



In this topic, you will learn how to create and submit a Revised Budget for approval routing. The following directions define the process and identify specific data that is needed in the proposal record for Revised Budgets.

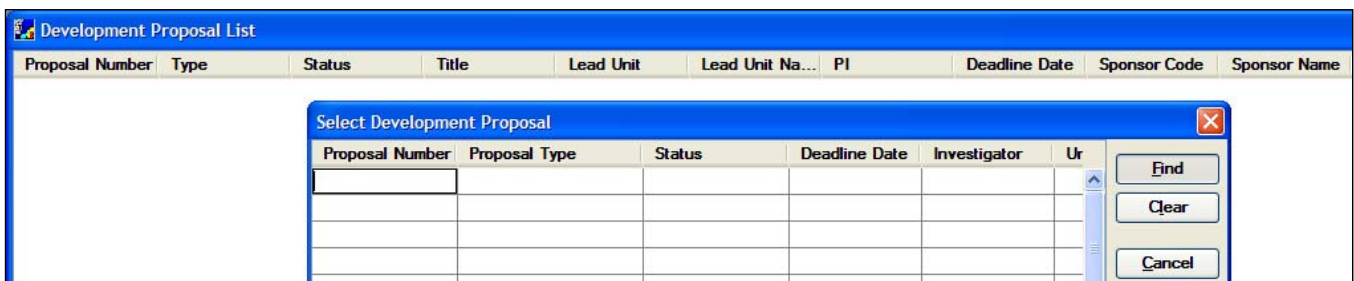
Completing the Development Proposal record for a Revised Budget is streamlined by making a copy of the original Development Proposal record submitted.

■ **SEARCH FOR THE ORIGINAL DEVELOPMENT PROPOSAL RECORD:**

To begin creating a Revised Budget in Coeus, first search for the Development Proposal record that was submitted and for which you have been requested to complete a revised budget.

In the Select Development Proposal Window, you can search for the original development proposal record by numerous criteria, such as *Title, PI, or Sponsor*.


1. Enter your search criteria in the appropriate fields and click the [**FIND**] button.

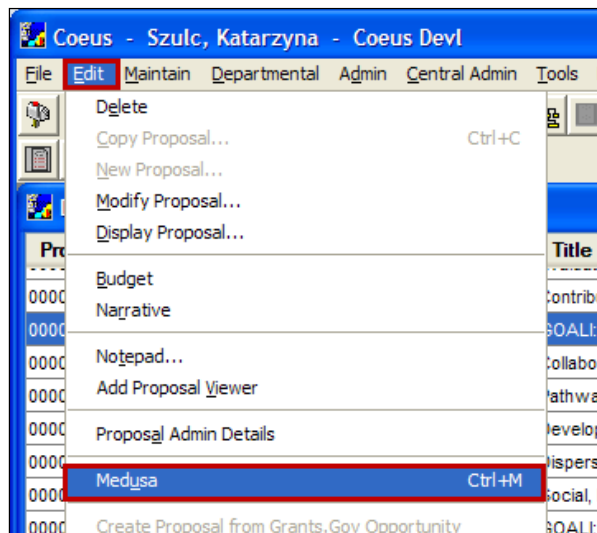


The proposal(s) that match your search criteria will be listed in the Development Proposal List Window.

■ **GET THE INSTITUTE PROPOSAL RECORD NUMBER FROM THE ORIGINAL SUBMISSION:**

Before you create the revised proposal, you will need to get the **Institute Proposal record number** of the original submission from the Medusa Window of that proposal.

1. Select the proposal you need to obtain the Institute Proposal record number for and click the **Edit** → **Medusa** from the menu bar - .




The Medusa Window will open. On the left hand side under the View box you should see an icon with two pieces of paper, the number to the right of that icon is the Institute Proposal number.



2. To close out of the Medusa Window, click the **File** → **Close** from the menu bar.

■ **MAKE A COPY OF THE ORIGINAL DEVELOPMENT PROPOSAL RECORD:**

Completing the Development Proposal record for a Revised Budget is streamlined by making a copy of the original Development Proposal record submitted.

1. To make a copy of the original Development Proposal record, select it in the Development Proposal List window and click **Edit** → **Copy Proposal** from the menu drop-down - .

The Select Copy Options Window opens.

