

Master Agreement (MA) records are created/approved in Coeus to link a series of Task Orders (TO) through the MA's Institute Proposal Number (IPN). Depending upon your ORA policy, a draft MA may be submitted in order to obtain an IPN for the first TO.

Institute Proposal (IP) records are visible across the Enterprise, therefore MAs are visible to all Coeus users. Using Medusa in Coeus will depict all TOs associated with an MA. Master Agreement PDs never contain budgets, as budgets are contained in the linked Task Orders. **Every time a new SAP grant needs to be created, a new TO must be created in Coeus and linked to the MA by entering the MA's IPN into the "Original Proposal" field in the proposal development (PD) record.**

Any amendment to an MA is processed by creating a linked PD with the proposal type "Administrative Action."

Amendments to TOs can be one of three types:

1. Terms and Conditions, processed as an Administrative Action,
2. Progress Reports, processed as a Continuation, and
3. Increases to budget amounts, processed as a Supplement.

The following proposal types are never used with Master Agreements or Task Orders:

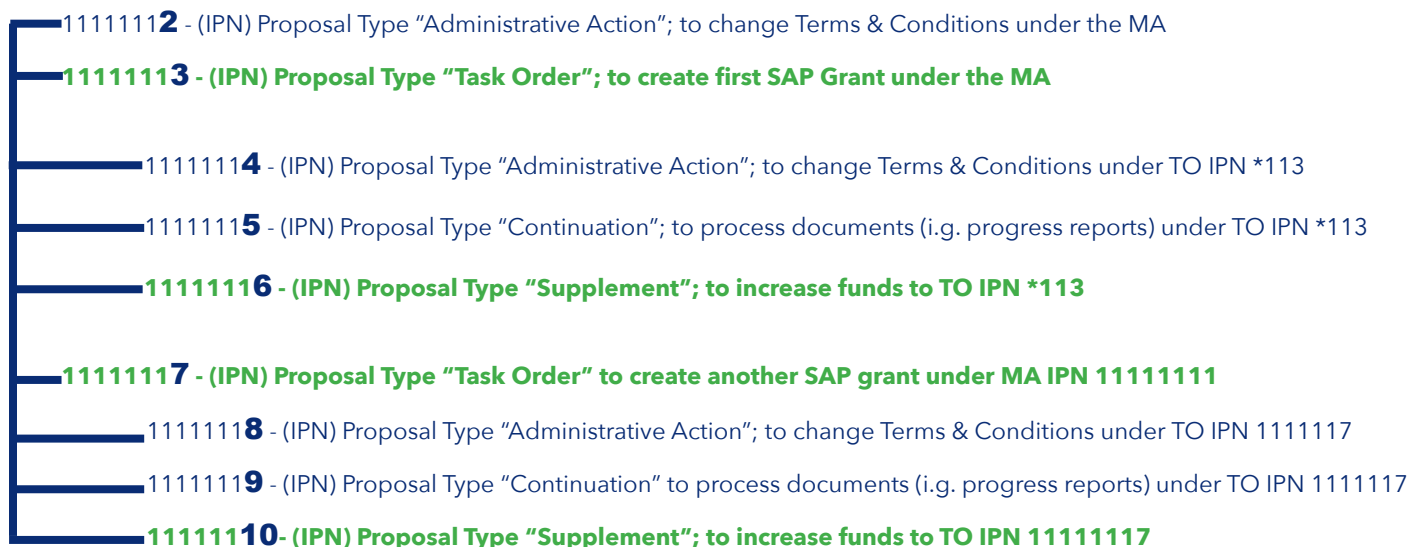
- Negotiation Only
- New
- Revision

## Example of a Master Agreement with Actions and Task Orders

**Blue = Process Documents**  
*NO dollars are requested.*

**Green = New Dollar requests**

### 11111111 - (IPN) Proposal Type "Master Agreement"



## Proposal Type Selection through MA Process

### Master Agreement

1. Forward an original Master Agreement (MA) document to ORA, or
2. to obtain an Institute Proposal number to process Task Orders (TO).

