

CONCEPT:

The Proposal Development module in Coeus has been designed to allow departmental administrators and investigators to develop full proposals from the desktop, create budgets using University and/or Department approved rates, electronically route and approve proposals, and electronically submit proposals to Grants.gov.

Work on the proposal can be distributed by function (budget, narratives, and approvals) and managed through use of system roles; proposal templates can be created and copied; and Grants.gov and other sponsor / institution forms are automatically populated and generated by Coeus.

The use of Coeus Proposal Development supports Brown’s efforts to comply with the federal mandate that requires federal applications be submitted through one electronic portal – Grants.gov while improving the uniformity, consistency, and productivity of proposal preparation.

The Proposal Development module in Coeus has been designed to allow Departmental Administrators and Investigators to perform the following functions:

- Develop complete proposals from the desktop
- Create budgets that incorporate automated calculations of specific cost elements using the Institution's / Department's Approved rates
- Upload sponsor required attachments and narratives
- Route the proposal electronically for internal reviews and approvals
- Electronic system-to-system to Grants.gov

Collaborative work on the proposal is distributed by function (i.e. budget, narratives, and certifications) and managed through use of system roles.

TWO INTERFACES OF COEUS:

Coeus has two interfaces for users to enter or view data into a single database.

- **Coeus Premium –**
 Full featured application which allows users to prepare and view proposal funding applications and then route the completed applications for internal approval. In addition, it has full functionality to complete special requirements of a proposal and submit the proposal to Grants.gov.
- **Coeus Lite –**
 Web-based version of Coeus which allows users to prepare and view proposal funding applications and then route the completed applications for internal approval.

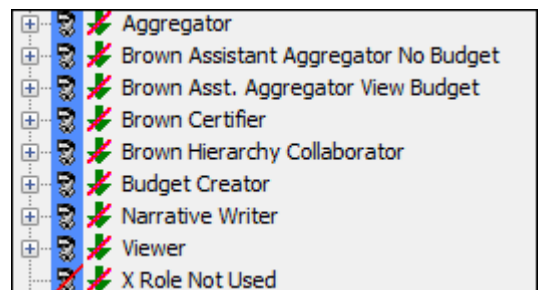
PROPOSAL ROLES:

Proposal Roles are assigned at the departmental level. These assigned role(s) define the users’ rights to the proposals within that department. In addition, Proposal Roles can be assigned to a specific proposal. The rights within each role are one or any combination of the following:

For details about the functions that each Role can perform, please see – **Department Roles and Rights** Document located on the Coeus Webpage.

Coeus Proposal Roles that can be assigned to a user are:

- Proposal Creator
- Aggregator
- Brown Assistant Aggregator No Budget
- Brown Assistant Aggregator View Budget
- Brown Certifier
- Brown Hierarchy Collaborator
- Budget Creator
- Narrative Writer
- Viewer
- Approvers (assigned by business rules / maps)



COEUS PROPOSAL DEVELOPMENT PROCESS:

The Aggregator / Proposal Creator creates a proposal shell by entering the basic details of the proposed project, similar to what is found on the OSP Proposal Summary and Approval Form (PSAF). Once the required Proposal Detail fields are entered and the record is saved, collaborative work on the proposal can be distributed to investigators and / or administrators to complete the required proposal components necessary for submission.

The are 5 main components to the Proposal Development process are:

1. **Proposal Details Entry**
2. **Budget Creation**
3. **Narratives and Attachments / Abstracts**
4. **Certifications**
5. **Routing / Approvals / Submission**

1. PROPOSAL DETAILS ENTRY:

Proposal Details section is where the general information about the proposed project is entered. The proposal attributed entered in Coeus is the same data that is on the retired Proposal Summary Approval Form (PSAF). The information entered in the Proposal Details section is used to populate the face pages of the Grants.gov forms for electronic system-2-system submissions.

Some of the Key Proposal Details that are captured are as follows:

- General Information or basic attributes of the proposal.
- Brown University contact information and other attributes; e.g. Congressional District, DUNS #, etc.
- Deadline date and for the proposal.
- Principal Investigator and Co-Investigators.
- Key Individuals, who have responsibility for the design, conduct, or reporting of research.
- Answers to the University's Institutional and Regulatory questions located in the Yes/No Question section.
- Departmental keywords used to categorize proposals.
- Brown University's custom fields; e.g. information specific to proposal that is captured for internal reporting purposes.

2. BUDGET CREATION:

The Budget Creation section allows you create & modify **Detailed** or **Modular** Budgets. Multiple versions of the budget can be created for any given proposal, but only one is marked "Final" for submission.

- The Budget Creation section stores all Employee Benefit, Inflation and F&A rates and applies these rates to applicable cost elements / budget line items. Coeus automatically calculates Direct and Indirect Cost totals for each budget period and fringe benefits for all personnel categories.
- In addition, full budgets for all proposal periods subsequent to the initial budget period are automatically generated using predefined inflation rates.

3. NARRATIVES AND ATTACHMENTS / ABSTRACTS:

The Proposal Narrative/Attachment section allows for uploading (attachment of) PDF files for sponsor required documents (e.g. Science Narratives, Bibliographies, Facilities, etc.) to the proposal record.

Personnel documents, such as Bio Sketches and Current and Pending Support, are also attached to the record. All narratives & attachments can either be submitted electronically with the Grants.gov package or printed for manual submissions.

Brown's required Project Summary abstract will be entered in the Layman's Abstract section in the Proposal Development module.

4. CERTIFICATIONS:

The Certifications process includes:

* ***Certifying Investigators*** - Investigators answer a series of questions, and an electronic certificate in Coeus is printed, signed by the investigators, and forwarded to OSP for the institutional proposal file.

* ***Completing the Yes/No Questions*** - Investigators and/or Department Administrators answer a series of questions that address University specific and Sponsor/ Grants.gov compliance issues.

5. ROUTING / APPROVALS / SUBMISSION:

Routing and Approving the proposal are the final stages of the Proposal development process before the proposal is submitted to the Sponsor.

The Routing & Approvals process includes:

* ***Validating the Proposal*** - The Coeus validation check will alert you if you have missed or failed to complete required elements in your proposal based on institutional and Grants.gov requirements.

* ***Submit the Proposal for Approval routing*** - Coeus routing and business rules simulate the Department's and University's business practices for the proposal review approval process.

Submission - *Once the proposal has successfully reached final approval stage the proposal is submitted to the Sponsor.*