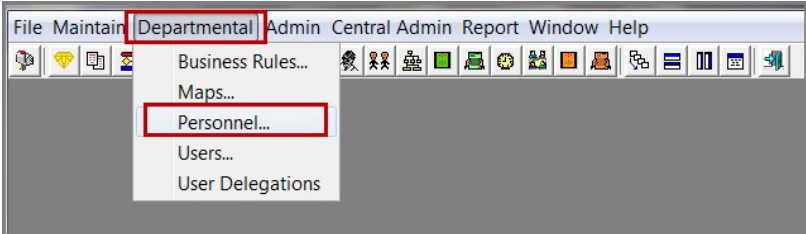
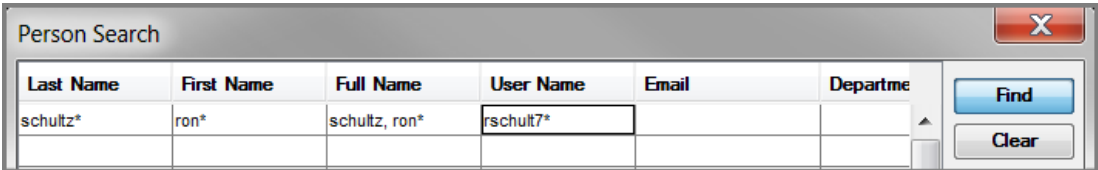


### A. Report Location

1. Select: *Departmental>Personnel* from Top Menu Bar or Select this Icon 



2. Enter: Investigator information [use only one of the formats shown]

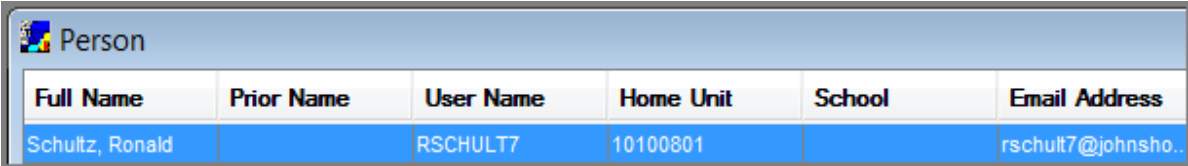


A 'Person Search' dialog box with a table for search criteria. The 'User Name' field is highlighted.

Last Name	First Name	Full Name	User Name	Email	Departme
schultz*	ron*	schultz, ron*	rschult7*		

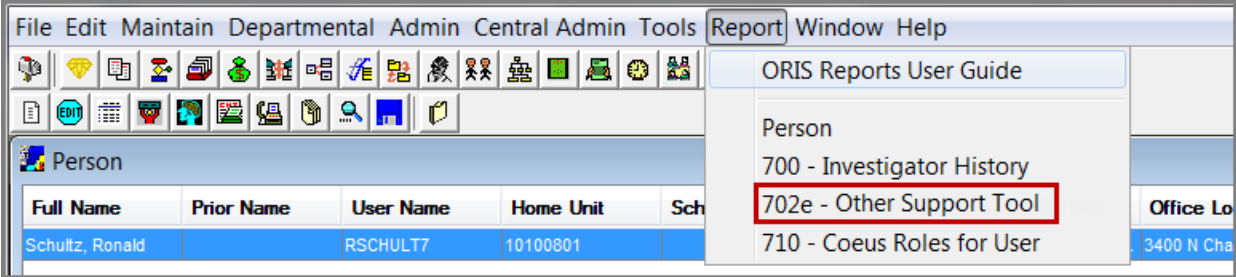
Buttons: Find, Clear

3. Highlight: name in Person list



Full Name	Prior Name	User Name	Home Unit	School	Email Address
Schultz, Ronald		RSCHULT7	10100801		rschult7@johnsho..

4. Select: Report Title from *Report>Menu*



- Change:** Other support as of – 9999 is a default date; change the date to the date you are running the report. Then select print.

## B. Generating & Manipulating Data

The tool will automatically generate an excel spreadsheet if you use Firefox or Chrome however if you use IE it will come out as a XML document.

You will have to save the XML document by selecting **File>Save as**. Once you've saved it, this will open up as an excel sheet- you will then need to re-save it as an excel workbook.

Below is a screenshot of an edited other support search. This example has been sorted to contain the items that are **pertinent** to compiling other support documents. You may choose to hide the additional columns to include relevant data only. A definition of the terms from the screenshot is provided below in Section C.