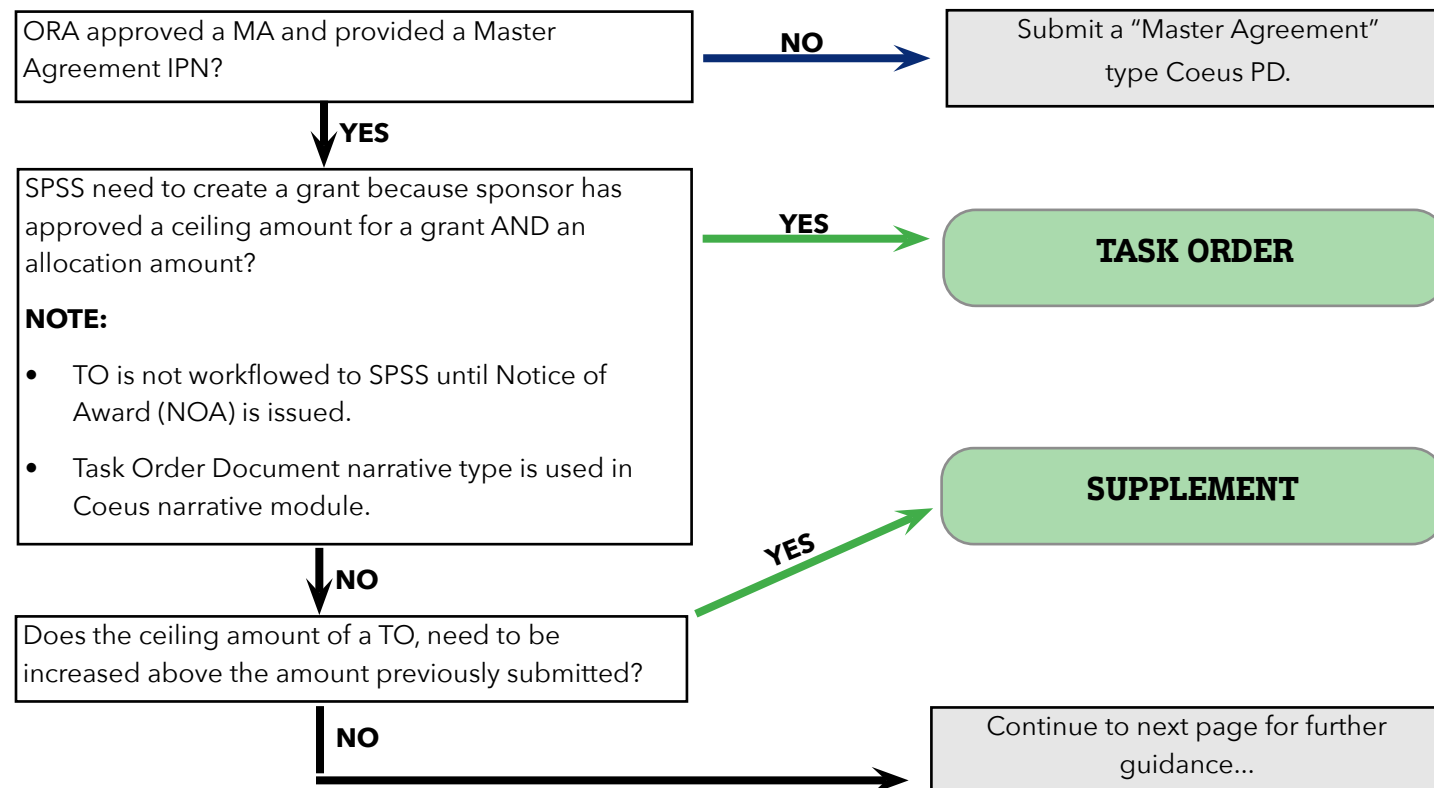
#### NOTE:

- A Coeus PD record must be submitted for every Master Agreement;
- The MA PD must be approved before submitting a Task Order PD;
- TO PDs must contain the MA Institute Proposal Number (IPN);
- MA proposals never contain a budget (because they are viewable enterprise-wide)
- "MA Document" narrative type is used to upload the MA in the Coeus Narrative module.

