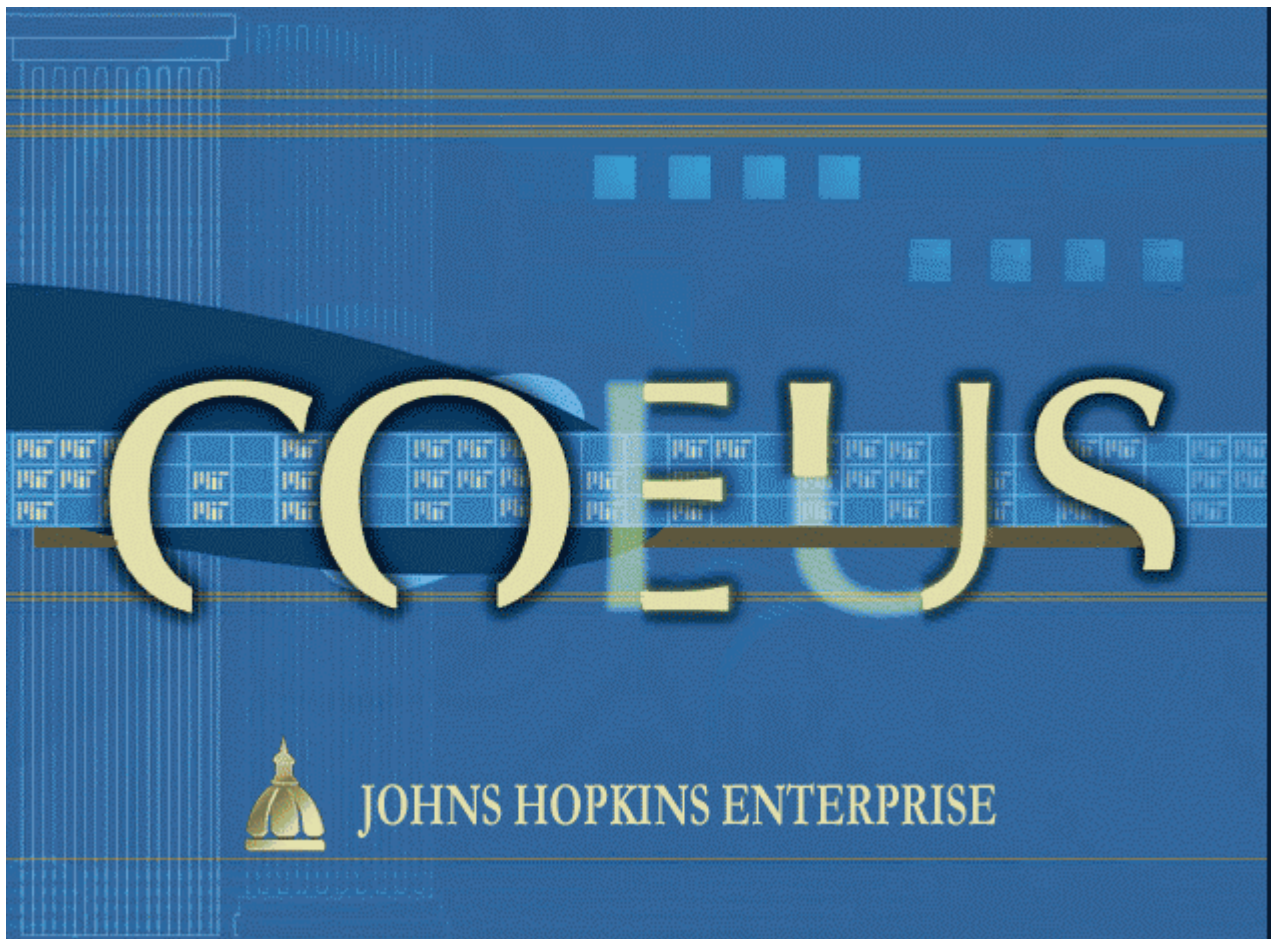


Coeus® Version 4.4.4

DEPARTMENT APPROVERS GUIDE

COEUS LITE



July, 2011

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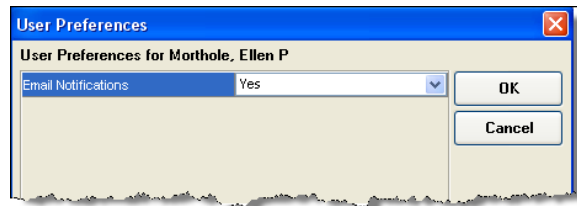
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As an Approver, you will automatically receive a notification when a proposal begins workflow and is awaiting your review and approval/rejection.

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.

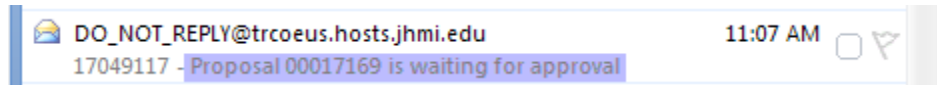
To change the default setting, you must log into Coeus Premium and from the menu select File>Preferences. This will open the user Preferences window where you will be able to change the default setting.



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:

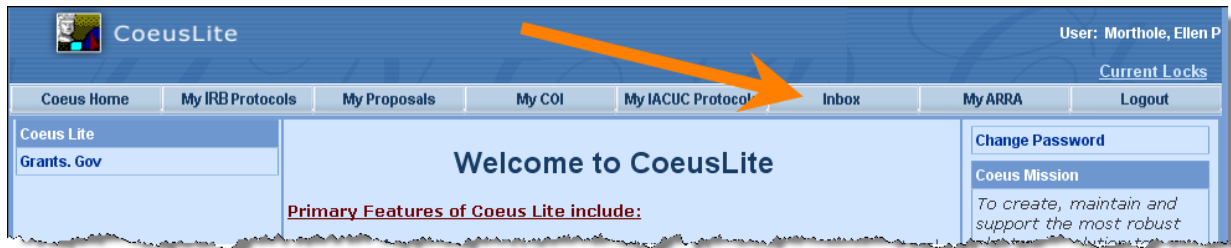
You can view this proposal through CoeusLite at the following address: <https://trcoeus.johnshopkins.edu/coeus/displayProposal.do?proposalNo=00017169>

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 top navigation bar is the same as in the previous image. Below it, there are tabs for 'Unresolved Messages', 'Resolved Messages', and 'Proposal Search'. The main content area is titled 'Unresolved Messages for Coeus Application' and contains a table of messages. The table has columns for 'From', 'Message', 'Proposal Title', 'Proposal Number', and 'Date Received'. Each row has a checkbox on the left and a color-coded flag icon. The flags are red, green, yellow, and red. The messages are from 