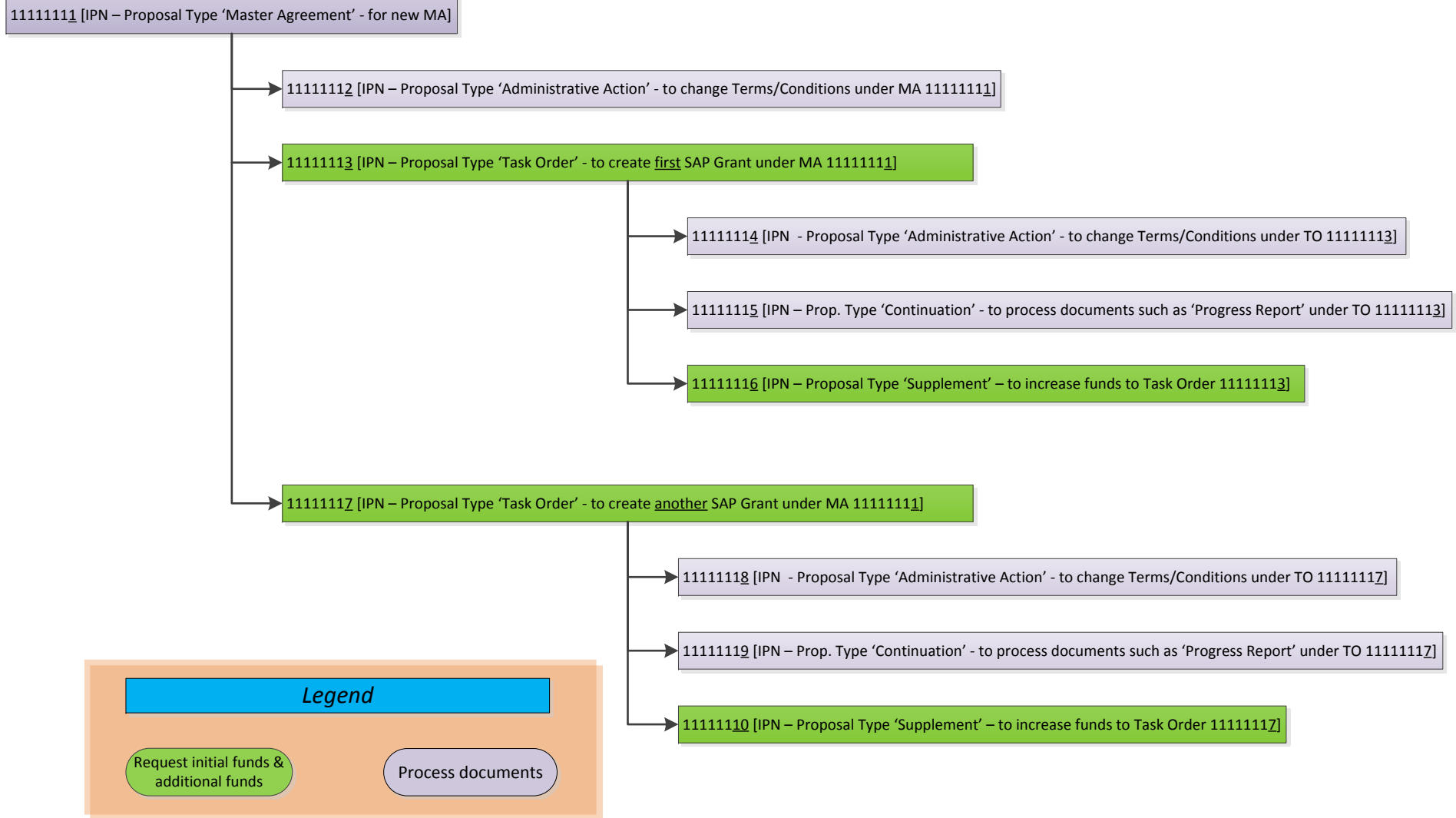


**Simplified Coeus Master Agreement/Task Order Process
A Guide
[Version: A]**