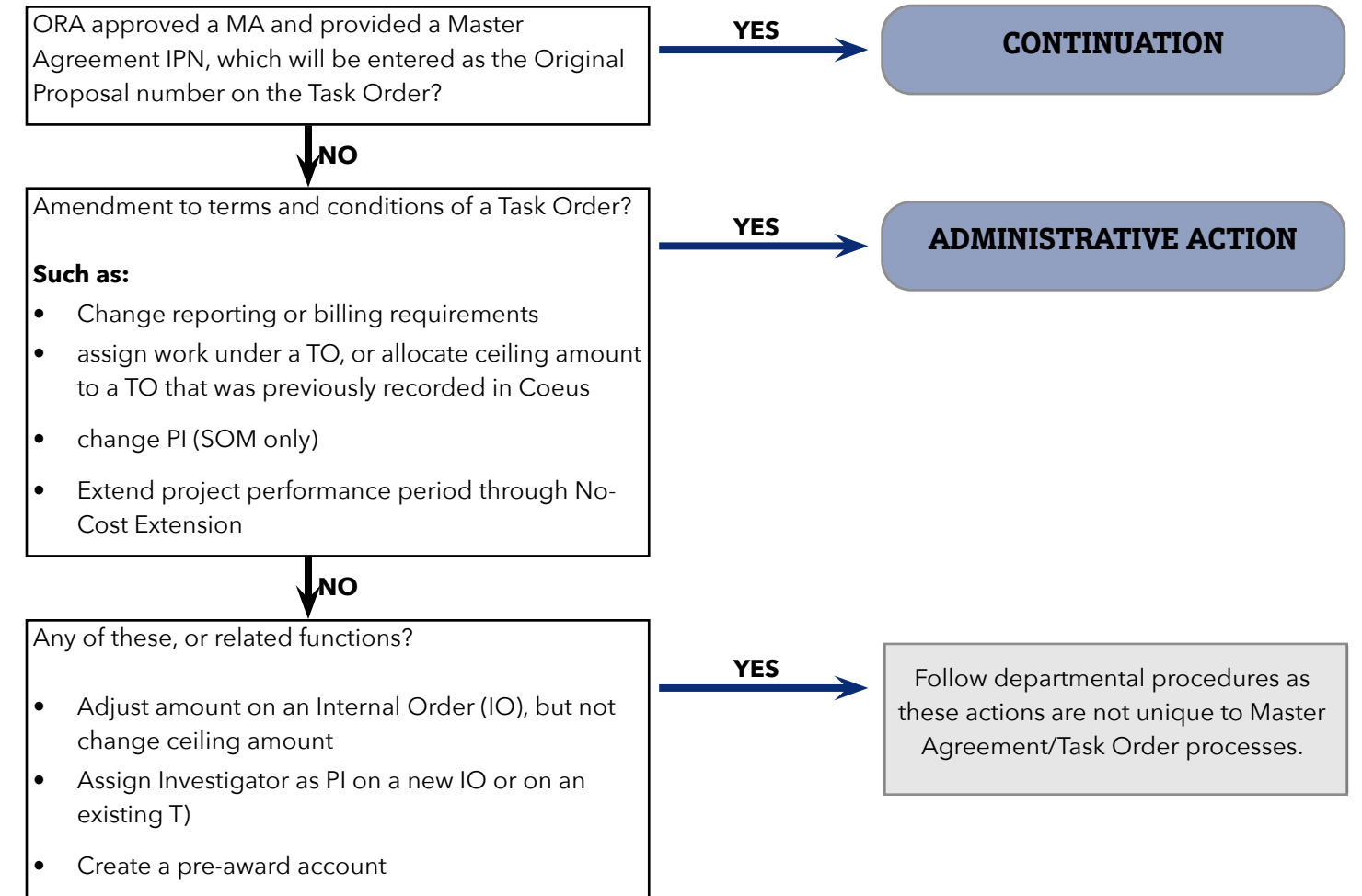
### Administrative Action

1. Notification of sponsor-approved modifications to terms & conditions of an MA (not a TO), such as
  - Changing reporting or billing requirements
  - Change of PI (SOM only)
  - Extend project performance period

## Task Order Proposal Type Decision Tree



## Task Order Proposal Type Decision Tree (continued)



## Important Guidance in a Nutshell

### MASTER AGREEMENTS

- "Master Agreement Document" narrative type may be used more than once in the Coeus narrative module.
- Master Agreement PDs never contain a budget.
- Administrative Actions do not require an award number if the IPN entered refers to a Master Agreement type.
- Master Agreements must be submitted to ORA prior to submitting the first Task Order. MA PD may contain a draft agreement, if it is so labeled.
- Master Agreement PDs should never use proposal types: Negotiation Only, New, or Revision.
- Master Agreement IP does not create an SAP grant; grants are created only through Task Order PDs.

### TASK ORDERS

- Task Order PDs always contain a budget.
- Task Order PDs always have the MA's IPN entered in the Original Proposal Number field, but
- PDs submitted under a SPECIFIC TO always have the TO's IPN entered in the Original Proposal Number field.
- TO PDs use only proposal types: Task Order, Supplement, Administrative Action or Continuation.
- TO PDs never use proposal types: New or Revision