Coeus copies the Proposal Details, the Grants.gov Connection, Modular Budget Check Box if selected in the copied Budget and it allows you to select whether or not you want to copy the following items:

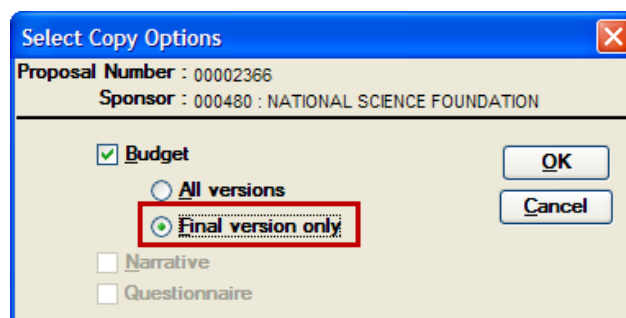
- Budget (All Versions or Final Version Only)
- Narrative
- (Note: The answers to the NIH – Additional Investigator(s) Questionnaire, the NSF – Additional Investigator(s) Questionnaire, Cost Sharing-Direct Cost, and Cost Sharing-Indirect Cost DO NOT copy over)



When you want to copy a proposal, the option of copying the Narrative and the Budget is dependent on your Proposal roles & rights. If the **Budget** or **Narrative** copy options are grayed out, that means one of the following:

1. You are not an Aggregator on this proposal and have no rights to copy the budget / narrative.
  2. There were neither narratives nor a budget in the proposal you copied.
2. Under the checked Budget box, click the **Final version only** radio option to make a copy of the proposal with the final budget version included.

**Do NOT check the Narrative box; the original Narratives are not needed for a Revised Budget submission.**



- Click the **[OK]** button to generate the copy.

The Development Proposal List Window now shows two proposals; the original proposal and the newly created proposal with the selected data from the original proposal copied in the new proposal.



The newly created proposal made by copying will typically appear as the last proposal in the Development Proposal List Window unless you have your proposals sorted in another fashion.

If you have trouble locating the newly copied proposal, sort the **Proposal Number** column in descending order (click 3 times on that column heading) to bring the highest Proposal Number to the top of the list.

- Select the newly created proposal and click **Edit** → **Modify Proposal** from the menu drop-down -  to open the proposal in Edit Mode.

**■ UPDATE THE NEWLY CREATED DEVELOPMENT PROPOSAL RECORD:**

The next step is to verify and modify data in the proposal development record pertaining to the Revised Budget. The following instructions identify specific data that is needed in the proposal record for Revised Budget proposals. Please refer to the Training Guides for detailed instruction on how to complete each section, the guides can be found on the Coeus Webpage.

**Modifying the Proposal Details Section:**

- In the Proposal Tab, enter/modify the required information. Follow regular instructions for completing the fields.
  - Start** and **End Date** fields – adjust if necessary
  - Proposal Type** field – select **Resubmission**
  - Original Proposal** field - Enter the Institute Proposal number for the original submission. [To link to the Institute Proposal record, click the Search (magnifying glass) icon to the right of the field and search by the *Title, PI, and Sponsor*]




It is very important to set the Proposal Type to Resubmission for the Revised Budget to route appropriately.


2. In the Organization Tab follow the regular instructions for completing the fields.
3. In the Mailing Info Tab enter the **Deadline** and the **Deadline Type** for the Revised Budget.
4. In the Investigator Tab if any Investigator effort is being changed as a result of the Revised Budget, adjust the **Effort %** field accordingly.

Person Name	PI	Multi PI	Faculty	Effort %	Academic Year Effort %	Summer Year Effort %	Calendar Year Effort %	Certify
Szulc, Justyna	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	50.00	.00	.00	.00	<input checked="" type="checkbox"/>

5. In the Key Person Tab follow the regular instructions for completing the fields.
6. In the Special Review Tab follow the regular instructions for completing the fields.
7. In the Other Tab follow the regular instructions for completing the fields.
8. In the **YNQ Section** of the proposal record, you must indicate in question **0B19** that the submission is a Revised Budget.


Code	Question	Answer
0B18	If applicable, are proposed salaries over the cap? If Yes, include NIH Salary Cap Worksheet with submission.	<input type="radio"/> Yes <input checked="" type="radio"/> No
0B19	Is this submission a Revised Budget?	<input checked="" type="radio"/> Yes <input type="radio"/> No