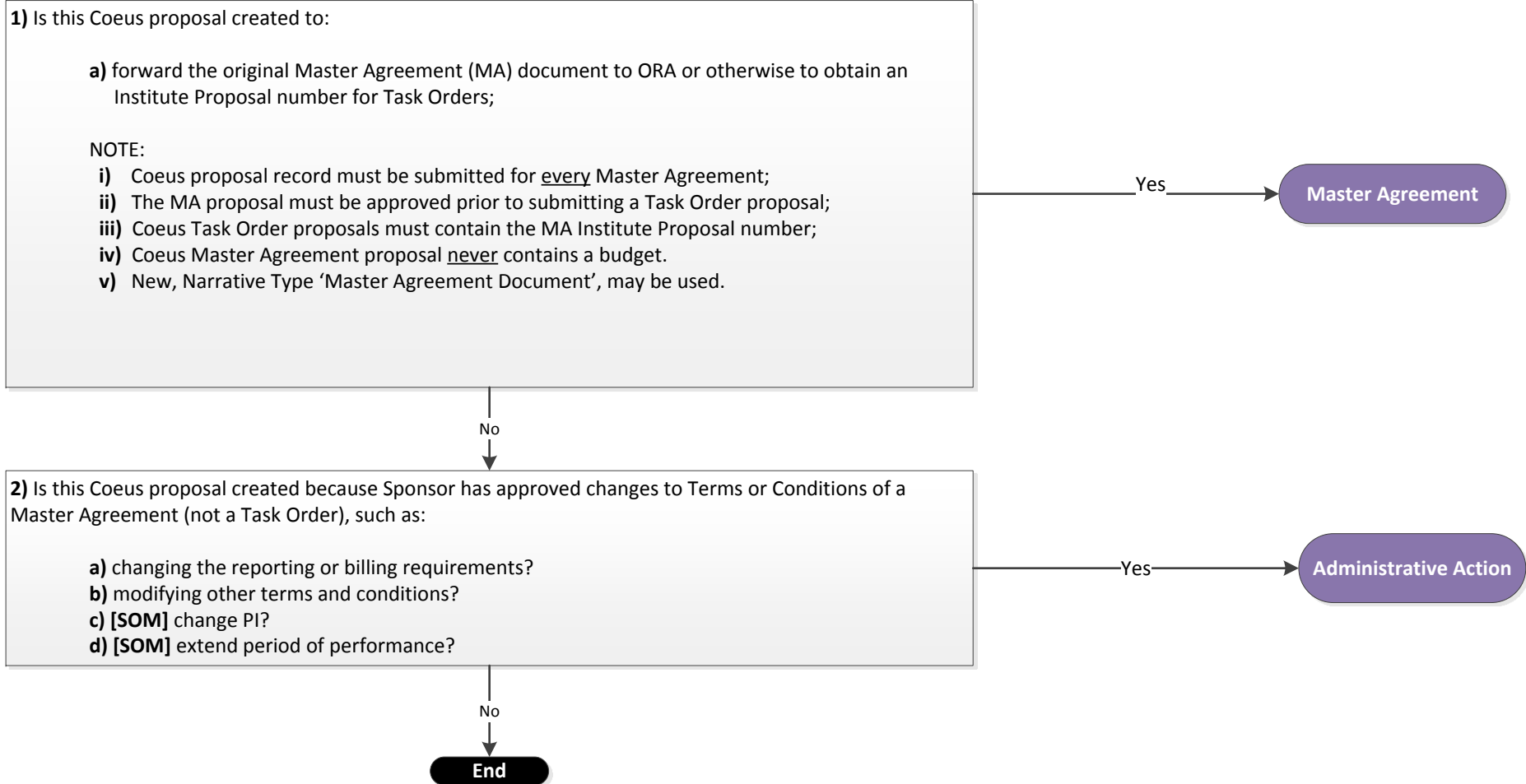
Executive Summary:
Simplified Coeus Master Agreement/Task Order Process

