


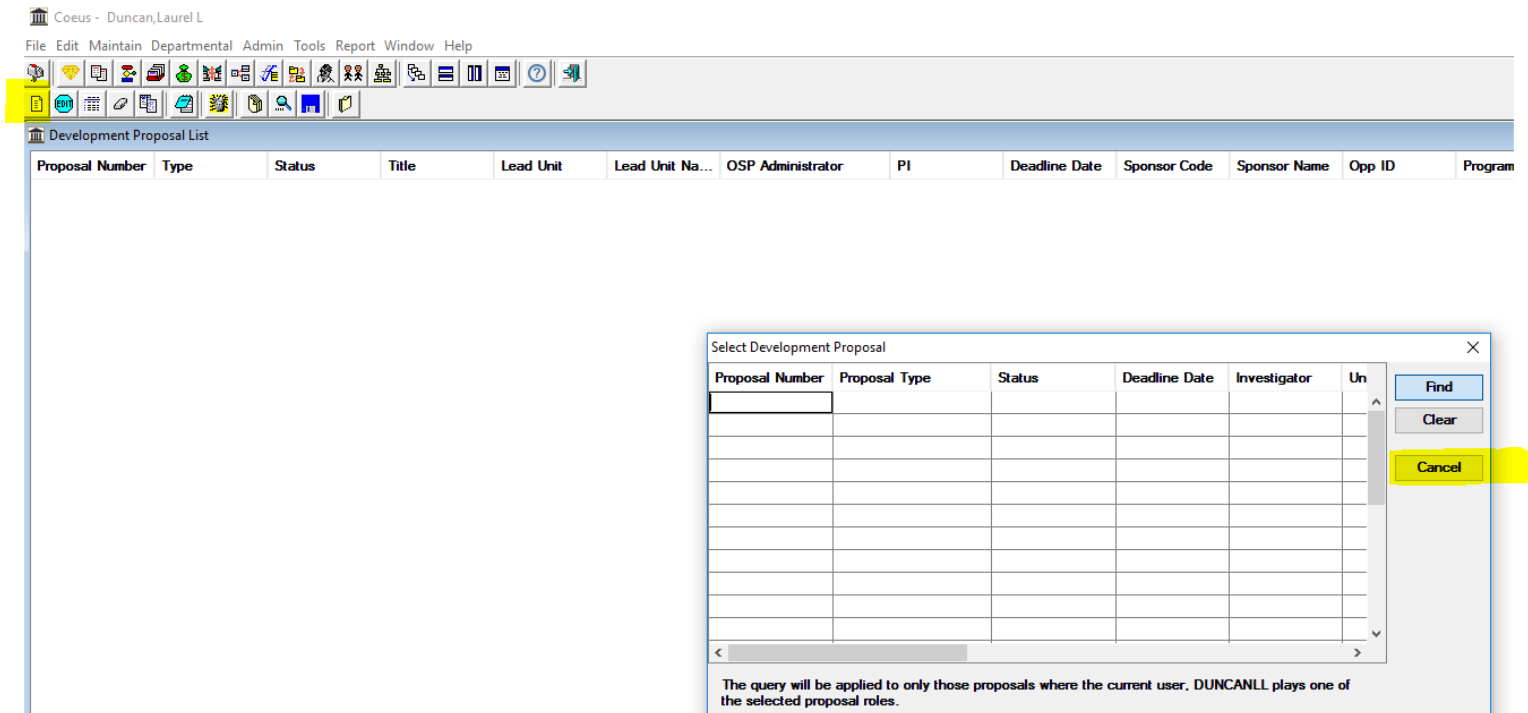
## IN A COEUS PROPOSAL

- All tabs** must be completed
- The **Questionnaire** must be completed
- A **Budget** must be completed (including a “*Budget Justification*” attached to the Narratives section)
- Don’t forget to “**certify**” the Investigator by logging the proposal into PEER

**TO CREATE NEW PROPOSAL**, CLICK the “Maintain Proposal Development”  button:



Then, click “**CANCEL**” from the “Select Development Proposal” window. After that window goes away, then click on the “Add A New Proposal” (looks like a piece of paper icon)  button to create a new Proposal.



# 1] Proposal Page/Tab

Title: **AWARD/PROJECT TITLE**

Start Date & End Date: **Full Proposal Period**

Proposal Type: **CONTINUATION, NEW, PRE-APPLICATION, RENEWAL, RESUBMISSION, REVISION**

Activity Type: **Research, Clinical Trial – Federal, Clinical Trial – Non Federal, Sponsored Training – Students, Public Service, Instruction, Sponsored Training - Faculty**

Anticipated Award Type: Depends on what you are submitting – See the **“COEUS-PEER Training”** PowerPoint.