'Pio Roda, Marissa' and 'Morthole, Ellen P'. The proposal titles are 'Little heartbeats', 'Perfectionism and underachievement in profoundly gifted students', 'Education initiatives to address PG', and 'Twice Exceptionality in Elementary School-age Children'.

| <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. | Little heartbeats | 00017229 | 02/16/2011 10:36 AM |
| <input type="checkbox"/> | Morthole, Ellen P | You are designated as an alternate approver for this proposal. | Perfectionism and underachievement in profoundly gifted students | 00017228 | 02/16/2011 10:15 AM |
| <input type="checkbox"/> | Morthole, Ellen P | You are designated as an alternate approver for this proposal. | Education initiatives to address PG | 00017227 | 02/16/2011 10:10 AM |
| <input type="checkbox"/> | Morthole, Ellen P | The Proposal has been rejected by Morthole, Ellen P | Twice Exceptionality in Elementary School-age Children | 00017226 | 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. | Little Heartbeats | 00020675 | 07/01/2011 02:56 PM |
| <input type="checkbox"/> | | Atlass, Jessica | You are designated as an alternate approver for this proposal. | Perfectionism and underachievement in profoundly gifted students | 00020676 | 07/01/2011 02:55 PM |
| <input type="checkbox"/> | | Atlass, Jessica | You are designated as an alternate approver for this proposal. | Education Initiatives to address PG in Public School Classrooms | 00020677 | 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.

