Research Administration (RA) Guide to editing Coeus Institute Proposals (IPs) (Version: April 23, 2019)

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1. Coeus Proposal Types by major characteristics

Proposal Types	IP included in Enterprise Reporting?	IP sent to SPSS?	IP used to create SAP Awards?
Competing Types			
New	Y	Y	Y
Renewal	Y	Y	Y
Resubmission	Y	Y	Y
Task Order	Y	Y	Y
Supplement	Y	Y	Y
Non-competing Types			
Administrative Action	N	N	N
Continuation	N	N	N
Internal Application	N	N	N
Master Agreement	N	N	N
Negotiation Only	N	N	N
Pre-application	N	N	N
Revision	N	N	N

2. Proposal Development (PD) record is not edited

As a rule, PD's are not edited after final approval by RA.

Once approved by RA, Coeus creates a corresponding unique Institute Proposal (IP) record. The PD record is then 'archived' and preserves exactly what the Principal Investigator submitted. Edits required post-submission should be made by the RA in the PD's IP record. However, RAs may email ORIS if they believe a PD edit is necessary.

3. Coeus Notepad: attaching a description (comment) of edit made to an IP record

Following certain edits to the IP record RAs should consider adding a brief description of the changes in *that* IP record's Notepad. It is easy to inform others of actions taken.

1. From within the open IP record

file Details Maintain Departmental Admin Central Admin Report Window Help									
Louting De Notepad - Forey 10075488 Sequence 2									
Institute Prd Procepad & Entry 19075448 Sev	puence 2 6	Contrast O los							
Tinstitute Pid Notepad V Entry 19075448 Sev	quence 2 🚺								
Institute Provocad & Entry 19075448 Sev Proposal Mailing Info Investigators Key 6	guence 2 🚯 Person Cost Sharing IDC rates Special Review Science Codes IP Review Others								
Proposal Mailing Info Investigators Key (Person Name	Person Cost Sharing IDC rates Special Review Science Codes IP Review Others Pi Multi Pi Faculty Effort & Academic Summer Colordar Pi Multi Pi Faculty Effort & View Effort								
Institute Professional Key 19075448 Sec Proposal Mailing Info Investigators Key 1 Person Name Zeger, Scott	Person Cost Sharing IDC rates Special Review Science Codes IP Review Others Pi Multi Pi Fisculty Effort % Academic Summer Calendar Pi Multi Pi Fisculty Effort % Orar Effort Year Effort Year Effort 0.00 .00 .00	Add							

- 3. From within Notepad
- 4. Select 'Add new row', 1, Icon

File Edit Maintain Departm	nental Admin Central Admin Report Window Help							
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Add new row								
Notepad (3)								
View	Notes for Institute Proposal - 19075448							
Proposal -> Award								
Award -> Proposal								
19075448 00121122								

- 5. Your name
- 6. Time stamp
- 7. Enter description of edit made
- 8. Save Note



9. Close Notepad

4. Change Institute Proposal (IP) record Status to: Withdrawn, Not Funded, or Void

- a. IP Proposal Type: Any
- b. IP Status: Pending
- c. Do this:
- 1. Open IP in Edit
- 2. Change Status
- 3. Make a note in Notepad describing the changes you made
- 4. Save IP record

5. Add Special Review Protocols to IP record

- 1. Select Special Review Tab
- 2. Select the Special Review topic
- 3. Select Approved
- 4. Enter Protocol number
- 5. Enter Protocol Approval Date

🛃 Di	isplay Institute Propo	osal 18	Sequence 1				
Prop	oosal Mailing Info	Investigators	Key Person	Cost Sharing	IDC rates	Special Review	Science Codes I
Sp	ecial Reviews						
	Special Review		Approval	Protocol No.	Appl. Date	Appr. Date	
-34	Animal Usage 🛛 🖉		Approved 3	MO18M308		10-Jan-2019	Add
							Delete
							Find

- 6. No note is required
- 7. Save IP record

6. Link an IP to an Award when IP Status = Pending (*)

- a. IP Proposal Type: Supplement
- b. IP Status: Pending
- c. Do this:
- 1. Open Award Module, 🛄, Icon
- 2. Search for the six-digit SAP award number followed by '-001'
- 3. Open Award record in Edit



- 5. Select Add Button
- 6. Enter IP number and select Find
- 7. Highlight the IP record
- 8. Select Ok Button
- 9. Save record

(*) To unlink, remove, an IP from an Award see topic 8-f, below.