- Current 'Four Scenario' process, adopted in 2011, created several problems:
 - a) Overly complex Coeus process - Users find it difficult to process MA/TO transactions in Coeus.
 - b) Siloed Master Agreements - cannot be seen across the Enterprise.
 - c) No comprehensive data - cannot provide accurate Enterprise-wide reports.
- The simplified process solves these problems, even Coeus complexity. The process introduces a new Proposal Type, 'Master Agreement'. An MA Coeus Proposal Development (PD) record is created/approved prior to submitting the first Task Order. Depending upon your ORA policy, a draft MA maybe submitted initially in order to obtain a Master Agreement Institute Proposal number (IPN) for the first Task Order PD. Because Institute Proposal (IP) records are visible across the Enterprise, Master Agreement IPs will be visible to Coeus Users. And, using Coeus Medusa will depict all Task Orders associated with each MA IP. Master Agreement PDs never contain budgets.
- The simplified process retains Proposal Type 'Task Order', but this proposal type must be submitted every time an SAP Grant needs to be created. Task Order PDs are always linked to their Master Agreement IPN and will be used for reporting purposes. Task Order PDs always contain budgeted amounts. Proposal Type 'New' is never used with the simplified Master Agreement/Task Order process.
- Amending MAs and TOs is greatly simplified in the Coeus process.
- All amendments to MAs will be processed merely by submitting a PD Proposal Type 'Administrative Action'.
- Task Order amendments take three forms: 1) Terms and Condition amendments will be processed as Proposal Type 'Administrative Action'; 2) progress reports will be processed using Proposal Type 'Continuation', and 3) increases in TO budget amounts will be processed as Proposal Type 'Supplement'. The simplified process never uses Proposal Types 'Negotiation Only', 'New', or 'Revision'.

Executive Summary: Coeus Institute Proposal Schematic



Master Agreement Process



Task Order Process: Part 1 (Request or add Funds)

Has ORA approved a Coeus proposal Type = Master Agreement and provided a 'Master' Institute Proposal number (IPN), to be entered as the 'Original Proposal' number on the Task Order PD)?

No

Submit the Coeus PD Proposal Type = Master Agreement.

Yes

1) Is this Coeus proposal created because:

a) Sponsor has approved a Ceiling Amount for a Grant and an Allocation amount and you wish to have SPSS create a Grant?

NOTE:

- i) Task Order is not workflowed to SPSS until NOA is issued.
- ii) New Narrative Type 'Task Order Document' may be used.

Yes

Task Order

No

2) Is this Coeus proposal created to increase the Ceiling amount of a Task Order, above the amount previously submitted through a Coeus Proposal?

Yes

Supplement

No

Continue Task Order:
Part 2

Task Order Process: Part 2 (Non-money Requests)

3) Is this Coeus proposal created to route a progress report or otherwise release previously requested funds?

Yes

Continuation

No

4) Is this Coeus proposal created to amend the terms and conditions of a Task Order, such as:
 a) to change the reporting or billing requirements?
 b) to modify other terms and conditions?
 c) to assign work under a TO or allocate Ceiling amount to a TO that were previously recorded in Coeus?
 d) [SOM] change PI on TO?
 e) [SOM] extend performance period, No Cost Extension, on TO?

Yes

Administrative Action

No

5) Do you wish to perform these, or related functions:
 a) adjust the amount on an Internal Order, but not change the Ceiling Amount?
 b) assign Investigator as PI on a new Internal Order or on an existing Task Order?
 c) create a pre-award account?

Yes

Follow your departmental procedures. These actions are not unique to the Master Agreement & Task Order process.

No

End

Master Agreement: Changes & General Guideline**1) New:**

- a) Proposal Type = Master Agreement.
 - i) Every new Master Agreement will be submitted to ORA in a Coeus Proposal, Proposal Type = 'Master Agreement'.
- b) Narrative Type = Master Agreement Document.
 - i) 'Master Agreement Document' is a required Narrative Type and may be used more than one time.
- c) Validation:
 - i) When Proposal Type = Master Agreement.
 - 1) No budget allowed in PD.
 - ii) When Proposal Type = Administrative Action, no Award No. will be required if the Original Proposal number was Proposal Type = Master Agreement.

2) Always:

- a) Every Proposal Type = 'Master Agreement' PD must be submitted to ORA prior to submitting the first Task Order PDs under the MA.
 - i) PD Master Agreement may contain a draft Agreement, if so labeled.
- b) The MA process only uses Proposal Types: 'Master Agreement' and 'Administrative Action'.

3) Never:

- a) Master Agreement PDs never use Proposal Types: 'Negotiation Only', 'New', or 'Revision'.
- b) Proposal Type = Master Agreement IP is never used to create an SAP grant.
 - i) SAP Grants linked only to IPN of Proposal Type = Task Order.
- c) Proposal Type = Master Agreement never contains a budget.