Proposal Summary

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... GRANTS.GOV™

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
 Budget Period

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

Attachments

| Type | Description | View |
|--|-------------|----------------------|
| PHS_ResearchPlan_SpecificAims | Complete | View |
| PHS_ResearchPlan_InclusionOfWomenAndMinorities | Complete | View |
| Investigator Certifications | Complete | View |
| PHS_Career_InclusionOfChildren | Complete | View |

List of Investigators/Key Study Personnel

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

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

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

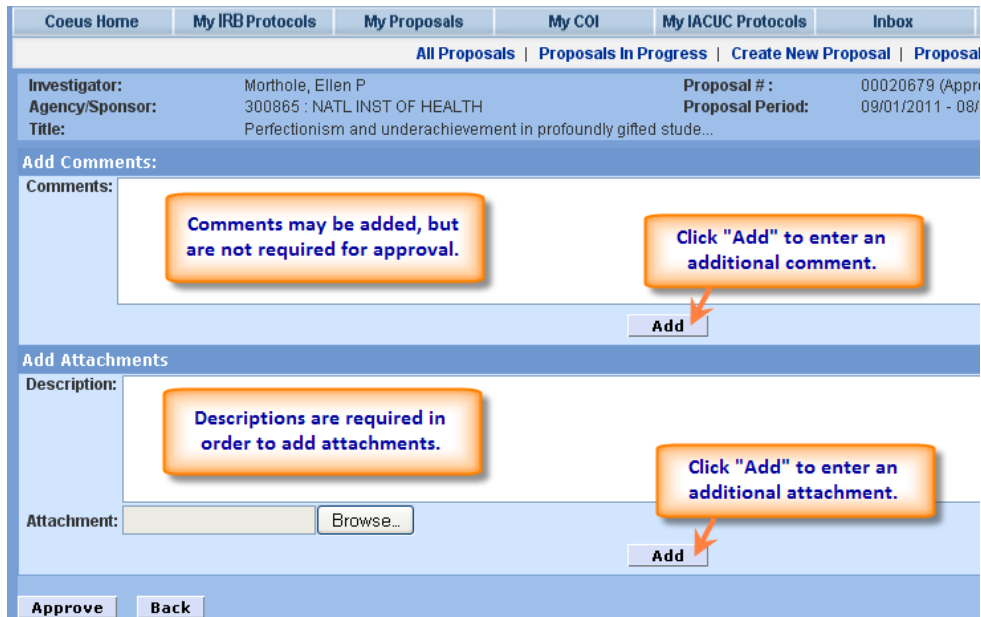
Review answers to questionnaires here.