**Examples:** Grant-Research, Grant – Training, Grant – Billing Agreement, Contract – Research, Contract – Research

Sponsor: **Depends on Proposal** (if Sponsor is not there, then see PP for how to request new sponsor; page 8 of PowerPoint)

Prime Sponsor: **Depends on Proposal** (if Sponsor is not there, then see PP for how to request new sponsor; page 8 of PowerPoint)

Notice of Opportunity: **select, as applicable**

**\*\*INCLUDE Grants.gov instructions on how to link proposal to Grants.gov**

Funding Opportunity Number (FOA): the Sponsor FOA is always pre-award and therefore will be found on the program announcement, grant opportunity, etc. (not all grants have this, but all *National Institute-type* grants will)

CFDA Number: on grant award information (During Proposal Development this is NEVER entered)

**Proposal Details - U0044065**

Proposal Organization Mailing Info Investigator Key Person Special Review Science Code Other

Proposal No: U0044065 Status: Submitted Proposal Hierarchy:  Narrative:  Budget:

Lead Unit: 128110:OHSE - Office of Health Sciences Education

Title: SBA, Rebecca Mohr, "Preventing Gastrointestinal Bleeding in Oral Anticoagulant Users", 4-28-118-0053

Start Date: 01-May-2016 End Date: 30-Jun-2016

Proposal Type: New Award No: NSF Code:

Activity Type: Research

Anticipated Award Type: Grant - Billing Agreement

Sponsor: 004001 Vanderbilt University Medical Center

Prime Sponsor: 000759 National Heart, Lung, and Blood Institute

Sponsor Proposal No: Original Proposal:

Program Title:

Notice Of Opportunity: Incoming Subcontract

Funding Opportunity Number: PA-16-087 CFDA Number: 93.839

Agency Program Code: Agency Div Code:

Agency Routing Identifier: Previous Grants.gov Tracking ID:

Last Update: 02-Dec-2016 03:45:00 PM :Action,Nicole J

## 2] Organization Tab

Proposal & Performing Organizations: **Vanderbilt University** (these are automatically populated; but verify just in case)

Proposal Details - U0044065

Proposal Organization Mailing Info Investigator Key Person Special Review Science Code Other

Type	Location
Proposal Organization	Vanderbilt University
Performing Organization	Vanderbilt University

Address/Contact

Harrison , Dorothy Janiece  
Vanderbilt University  
PMB 407749  
2301 Vanderbilt Place  
Nashville  
Tennessee 37240-7749, United States

Congressional District

Name
TN-005

If there is a subawardee or subawardees... then ....

Proposal Details - U0046910

Proposal Organization Mailing Info Investigator Key Person Special Review Science Code Other

Type	Location
Proposal Organization	Vanderbilt University
Performing Organization	Vanderbilt University
Outgoing Sub Organization	DANA-FARBER CANCER INSTITUTE, INC.
Outgoing Sub Organization	TEXAS A&M UNIVERSITY

Address/Contact

Harrison , Dorothy Janiece  
Vanderbilt University  
110 21st Ave. South, Suite 800  
Nashville  
Tennessee 37203-2417, United States

Congressional District

Name
TN-005

### 3] Mailing Info Tab

Deadline:

**Date:** your deadline

**Type:**  Postmark or,  Receipt... Postmark just means that the deadline is from the date you submit, versus “receipt” when they received it.

**Mail By:**  Department or  OSP/SPA (depending on your Sponsored Proposal Guidelines)

**Type:**  Paper (mail/email/fax);  Other S2S (other electronic system); or  S2S (system-to-system through COEUS) (depending on your Sponsored Proposal Guidelines)

Proposal Details - U0044065

Proposal Organization Mailing Info Investigator Key Person Special Review Science Code Other

**Deadline**

Date: 28-Nov-2016

Type:  Postmark  Receipt

**Mail By**



OSP  Department

**Type**

Paper (mail/email/fax)  Other S2S (other electronic system)  S2S (system-to-system) through Coeus

Mail Account:  No Of Copies:

Carrier Code:  Carrier Code Type:

Mailing Address:   

Mail Description:

## 4] Investigator Tab

Who is your PI? AND, THEIR PROJECT EFFORT.

The Investigator tab should only include the PI unless the Proposal is a **multi-PI project**. In this instance, both PI's are listed as main PI's.

\*\*Co-PI's are always listed on the Key Person tab.

Person Name	PI	Multi PI	Faculty	Effort %	Academic Effort %	Summer Effort %	Calendar Effort %	Certify
Mohr, Rebecca E	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25.0	.00	.00	.00	<input checked="" type="checkbox"/>

Lead Unit	Unit Number	Unit Name
<input checked="" type="checkbox"/>	128110	OHSE - Office of Health Sciences Education

You must “Certify” the Investigator by “logging” the Proposal into PEER (creating G LOG in PEER. The G Log also helps track the Proposal). On the **PEER website** (<https://peer.app.vanderbilt.edu/>), Under the **Administrator Portal Menu**, then **Grant, Proposals & Awards**, click on “**Log a Grant Application, Subaward or Contract Proposal**”.