Part 1 lists funded and pending proposals. Part 2 lists funded proposals for which the target investigator is named on another PIs active grant.

702 - Part 1: TI is PI or Co-PI on [active] SAP GM Grant Master Data award and [pending] Coeus Inst. Proposals.													
TARGET_INV ESTIGATOR	PROPOSAL _STATUS	PROJECT_START _DATE	PROJECT_END_D ATE	AWARD_ACTION	DIRECT_COST	IP (Proposed ) EFFORT %	IP_PI	AWARD ID	TITLE	SPONSOR	PROPOSAL _TYPE	AWARD_TYP E	
Doe, John	Funded	01/10/2011	01/09/2016	No Cost Extension	0	2	Doe, John	1234-5	Phase 1B study	DO NOT USE - USE	New	Clinical Trial	
Doe, John	Funded	01/10/2011	01/09/2016	Supplement	20000	2	Doe, John	95963-01	Phase 1B study	DO NOT USE - USE	New	Clinical Trial	
Doe, John	Funded	03/01/2012	02/28/2016	Future Year Support	37500	1	Doe, John	R01CA90005	This is Project 1	CHILDRENS HOSPIT.	New	Subgrant	
Doe, John	Funded	05/11/2011	05/09/2018	No Cost Extension	0	1	Doe, John	89734-10	This is Project 2	CHILDRENS HEALTH	New	Clinical Trial	
Doe, John	Funded	07/01/2011	06/30/2016	Future Year Support	104762	52	Doe, John		Improving Child Welfare	AHRQ	New	Grant	
Doe, John	Funded	07/16/2010	11/29/2018	Supplement	17537	5	Doe, John	90038698	A Study of Cancer Cells	CHILDRENS HOSPIT.	New	Clinical Trial	
Doe, John	Funded	07/16/2010	11/29/2018	Supplement	32576	5	Doe, John	90038698	A Study of Cancer Cells	CHILDRENS HOSPIT.	New	Clinical Trial	
Doe, John	Funded	07/16/2010	11/29/2018	Supplement	7937	5	Doe, John	90038698	A Study of Cancer Cells	CHILDRENS HOSPIT.	New	Clinical Trial	
Doe, John	Funded	07/16/2010	11/29/2018	Supplement	10405	5	Doe, John	90038698	A Study of Cancer Cells	CHILDRENS HOSPIT.	New	Clinical Trial	
Doe, John	Funded	09/05/2014	07/31/2019	New Award	388549	5	Doe, John	AWG-15-6877	Study of Mouse RNA	EPIZYME INC	New	Clinical Trial	
Doe, John	Funded	10/01/2014	03/03/2018	New Award	134221	3	Doe, John	PF-2316-00	Phase II trial of ADHD medication	MEDIMMUNE LLC	New	Clinical Trial	
Doe, John	Funded	11/05/2012	10/08/2016	Supplement	234	1	Doe, John	12121212	Study of Bats in their habitat	JAZZ PHARMACEUTI	New	Clinical Trial	
Doe, John	Funded	11/12/2014	02/28/2019	Future Year Support	11905	5	Doe, John		This is Project 3	CHILDRENS HOSPIT.	Renewal	Subgrant	
Doe, John	Pending	04/01/2015	03/31/2017	NA	8468	2	Doe, Jane		A Study of Obesity in children	UNIV OF MARYLAND	Resubmission	Subgrant	
Doe, John	Pending	07/01/2014	06/30/2015	NA	66000	0	Doe, Jane		Study of Brain Development	CMDRP- DoD	New	Grant	
Doe, John	Pending	07/01/2014	06/30/2016	NA	8420	2	Doe, Jane		Side Effects of Neurosurgery	UNIV OF MARYLAND	New	Subgrant	
Doe, John	Pending	07/01/2015	06/30/2017	NA	61905	0	Doe, Jane		A Study of Caffeine Intake on the Brain	Foundation	New	Grant	
Doe, John	Pending	10/20/2014	10/19/2017	NA	173420	1	Doe, John		The importance of fiber	AMGEN INC	Task Order	Clinical Trial	
702 - Part 2: TI is named on another PIs [funded] Inst. Proposal and [active] GM Grant award.													
TARGET_INV ESTIGATOR	PROPOSAL _STATUS	PROJECT_START _DATE	PROJECT_END_D ATE	AWARD_ACTION	DIRECT_COST	IP (Proposed ) EFFORT %	PERSON_NAM E	AWARD_ID	TITLE	SPONSOR	PROPOSAL _TYPE	AWARD_TYP E	
Doe, John	Funded	07/10/2013	06/30/2018	Future Year Support	237084	0	NA	F32898888	Mentoring Fellowship	NCI	Renewal	Grant	
Doe, John	Funded	09/05/2014	07/31/2019	New Award	488549	5	NA	EP2-5676-12-002	Study of Mouse RNA	EPIZYME INC	New	Clinical Trial	