Approve a Proposal Development Record

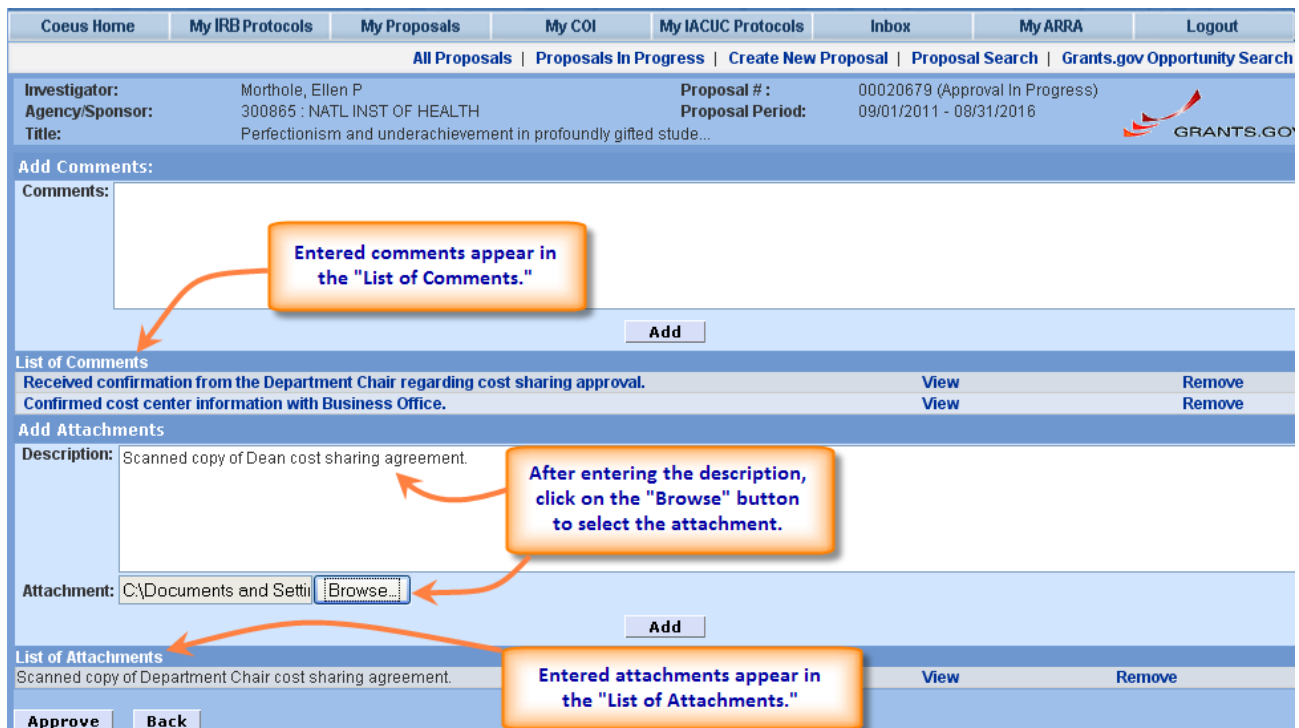
On the Proposal Summary screen, click on the "Approve" link:



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:

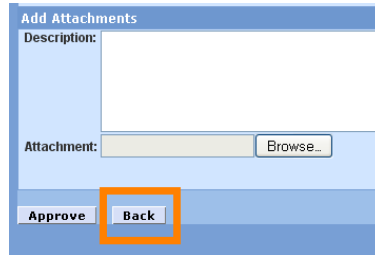
The screenshot shows the Proposal Summary screen with a navigation menu on the left containing 'Back to Inbox', 'Proposal Details', 'Approval Routing', 'Approve', and 'Reject'. The 'Reject' link is highlighted with an orange border. The right side of the screen shows details for the proposal, including the investigator's name, agency, and title.

The screenshot shows the 'Add Comments' and 'Add Attachments' sections. The 'Add Comments' section has a text area with a callout box stating: '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 stating: '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. | | | |
| (00000001) SD Approval Map Hide | | | |
| | Schleicher, Timothy N | Waiting for approval | |
| | Rost, Amy B | Waiting for approval | |
| | Taylor, Robert E | Waiting for approval | |
| | Yuan, Yingdong E | Waiting for approval | |
| | Morthole, Ellen P | Waiting for approval | |
| | Schultz, Ronald | Waiting for approval | |
| (SOM) SOM ORA Approval Show | | | |
| (17049000) Neurology approval map Hide | | | |
| | Monteiro de Castro, Fernanda | ByPassed | Comments Attachments |
| | Johnson, Nicole | ByPassed | Comments Attachments |

[Hierarchy](#)

[Hide Legend](#)

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

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

| | | | |
|--|--------------------------|-------------------|--|
| | Yuan, Yingdong E | Approved by other | |
| | Morthole, Ellen P | Approved | Comments Attachments |
| | Schultz, Ronald | Approved by other | |