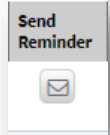
Item #	Date	PI	Type	Status
002115	12/06/16	Duncan	Billing Agreement	In Process by Dept
002102	12/06/16	Duncan	Billing Agreement	Central Office Review in Progress
002110	12/06/16	Duncan	Billing Agreement	Central Office Review in Progress

Date	Type	Status
12/01	Report a Technical Problem with PEER	Pending
11/18	Add or Modify an Employee Record in Coeus	Completed

If you wait until you've filled in all of the tabs on your COEUS proposal, then when you go to this page, then you'll enter your COEUS Proposal Development Number (begins with a "U") and it should prepopulate most of the fields for you. Just verify the information and hit submit.

**\*\*The administrator needs to look under COMPLIANCE and manually submit the request for the COI & PI Assurance.** Once you have initiated the G Log – go back into the G Log page, under the “COMPLIANCE” menu - click on **COI**, and then click on the reminder button (looks like an envelope)



To make sure the PI receives the email to complete the COI. The same is true for **PI Assurances**” Click on “PI Assurances” under the “COMPLIANCE” menu, and click on the envelope icon to send the PI a reminder email to complete this.

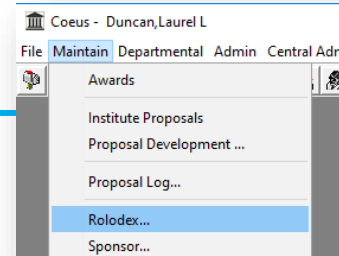
**As the Investigator, it is then their job to follow the links provided in the PEER-generated email that they receive to agree to the COI (Conflict of Interest) and Assurance statements.**

**Make sure Lead Unit is correct -  . You may have PI who is from a different department.**

**\*\*Reference: [COEUS & the feature Rolodex Change information](#)**


## 5] Key Person Tab

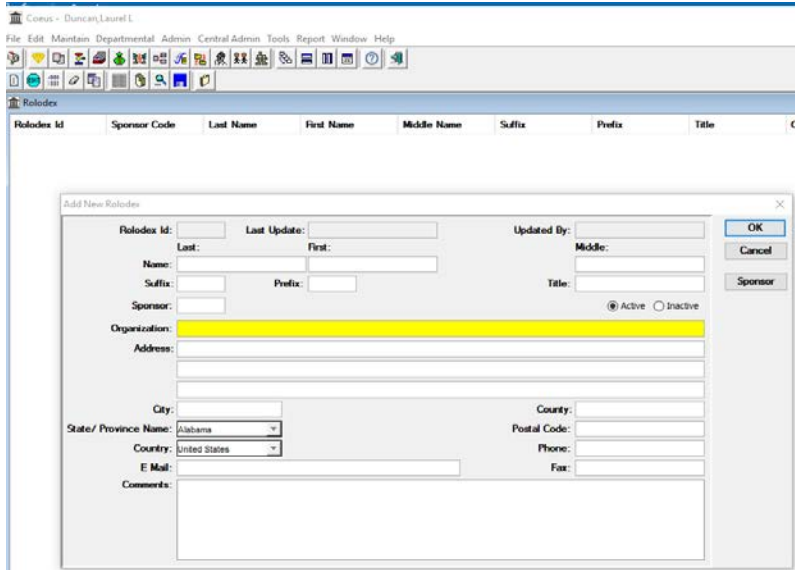
- Key Persons can be Co-Investigators, Consultants, etc. Be sure the **ROLE** is specified.
- If the person is not in Vanderbilt and can't be located under "Find non-employee", then provide instructions on how to add personnel via rolodex.



### To Add a Person to the Rolodex



- Click **Menu**: "Maintain" → Rolodex
- Search for KPs one more time before adding a new person – there are many duplicates in the system
  - **Search** by multiple items – Sponsor Name, Last Name, Organization, etc.
- If the person doesn't exist – cancel out of the search box by pressing "Cancel."
- With the Rolodex window active – Click Edit (  ) → "Add New Rolodex" window opens



- Fill out as much information that you can on the next screen. You must fill in the **Organization** Tab.
- When all information is complete Click Ok.
- Person now exists and can be added to the Proposal.