## C. Terms

<p><b>Target Investigator</b> Investigator for whom Other Support analysis is being performed. The person initially searched for in Coeus. Mentioned as TI in the two black bands of the report.</p>	<p><b>Proposal Status</b> 'Funded' – proposal is awarded and currently active in SAP. 'Pending' – proposal is pending and considered to be still under review by the sponsor (*). <b>(*Users should notify ORA if a Pending proposal will not be funded. ORA will update.</b></p>	<p><b>Project Start Date</b> Status 'Funded' - Project start date as shown in GM Grant of the funded award. Status 'Pending' – Project start date proposed in the Proposal submitted to sponsor. The initial IP date is shown if multiple proposals were submitted.</p>
<p><b>Project End Date</b> Status 'Funded' - Project end date as shown in GM Grant of funded award. Status 'Pending' – Project end date proposed in the Proposal submitted to sponsor. The initial IP date is shown if multiple proposals were submitted.</p>	<p><b>Award Action</b> Status 'Funded' - GM Grant&gt;AYB Award Action Column for the AYB line(s) (*) encompassing the User-Specified 'As Of' date, Parameter 2, provided in the report. (*Supplements awarded in the current period appear in separate lines in both AYB and this report. Status 'Pending' – Always 'N/A', not applicable to proposals records.</p>	<p><b>Direct Cost</b> Status 'Funded' – GM Grant&gt;AYB Direct dollar amount for the AYB line(s) (*) encompassing the User-Specified 'As Of' date, Parameter 2, provided in the report. (*Supplements awarded in the current period appear in separate lines in both AYB and this report. <b>Status 'Pending' – Direct dollar amount of the first year/period in the Proposal budget.</b></p>
<p><b>IP (Proposed) Effort %</b> <b>This is always the Effort proposed in the Original Institute Proposal (IP) record for the Target Investigator.</b></p>	<p><b>IP_PI /Person Name(*)</b> Part 1 – 'IP_PI' is the PI on the displayed record, both SAP Award and Coeus IP. Part 2 – 'Person Name' is the Target Investigator. (*This is the only column in which Part 1 and 2 have different headings/purposes. <b>This is the Institute Proposal (IP) PI.</b></p>	<p><b>Award PI</b> If Proposal Status is 'Funded', then Award PI is the PI on GM Grant. If Proposal Status 'Pending', no award has been made, so Award PI = NA.</p>
<p><b>Sponsor</b> Sponsor name assigned to sponsor by SSPS.</p>	<p><b>Proposal Type</b> If Status 'Funded' – from the IP Proposal Type. See below. If Status 'Pending' –from the original proposal submitted to sponsor.</p>	<p><b>Award Type</b> If Status 'Funded' – from GM Grant&gt;General Data Tab&gt;Award Type. If Status 'Pending' – from Anticipated Award Type on the original proposal submitted to sponsor.</p>

## D. Tips & Tricks

1. To make all of this information easier to view – you may wish create a Pivot table. To create the pivot table click anywhere in the excel document and go to **Insert>Select Pivot Table**. Excel will automatically detect the whole table as long as there aren't any blank rows in the worksheet. You can add the Pivot table to the existing worksheet however to make it cleaner select new worksheet.
2. This report is a great tool to reconcile proposal funding status and to update Coeus records for those applications that were not funded. Inform your Grants Associate (GA) in ORA if a proposal was not funded.

## **E. Helpful Hints**

### **NIH Other Support document:**

1. For active other support, faculty effort should never exceed 12 calendar months.
2. When preparing other support for Just-in-Time submissions, effort including new grant should not exceed 12 months. Be sure to address any overlap. Also include a statement if PI will reduce effort on a project to accommodate additional effort on pending grants.
3. Please ensure award ID's are listed (in particular with NIH Grants)

### **NIH Biosketch- Section C. Research Support**

1. Funding amount and Calendar months should not be listed
2. Only include ongoing and completed research. Pending grants belong in the other support document.
3. Confirm that ended grants have been transitioned to the completed research portion. If extensions have been approved, make sure the ongoing research section has been updated.