Task Orders: Changes & General Guideline

1) Always:

- a) Proposal Type = 'Task Order' always contains a budget.
- b) Proposal Type = 'Task Order' requires entering an 'Original Proposal Number' into the Coeus Proposal.
 - i) That number must be the IPN, Institute Proposal number, for the Master Agreement Proposal.
- c) Proposals submitted under a specific Task Order will require entering the 'Original Proposal Number' into Coeus.
 - i) That number must be the IPN, Institute Proposal number, for the initial Task Order proposal, Proposal Type = 'Task Order'.
- d) The TO process only uses four Proposal Types: i) 'Task Order', ii) 'Supplement', iii) 'Administrative Action' iv) 'Continuation'.

3) Never:

- a) Task Order PDs never uses Proposal Type: 'New' or 'Revision'.

Possible Coeus Process for Competitive Master Agreements

Obtain approval of ORA before processing a 'Competitive' Master Agreement in Coeus. If approved, follow these steps. Processing the MA & TO will cause Coeus to include the submission in the various Success Rate calculations. However, the Task Order PD should not be routed by ORA to SPSS; for Competitive MAs, it is merely a proposal, not an award.

1) Is this Coeus proposal created to submit:

a) **Competitive MA:** submit a Master Agreement Proposal to sponsor for *competitive* evaluation and potential award?
 [To be completed in conjunction with Step 2 below]

NOTE:

- i) Coeus proposal record must be submitted for Master Agreement prior to submitting a TO proposal;
- ii) Coeus Task Order proposals must contain the MA Institute Proposal number;
- iii) Coeus Master Agreement proposal never contains a budget.
- iv) New, Narrative Type 'Master Agreement Document', may be used.

Yes

Master Agreement

and

2) Is this Coeus proposal created because:

a) **Competitive MA:** submit a Proposal Type = Task Order to reflect 'proposed' amounts in the Competitive submission. Enter into the Summary Budget of this Task Order PD the total budget being proposed to the Sponsor.
 [To be completed in conjunction with Master Agreement in Step 1 above]

NOTE:

- i) Task Order is not work flowed to SPSS until NOA is issued.
- ii) After award, Task Order Institute Proposal is amended, updated with Award information.
- ii) New Narrative Type 'Task Order Document' may be used.

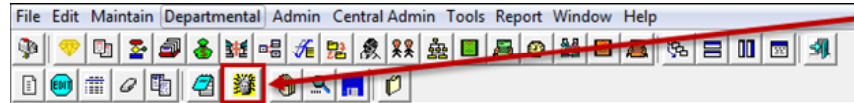
Yes

Task Order

No

Stop

Master Agreement w/ 4 Task Orders & 1 Adm. Action
~ Medusa View ~



Medusa - Award, Institute Proposal and Development Proposal Links

View

Proposal -> Award
 Award -> Proposal

18105795
00109136
\$ 090000-001
\$ 090003-001
\$ 090004-001
\$ 090005-001

18105796
00109137
\$ 090000-001

18105797
00109156
\$ 090003-001

18105798
00109157
\$ 090004-001

18105799
00109158
\$ 090005-001

18105800
00109159
\$ 090005-001

Proposal Type Master Agreement w/
attached Task Orders, Awards/Grants

Task Order #1 Grant 90000

Task Order #2 Grant 90003

Task Order #3 Grant 90004

Task Order #4 Grant 90005

Adm Action T. O. #4 Grant 90005

Need to search for a Master Agreement?

Step 1

Common search:

Proposal Development Module:



Search by: Investigator, Unit Number, Title, etc.

More targeted search:

Institute Proposal Module:



Search by: Proposal Types Master Agreement or Task Order.

Most targeted search:

Award Module:



Search by: SAP Award # (followed by '*') or just SAP Internal Order #.

Step 2

Highlight the record appearing in the Search Results List

Select the Medusa Icon:



Displayed will be the Medusa View similar to that on the previous page.

Highlight a record of interest.

Select the Display Icon:



Notes:

#1: Institute Proposal and Award records are public records and will open. Proposal Development records are protected and will open only for users with appropriate roles.

#2: Icon locations.