**6] Special Review Tab** – for **NEW**: “Pending”/ for **CONTINUATION**: you will have the Protocol # to provide.

- Animal
- Human
- Any special review that is applicable to the Proposal
  - Biosafety Hazard
  - NIH Genomic Data Sharing Policy
  - Recombinant DNA


**7] Science Code Tab**

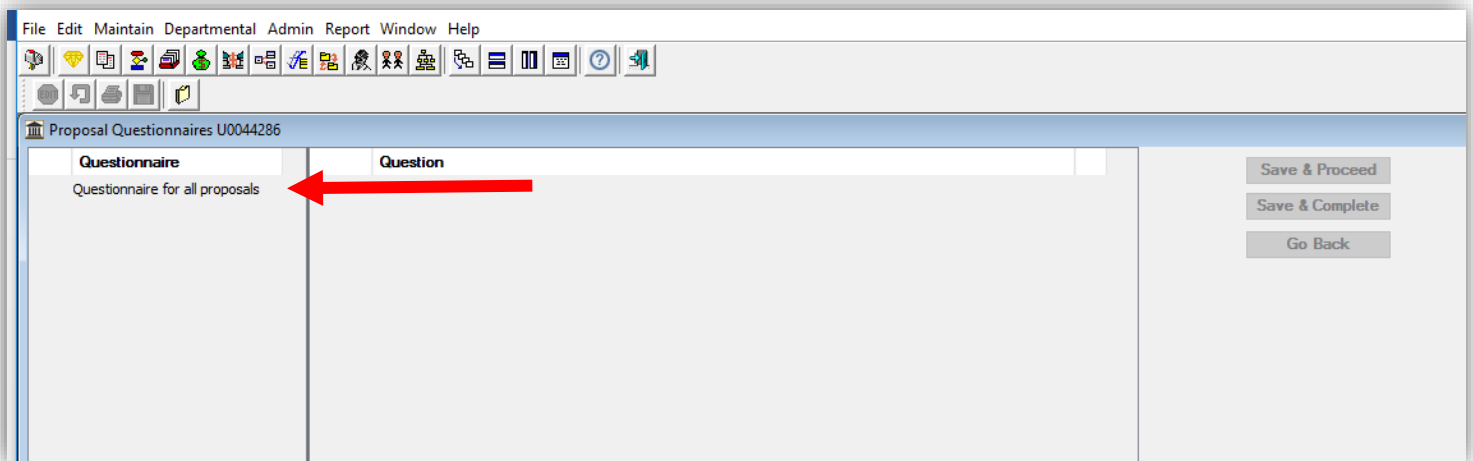
-nothing for this tab

**8] Other Tab**

-For NASA Proposals, it is required to enter the PI’s NASA User Name

**#9-11 are not Tabs, but the next STEPS in the Proposal**

**9] Questionnaire**  Click on “Edit”, then “Questionnaire” (or, there is a button for the Questionnaire looks like an outline of a person with a ?) and this opens -



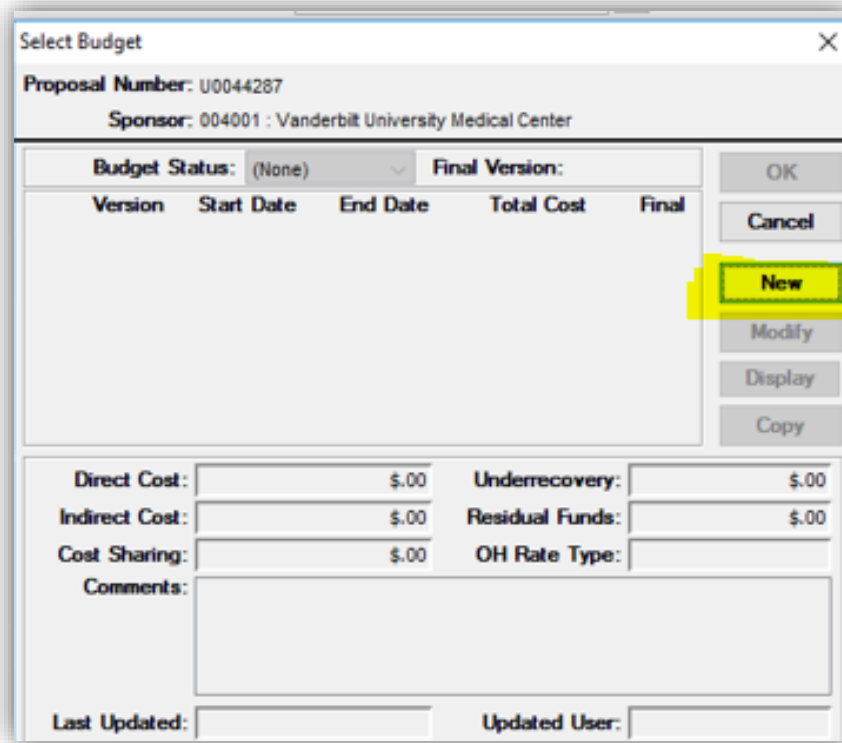
Double click on “Questionnaires for all proposals”

-Based on your Proposal, answer the questions.



## 10] Proposal Budget

Click on “Edit”, then “Budget” (or, there is a button for the Budget looks like a yellow money bag).



