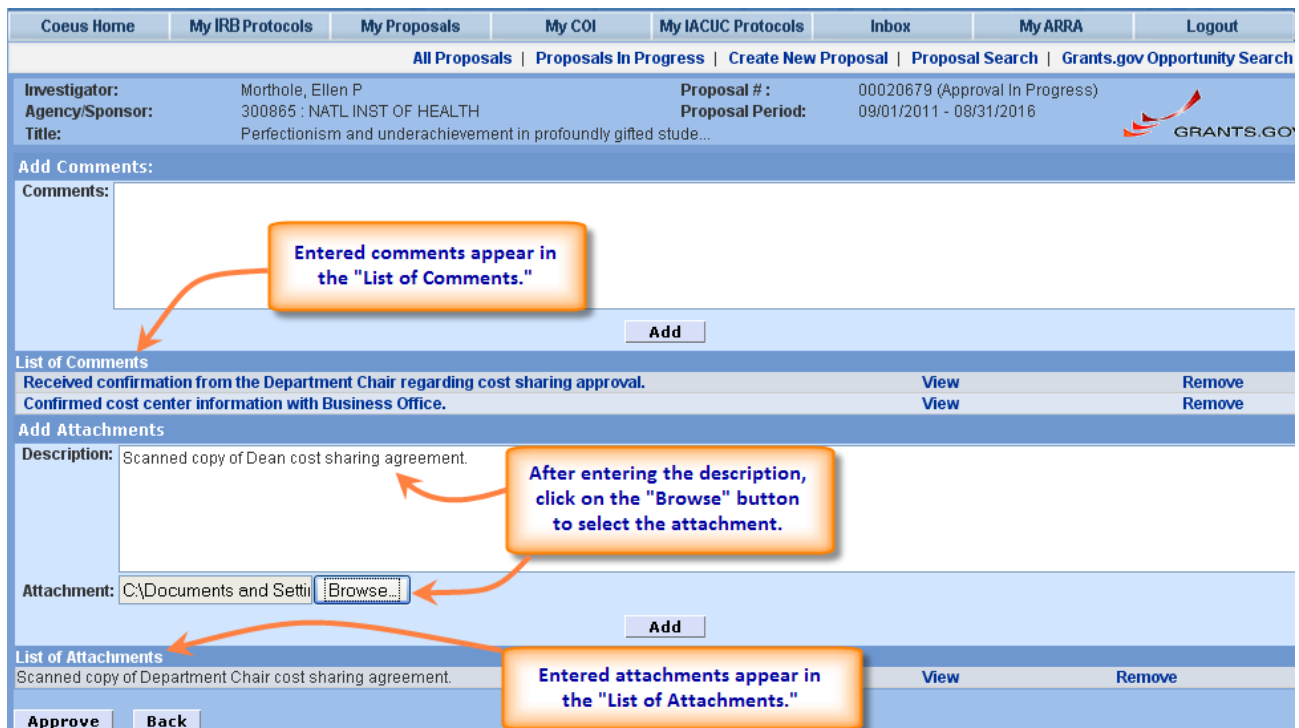
On the Proposal Summary screen, click on the "Approve" link:



From the Approval screen, comments and/or attachments may be added; they are not required:



Once added, comments and attachments are listed:



Click on the "Approve" button to finalize the approval, with or without comments or attachments.

The screenshot shows the 'Add Attachments' form with a 'Description' text area, an 'Attachment' field with a 'Browse...' button, and two buttons at the bottom: 'Approve' and 'Back'. The 'Approve' button is highlighted with an orange border.

Click on the "Back" button to return to the Proposal Summary screen without approving.

The screenshot shows the 'Add Attachments' form with a 'Description' text area, an 'Attachment' field with a 'Browse...' button, and two buttons at the bottom: 'Approve' and 'Back'. The 'Back' button is highlighted with an orange border.

## Reject a Proposal with Comment (comment is required):

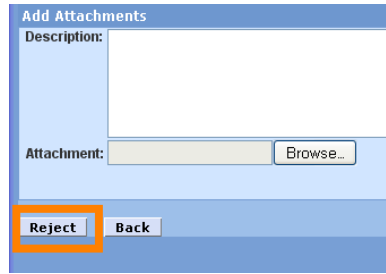
On the Proposal Summary screen, click on the "Reject" link:

The screenshot shows the 'Proposal Summary' screen. On the left side, there is a vertical menu with links: 'Back to Inbox', 'Proposal Details', 'Approval Routing', 'Approve', and 'Reject'. The 'Reject' link is highlighted with an orange border. On the right side, there is a summary of the proposal details.

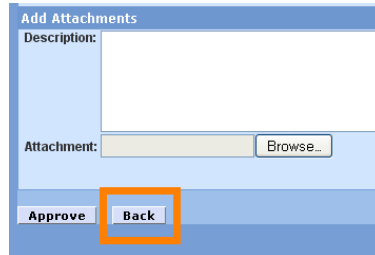
All Proposals   Proposals	
<b>Proposal Summary</b>	
Investigator:	Morthole, Ellen P
Agency/Sponsor:	300865 : NATL INST
Title:	Little heartbeats
<b>Budget Summary</b>	

The screenshot shows the 'Add Comments' and 'Add Attachments' sections. The 'Add Comments' section has a text area with a callout box that says: "Comments are required for rejected proposals. Comment should explain the reason for the rejection and required corrective measures." The 'Add Attachments' section has a 'Description' text area, an 'Attachment' field with a 'Browse...' button, and a callout box that says: "Attachments may be added, if desired. Instructions are found in 'Approve a Proposal,' above." At the bottom, there are 'Reject' and 'Back' buttons.

Click on the "Reject" button to finalize the rejection.



Click on the "Back" button to return to the Proposal Summary screen without rejecting.



## Approval Routing

On the Proposal Routing screen, a text description is displayed after the approver's name. Status icons are defined in the legend at the bottom of the panel.

**These are the separate steps where this proposal is reviewed.**

**This is the status of the approval for primary and alterante reviewers at these nodes.**

Department Required for Proposal Approval	
Below is the list of the Approvers who are required to approve this proposal before it may be submitted to the agency.	
<b>(00000001) SD Approval Map</b> <span style="float: right;">Hide</span>	
	Schleicher, Timothy N
	Rost, Amy B
	Taylor, Robert E
	Yuan, Yingdong E
	Morthole, Ellen P
	Schultz, Ronald
<b>(SOM) SOM ORA Approval</b> <span style="float: right;">Show</span>	
<b>(17049000) Neurology approval map</b> <span style="float: right;">Hide</span>	
	Monteiro de Castro, Fernanda
	Johnson, Nicole

**Hide Legend**

- Primary Approver
- Approved by other
- To be submitted
- Alternate Approver
- In progress
- Waiting for approval
- Approved
- Passed
- Delegated
- Bypassed
- Rejected

Note the change in icon and text status after an action has been taken:

	Yuan, Yingdong E	Approved by other		
	Morthole, Ellen P	Approved	<a href="#">Comments</a>	<a href="#">Attachments</a>
	Schultz, Ronald	Approved by other		