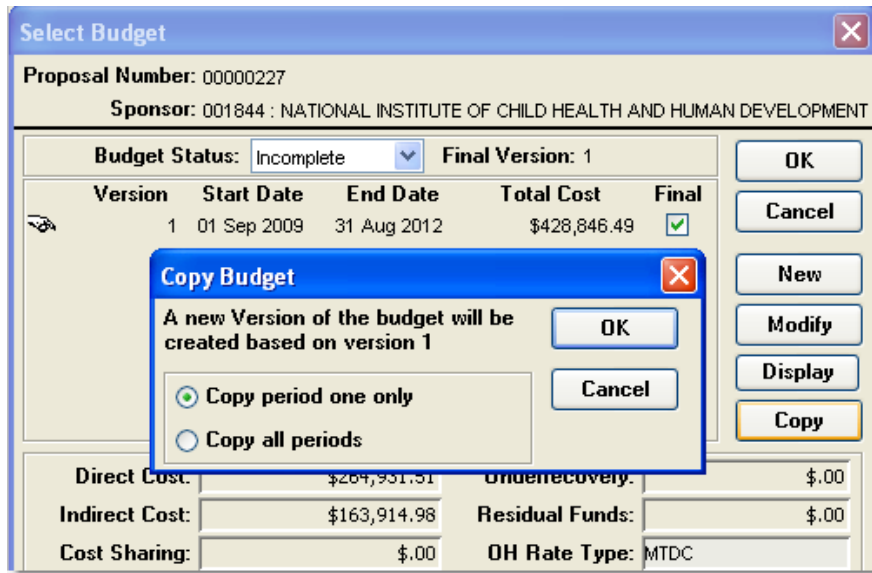
 After copying the original proposal, this question will be populated with “NO”, be sure to change this to “**YES**” for all Revised Budget proposals.

9. Select **File** → **Save** from the menu bar -  to save your changes.

### ■ REVISE THE BUDGET:

Enter the Budget section to revise your budget. Please refer to the Training Guide – C02 for detailed instruction on how to complete the **Proposal Budget Section**, located on the Coeus Webpage.

 If you choose, you can make a copy of the original proposal and only include Period 1 in order to have the ability to generate the out years for the revised Budget.



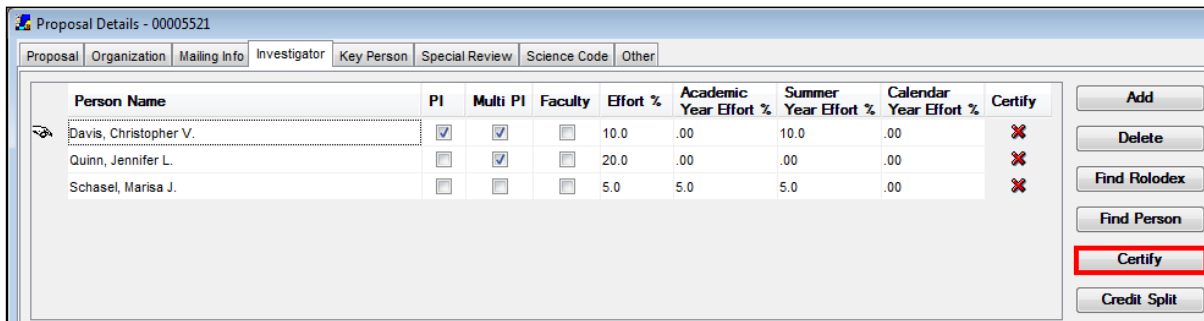
■ **COMPLETE THE NARRATIVE SECTION:**

Upload any necessary documents needed to support the Revised Budget in the **Narrative for Proposal Section.** \

■ **COMPLETE THE CERTIFICATIONS FOR ALL INVESTIGATORS:**

The PI and Co-PIs do NOT need to certify the proposal for Revised Budget submissions. To complete this step:

1. Navigate to the Investigator Tab and select the **[CERTIFY]** button for the PI.



2. Answer all the certification questions as "N/A."

**Investigator Proposal Certification**

[Previous](#) [Modify](#) [Start Over](#)

1) Have you filed the annual Assurance of Compliance form and if necessary, a Reporting form as required by the University's Conflict of Interest Policy for Officers of Instruction and Research? [More](#)  
 Yes  No  N/A

2) Do you have a significant financial interest related to your professional expertise or institutional responsibilities? [More](#)  
 Yes  No  N/A

3) Do you have a significant financial interest related to this research project? [More](#)  
 Yes  No  N/A

4) Do you agree if an award is made as a result of this application, to accept responsibility for the scientific and technical conduct of this project, to provide the required technical reports, and to administer the project in accordance with the policies of the sponsor and the University? [More](#)  
 Yes  No  N/A

5) Are you or anyone proposed to work on this project, to the best of their knowledge, excluded from participation in federally funded activities as a result of government-wide suspension or debarment? [More](#)  
 Yes  No  N/A

6) I certify that the information contained in this proposal application is true, complete, and accurate to the best of my knowledge and belief and that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. [More](#)  
 Yes  No  N/A

7) Have lobbying activities been conducted regarding this proposal? [More](#)  
 Yes  No  N/A

3. Repeat these steps for all investigators in that tab.

**SUBMIT THE PROPOSAL FOR APPROVAL ROUTING:**

The Approval Routing of Revised Budgets will bypass the Department Chair sign-off since they are not needed for this type of submission.