Select Budget

Proposal Number: U0044287

Sponsor: 004001 : Vanderbilt University Medical Center

Budget Status: (None) Final Version:

Version	Start Date	End Date	Total Cost	Final

Buttons: OK, Cancel, **New**, Modify, Display, Copy

Direct Cost: \$ .00 Underrecovery: \$ .00

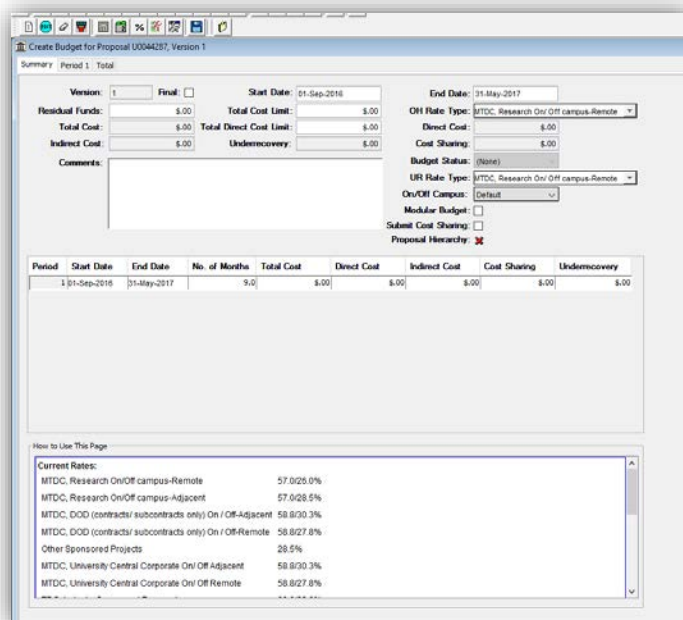
Indirect Cost: \$ .00 Residual Funds: \$ .00

Cost Sharing: \$ .00 OH Rate Type:

Comments:

Last Updated: Updated User:

Click on the **“NEW”** button. This window opens:



Create Budget for Proposal U0044287, Version 1

Summary Period 1 Total

Version: 1 Final:  Start Date: 01-Sep-2016 End Date: 31-May-2017

Residual Funds: \$ .00 Total Cost Limit: \$ .00 OH Rate Type: MTDC, Research On/Off campus-Remote

Total Cost: \$ .00 Total Direct Cost Limit: \$ .00 Direct Cost: \$ .00

Indirect Cost: \$ .00 Underrecovery: \$ .00 Cost Sharing: \$ .00

Comments:

Budget Status: (None)

UR Rate Type: MTDC, Research On/Off campus-Remote

On/Off Campus: Default

Modular Budget:

Submit Cost Sharing:

Proposal Hierarchy:

Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Sep-2016	31-May-2017	9.0	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00

How to Use This Page

Current Rates:

MTDC, Research On/Off campus-Remote	57.025.0%
MTDC, Research On/Off campus-Adjacent	57.028.5%
MTDC, DOD (contracts/ subcontracts only) On / Off-Adjacent	58.820.3%
MTDC, DOD (contracts/ subcontracts only) On / Off-Remote	58.827.8%
Other Sponsored Projects	28.5%
MTDC, University Central Corporate On/ Off Adjacent	58.820.3%
MTDC, University Central Corporate On/ Off Remote	58.827.8%

Version: 1 Final:  Start Date: 01-Sep-2016 End Date: 31-May-2017

Residual Funds: \$0.00 Total Cost Limit: \$0.00 OH Rate Type: MTDC, Research On/ Off campus-Remote

Total Cost: \$8,625.00 Total Direct Cost Limit: \$0.00 Direct Cost: \$8,625.00

Indirect Cost: \$0.00 Underrecovery: \$0.00 Cost Sharing: \$0.00

Budget Status: Incomplete

UR Rate Type: MTDC, Research On/ Off campus-Remote

On/Off Campus: Default

Modular Budget:

Submit Cost Sharing:

Proposal Hierarchy: ✖

Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Sep-2016	31-Dec-2016	4.0	\$8,625.00	\$8,625.00	\$0.00	\$0.00	\$0.00
2			0.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Version: 1 Final:  Start Date: 01-Sep-2016 End Date: 31-May-2017

Residual Funds: \$0.00 Total Cost Limit: \$0.00 OH Rate Type: MTDC, Research On/ Off campus-Remote

Total Cost: \$17,250.00 Total Direct Cost Limit: \$0.00 Direct Cost: \$17,250.00

Indirect Cost: \$0.00 Underrecovery: \$0.00 Cost Sharing: \$0.00

Budget Status: Complete

UR Rate Type: MTDC, Research On/ Off campus-Remote

On/Off Campus: Default

Modular Budget:

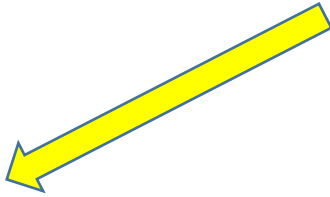
Submit Cost Sharing:


Proposal Hierarchy: ✖

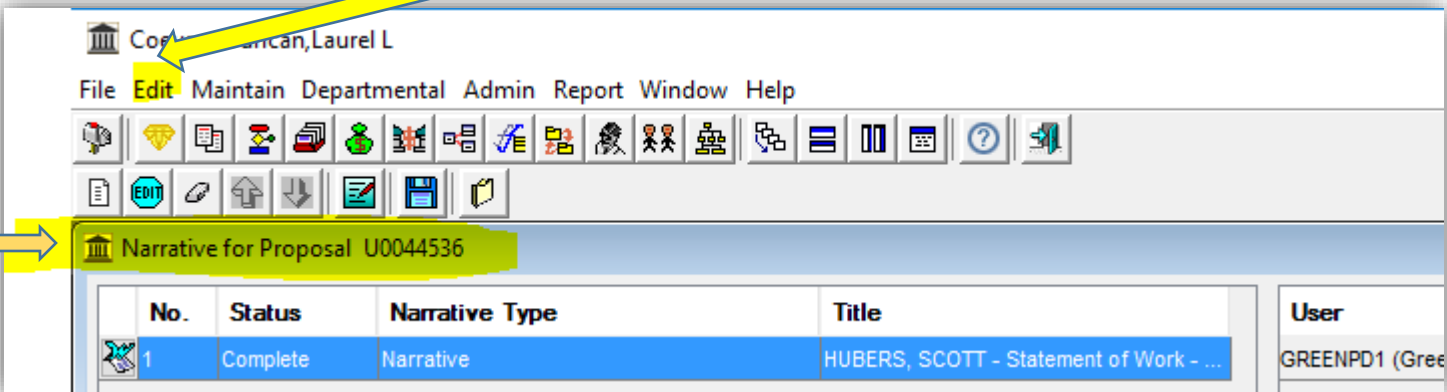
Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Sep-2016	31-Dec-2016	4.0	\$8,625.00	\$8,625.00	\$0.00	\$0.00	\$0.00
2	01-Jan-2017	31-May-2017	5.0	\$8,625.00	\$8,625.00	\$0.00	\$0.00	\$0.00

**Make sure to save.**

**11] Narratives:** One of the last things that you need to do in order to be ready to submit your Proposal is attach the documents necessary for your Proposal. You will access the “Narrative” menu option under “Edit”.



Once you are in the *Narrative for Proposal U0044XXX* window, then you will go to the “Edit” menu option, where there is an “Add” option. Or, you can click on the left-most icon that looks like a piece of paper (  , aka, “Add Module”)



No.	Status	Narrative Type	Title	User
1	Complete	Narrative	HUBERS, SCOTT - Statement of Work - ...	GREENPD1 (Gree

**Items that you MUST include for SPA Administrative review**

- Abstract/Scope of Work
- Detailed Budget (F&A/ Fringe Rates, Effort)
- Budget Justification (compared to Budget for accuracy)

**Other Items**

- Sponsor guidelines – Terms & Conditions
- Special Review/Compliance issues - IACUC, IRB, etc.
- Facilities & Resources
- Additional items, as applies

**If Outgoing Subaward(s) is (are) included in the Proposal, then SPA must have:**

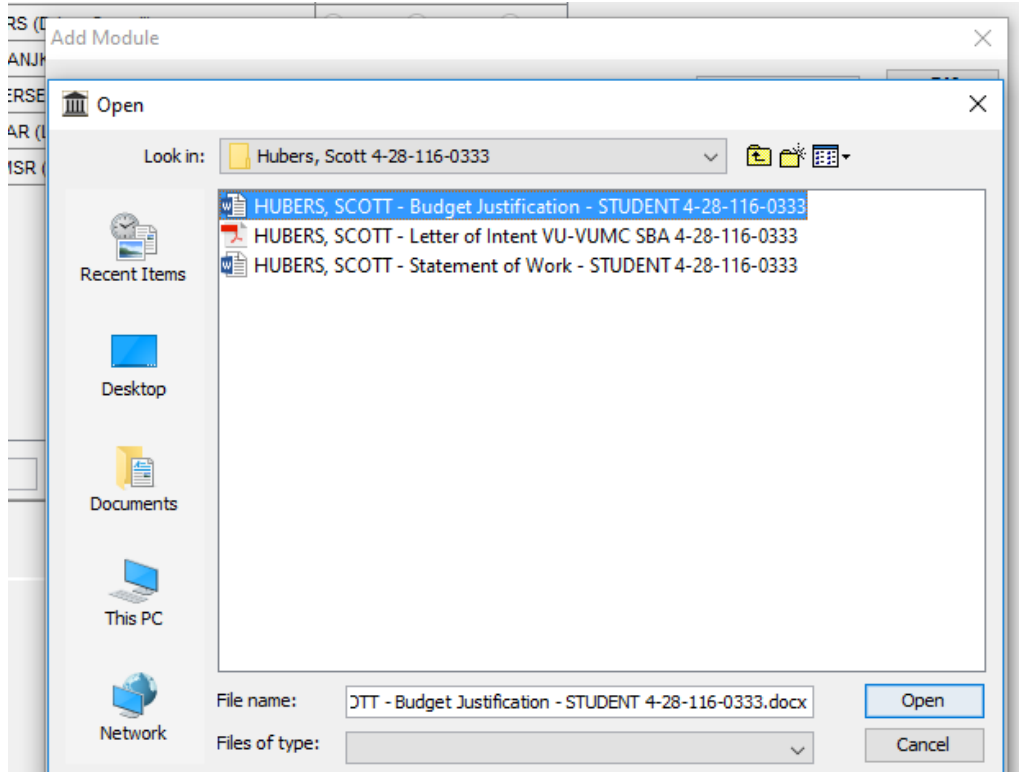
- FINAL Subrecipient Budget
- FINAL Subrecipient Budget Justification
- FINAL Subrecipient SOW
- *Subrecipient Statement of Collaborative Intent (SSCI)* form – completed & signed