7. Link an IP to an Award when IP status = Not Funded (*)

- a. IP Proposal Type: Supplement
- b. IP Status: Not Funded
- c. Do this:
 - i. First, change IP Status to Pending:
 - 1. Open IP in Edit
 - 2. Change Status to Pending
 - 3. Make a comment in Notepad describing the changes you made
 - 4. Save IP record
 - ii. Then, link IP to Award by:
 - 1. Open Award Module
 - 2. Open Award record in Edit
 - 3. Select Details > Funding Proposal
 - 4. Select Add Button
 - 5. Enter IP number and select Find
 - 6. Highlight the IP record
 - 7. Select Ok Button
 - 8. Save record

(*) To unlink, remove, an IP from an Award see topic 8-f, below.

8. IP edits that require the Sequencing of the IP record

a. How to 'sequence' an IP record

- 1. IP Proposal Type: Any
- 2. IP Status: Any
- 3. Do this:
 - a. To preserve the original (current) IP record, e.g. 'Sequence 1', start the

edit process by selecting the Icon "Proposal New Entry", Icon 🍱



And, continue making necessary edits as described below.

b. Change the Principal Investigator (PI) – while keeping original PI

- 1. Confirm new Sequence number
- 2. Select Investigator Tab
- 3. See Original PI
- 4. See Lead Unit

Prop	posal Mailing Info	Investigators Koperso	n Cost Sharing ID	C rates Specia	al Review Science	e Codes IP Review	w Others	
3	Person Name Burgdorf, Julia	3	Pl Multi Pl	Faculty Effort	Academic Year Effort .00 .00	Summer Calenda Year Effort Year Ef	ar ffort .00	Add Delete
								Find Perso
	Lead Number	Name			Osp Admi	nistrator		Add Unit
\$	Lead Number ✓ [16040100	A Name ACADEMIC SPO	DNSORED		Osp Adm Hopkins	nistrator , Jennifer		Add Unit

- 5. Select Find Person and search for new PI (example: Scott Zeger)
- 6. Place checkmark in "PI" box next to new PI name
- 7. Select Find Unit and search for Lead Unit of proposal (#4 above)
- 8. Place checkmark in "Lead" unit number box of this IP record

n 🖥	stitute	Proposal New	Entry 1907544	18 Sequence	2						-	- 0
Prop	posal	Mailing Info	Investigators	Key Person	Cost Sharing	IDC rates	Special Rev	view Science	e Codes IP	Review Oth	iers	
	Perso	n Name			PI Multi	PI Faculty	Effort %	Academic Year Effort	Summer Year Effort	Calendar Year Effort		Add
	Burg	dorf, Julia					.00	.00	.00	.00		Delete
4	Zege	r, Scott			- (6)	v	.00	.00	.00	.00	5	Find Person
	Lead	Number	Name					Osp Admi	nistrator		=10	Add Unit
2	m	16015000	BIOS	STATISTICS				Sparks,	Denise			Del Unit
8	1	16040100	ACA	DEMIC SPON	SORED			Hopkins	, Jennifer		7	Find Unit

- 9. Make a comment in Notepad describing the changes you made
- 10. Save IP record

c. Change the Principal Investigator (PI) – while removing original PI

- 1. Confirm new Sequence number
- 2. Select Investigator Tab
- 3. Point to PI
- 4. Select Delete

Prop	titute osal	Proposal New Mailing Info	Entry 1907544 Investigators	48 Sequence	2 1 Cost Sha	aring IC)C rates	Special Revi	ew Scienc	e Codes 1	P Review	Others	- 0
6	Persor	h Name dorf, Julia		•	PI V	Multi Pl	Faculty	Effort %	Academic Year Effort .00	Summer Year Effort	Calendar Year Effor	<u>t</u> 00 (4)	Add Delete Find Person
134	Lead	Number 16040100 17046525	Nam ACA INFE	DEMIC SPON	NSORED SEASES				Osp Admi Hopkins Alston-F	nistrator , Jennifer Rodgers, K	atrina M		Add Unit Del Unit Find Unit

- 5. Find Person...new PI (example: Scott Zeger)
- 6. Place checkmark in "PI" Box
- 7. Select Find Unit and search for Lead Unit of proposal
- 8. Place checkmark in "Lead" unit number box of this IP record

22 I	nstitute	Proposal New	/ Entry 1907544	8 Sequence	2									C	- 0	×
Pro	oposal	Mailing Info	Investigators	Key Person	Cost Sharin	g ID	C rates	Special Re	view	Scienc	e Codes	IP Review	Other	s		
	Perso	n Name			PI 📕	ti Pl	Faculty	Effort %	Aca	demic Filori	Summer Year Effor	Calendar Year Eff			Add	
-34	Zege	r, Scott			— v 6		~	.0		.00			.00		Delet	•
														5	Find Per	son
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	Lead	Number	Name	•						Osp Admi	nistrator				Add U	nit
8		16015000	BIOS	TATISTICS						Sparks,	Denise				Del Ur	vit
3	-	16040100	ACA	DEMIC SPON	ISORED				j	Hopkins	, Jennifer				Find U	nit

