

Master Agreement Guide

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"

—11111112 - (IPN) Proposal Type "Administrative Action"; to change Terms & Conditions under the MA

=11111113 - (IPN) Proposal Type "Task Order"; to create first SAP Grant under the MA

11111115 - (IPN) Proposal Type "Continuation"; to process documents (i.g. progress reports) under TO IPN *113

—11111116 - (IPN) Proposal Type "Supplement"; to increase funds to TO IPN *113

-11111117 - (IPN) Proposal Type "Task Order" to create another SAP grant under MA IPN 1111111

___11111118 - (IPN) Proposal Type "Administrative Action"; to change Terms & Conditions under TO IPN 1111117

11111119 - (IPN) Proposal Type "Continuation" to process documents (i.g. progress reports) under TO IPN 1111117

111111110- (IPN) Proposal Type "Supplement"; to increase funds to TO IPN 11111117

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Proposal Type Selection through MA Process

Administrative Action

1. Notification of sponsor-approved modifications to

terms & conditions of an MA (not a TO), such as

Extend project performance period

Change of PI (SOM only)

Changing reporting or billing requirements

Task Order Proposal Type Decision Tree (continued)

Master Agreement

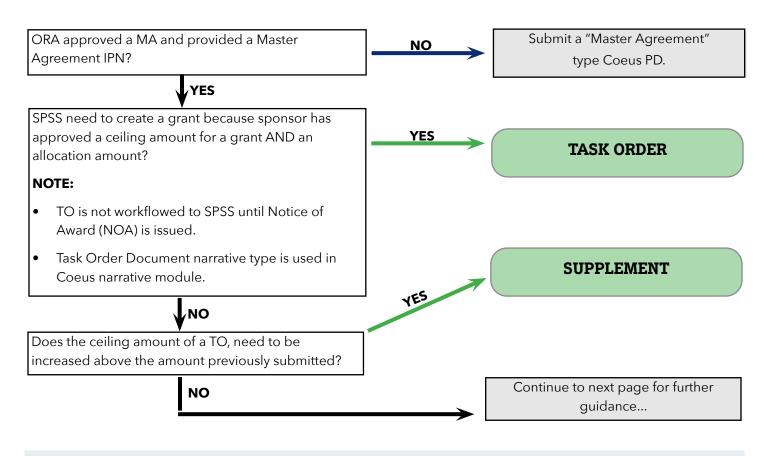
1. Foward an original Master Agreement (MA) document to ORA, or

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.

Task Order Proposal Type Decision Tree



ORA approved a MA and provided a Master Agreement IPN, which will be entered as the Original Proposal number on the Task Order?

NО

Amendment to terms and conditions of a Task Order?

Such as:

- Change reporting or billing requirements
- assign work under a TO, or allocate ceiling amount to a TO that was previously recorded in Coeus
- change PI (SOM only)
- Extend project performance period through No-Cost Extension

NO

Any of these, or related functions?

- Adjust amount on an Internal Order (IO), but not change ceiling amount
- Assign Investigator as PI on a new IO or on an existing T)
- Create a pre-award account

MASTER AGREEMENTS

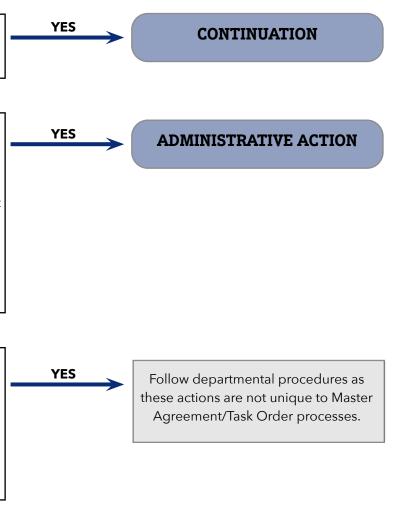
- Master Agreement PDs never contain a budget.
- draft agreement, if it is so labeled.
- Master Agreement PDs should never use proposal types: Negotiation Only, New, or Revision.
- Master Agreement IP does not create an SAP grant; grants are created only through Task Order PDs.

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
- TO PDs use only proposal types: Task Order, Supplement, Administraative Action or Continuation.
- TO PDs never use proposal types: New or Revision

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Important Guidance in a Nutshell

• "Master Agreement Document" narrative type may be used more than once in the Coeus narrative module.

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

• PDs submitted under a SPECIFIC TO always have the TO's IPN entered in the Original Proposal Number field.