For each document, you will use the “Add Module” button or “Edit” → “Add” menu option. The window you will see when you “Add Module” -

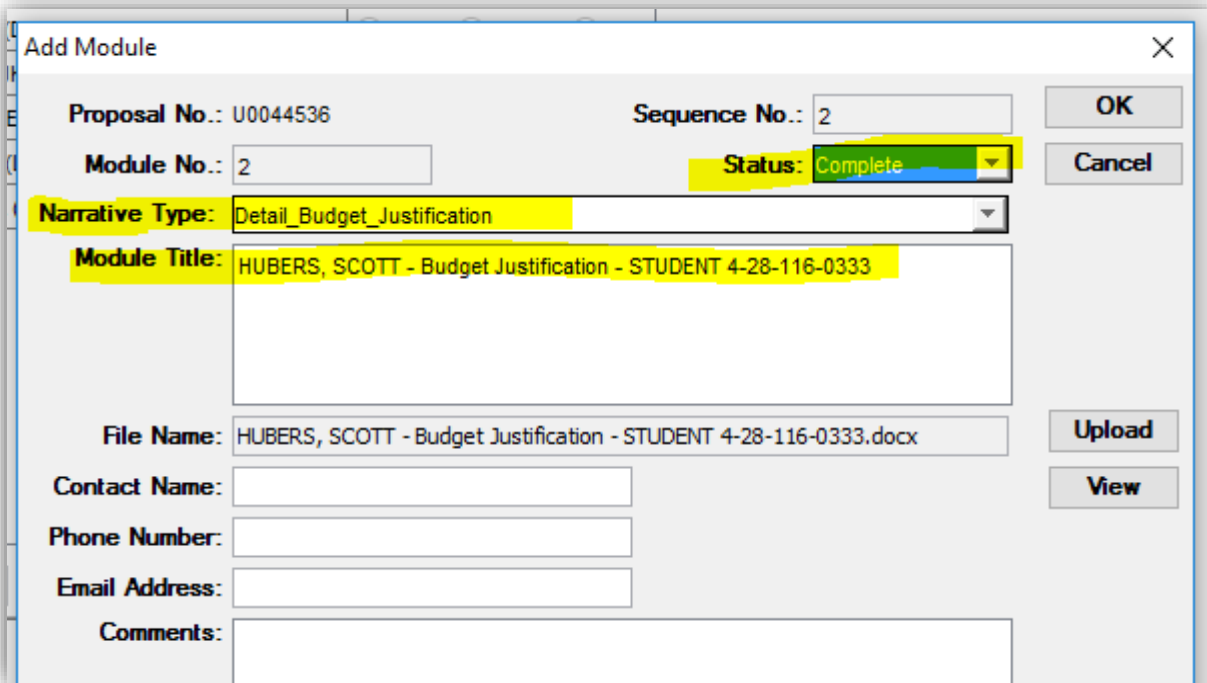
The screenshot shows a dialog box titled "Add Module" with the following fields and controls:

- Proposal No.: U0044536
- Sequence No.: 2
- Module No.: 2
- Status: incomplete
- Narrative Type: Narrative
- Module Title: (empty text box)
- File Name: (empty text box)
- Buttons: OK, Cancel, Upload

Use the “Upload” button to attach each document. When you do, you will see this:

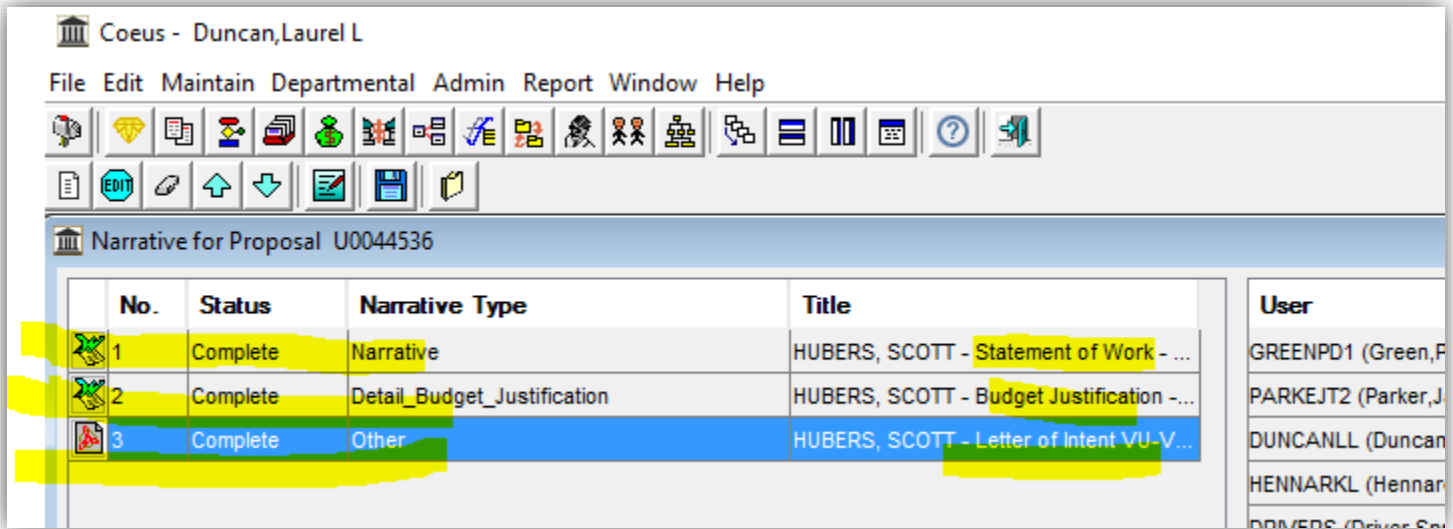


You will change the “Status” box to “Complete” when you are finished.

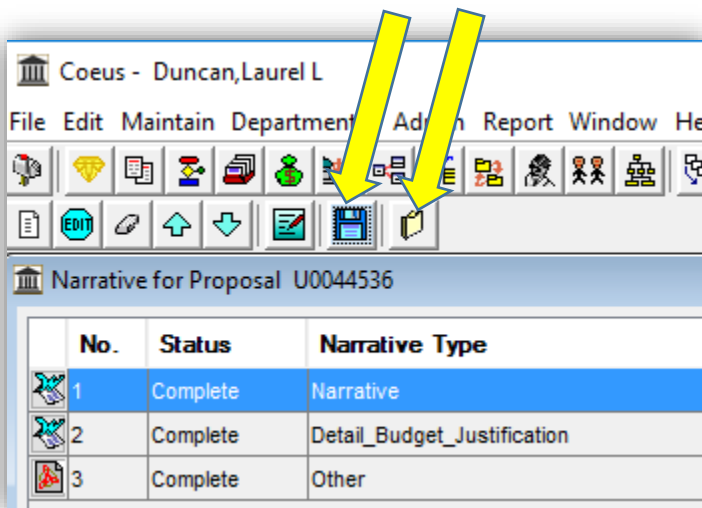


Save.

Double-check all documents are correctly labeled and set to complete:



**Then, save and exit from the window.**




\*\*\*Don't forget that you need to have logged the Proposal into PEER, which is the "Certify" portion in the *Investigator* tab. (Instructions for doing this are found on Page 6, where it states: **You must "Certify" the Investigator by "logging" the Proposal into PEER of this document**) You'll click the "Certify" button and answer that you've sent the request to PEER, say yes, then there will be a green check under the "Certify" column.

**Save.**

Click on the ACTION menu item, **FIRST**: click on “Validation Check” to make sure you have completed everything, and if all is a-okay. There may be warnings about ERA usernames being missing or it might state, “You’ve not certified”, or something is not right with the budget... Fix what you can, or call SPA if you cannot figure it out for help.

**\*\* There is a separate validation check for the budget piece only you can perform as well. Also, if Grants.gov you can go under Grants.gov and perform a validate check for your narratives, etc. too.**

- Click on the moneybag icon for BUDGET  which opens the “Select Budget” window
- Click on “DISPLAY” which takes you to the “DISPLAY BUDGET FOR PROPOSAL U00XXXXX”
- Click on “ACTION” => “Validation Checks ” -- this action only checks the budget
- Message: All COEUS Validation Rules were passed successfully” or WARNINGS w/ “XYZ is wrong, missing”
- Depending on the message you can proceed

Then you can **SECOND**: “Submit for Approval”. You submit, then it is goes to the next person in line for approval [there may be many approvals needed depending on what PIs or department(s) are involved], last it will go to SPA and they will review & approve. Once all has been approved, depending on the Proposal/Agency. Next steps will vary [It’s important to check your Routing Map to make sure it actually gets to SPA. “Action”, “Show Routing”]. See your guidelines.