- 9. Make a note in Notepad describing the changes you made
- 10. Save IP record

d. Change Lead Unit

- 1. Confirm new Sequence Number
- 2. Select Investigator Tab
- 3. Find Unit Lead Unit number
- 4. Place checkmark in "Lead" unit number box of this IP record

🔓 Ins	titute	Proposal New	Entry 1812011	2 Sequence	2									
Prop	osal	Mailing Info	Investigators	Key Person	Cost Sha	ring ID	C rates	Special Revi	ew Scienc	e Codes IP	Review	thers		
	Persor	Name	2		PI	Multi Pl	Faculty	Effort %	Academic Year Effort	Summer Year Effort	Calendar Year Effort		A	bt
÷3	Schaf	er, Benjamin			\checkmark		-	5.00	.00	.00	5.00	ō	Del	ete
													Find P	Person
													Add	Ibit
	Lead	Number	Name						Osp Admi	nistrator				
101		12014300	CIVI	_ ENGINEERI	NG				Cusima	10, Gail L			Del	Unit
4	v	12084300	COLI	D-FORMED S	TEEL RES	EARCH	CONSOF	RTIUM	Cusima	no, Gail L		3	Find	Unit

- 5. Make a comment in Notepad describing the changes you made
- 6. Save IP record

e. Change Sponsor

- 1. Confirm new Sequence Number
- 2. Select Proposal Tab
- 3. Find Sponsor

🛃 Institute Proposal N	ew Entry 18120112 Sequence 2	
Proposal Mailing Int	fo Investigators Key Person Cost Sharing IDC rates Special Review Science Codes IP Review Others	
Proposal No: Merged With:	18120112 Seq No: 2 Award Number: 122055-001 Status: Funded	
Title:	Optimization and Application of Next Generation Steels in Construction	
Proposal Type:	New Sponsor Prpsl No:	
Account:	Activity Type: Organized Research	
NSF Code:	A.04 : Civil - Engineering Notice Of Opportunity: Federal Solicitation	
Anticipated Award Type :	Grant 🔹	
Sponsor:		
Prime Sponsor:		
· · · · · · · · · · · · · · · · · · ·	Initial Period Grad Students	

- 4. Make a comment in Notepad stating change you made
- 5. Save IP record

f. Unlink, remove, an IP record from an Award

- i. Open IP Module
 - 1. Search for IP number
 - 2. Highlight the IP record
 - 3. Select Medusa to confirm the IP record is linked to the award



4. Close Medusa

5. Open IP record in 'New Entry' edit

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0 💷 📰 🗾] (5 H 🖉 🗄	1 🖉 🔊 🔍 🗖	Ø	
Tinstitution F	Proposal New E	ntry		
Proposal No.	Туре	Activity	Status	Lead Unit
18042766	Supplement	Other Sponsored Acti	Funded	17002103

- 6. Select File > Unlock Proposal
- 7. Highlight the Award number
- 8. Select Ok button

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Next								
Previous	oosal New Entry 10094769 Sequence 3							
Unlock Proposal	6 ing Info Investigators Key Person Cost	Sharing IDC						
Print Proposal Notice	sal No: 10094769 Seq No: 3	Award N						
Close	Award List for Proposal	×						
Save	The proposal '10094769' is funding following awards.							
Change Password	Award Number Award Sequence Prop Sequence Account Number	Cancel						
Current Locks		Select All						
Delegations	J Type :	, , , , , , , , , , , , , , , , , , ,						
Preferences	ponsor: 300870 🔍 NATIONAL INST	ITUTE ON DR						

- 9. Go to IP Proposal Tab
- 10. Highlight Award Number field
- 11. Select Delete
- 12. Save
- 13. Confirm that Status has changes to PENDING (*)

Institute Proposal New Entry 18032112 Sequence 3								
Proposal Mailing Info I	Investigators Key Pers	on Cost Sharing	IDC rates Special	Review Science O	Codes IP Review	Others		
Proposal No: 18032	2112 Seq No:	3 A	ward Number: 116503-0	01	Status: Pending	- 7		
Merged With:				10	13	ذر		
Intie: Epige	enetic Molecular Editing Technolo	ly for Cancer Targeted Dr	rug Delivery	~~~~		- All		

- (*) Email <u>coeus-help@jhu.edu</u> if Status does not change.
- 14. Enter Comment in Notepad
- 15. Open Medusa confirm IP no longer linked to award