# Coeus Proposal Development Guide

Last Updated: May 9, 2018

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BUG: Proposal routed by aggregator

Closing and editing proposals

Closing the proposal when you’re not ready to submit

Editing an existing proposal

Finding the proposal when you don’t know the proposal number

Copying an Existing Proposal (same lead unit)

Copying an Existing Proposal (from one lead unit to a different lead unit)

Editing a proposal that has been rejected or recalled

Unlocking your locked proposal

Deleting proposals

Who can delete? What kind of proposals can be deleted?

How to delete

What if you get “null is using proposal” when you try to delete a proposal?

What if you want to delete a proposal hierarchy?

The University Research Board (URB) Process

Additional Functionality

Adding a Name to the Rolodex

Notes on what happens when a user moves from one dept to another dept

Adding Coeus Roles/Adding Coeus rights: Granting View/Update Access to Your Proposal

Granting access to person who works in your dept

Granting access to person who works in another dept

What do the different roles mean?

Email notification

Proposals where the Data Override Feature was used (the proposal development number is in red)
Overview of the Proposal Development process

Start proposal, fill in details

- Enter details in proposal tabs

Create and finalize budget

- Several budget versions can be created
- Select one budget as final and complete

Upload attachments (narratives)

- Upload PDFs of all attachment (narrative) files

Complete the proposal

- Answer Yes/No Questions
- Certify the investigators
- Check and finalize narrative and budget

Submit proposal for departmental and ORPA approval

- Submit
- Approval maps are set for each department participating in the proposal
Start a New Proposal

Click on the Maintain Proposal Development button

Click either the red X or the cancel button

Click the New button

Write down the proposal number.

Make sure the lead unit is right. If it’s wrong, start the proposal over in the correct lead unit.

Coeus refers to department numbers as “units”. This is because Coeus was developed at MIT and at MIT, departments are units. In Coeus, units and departments are the same thing. All Coeus proposals are created and submitted at the dept’s “main level” ("ends in 00" level). When awarded, the dept determines the appropriate subdept, as applicable.
**Proposal Tab**

The proposal tab is used for entering basic information about the proposal such as title, proposed start & end dates, and sponsor.

- **Highlighted in Yellow:** Must fill in
- **Highlighted in Orange:** Must fill in if it applies to the proposal.
- **Highlighted in Pink:** Generally just for s2s
- **Red X:** Not used or no longer used
- **No highlighting:** You can fill it in if you'd like, but you don't have to.
<table>
<thead>
<tr>
<th>Proposal Tab Field</th>
<th>What it means/how to fill it in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal No</td>
<td>This is your Proposal Development Proposal number -- a sequentially assigned number without any meaning. Write this number down because knowing the Coeus proposal number is the fastest way to find the proposal.</td>
</tr>
<tr>
<td>Status</td>
<td>See Proposal Development status chart below.</td>
</tr>
<tr>
<td>Proposal Hierarchy icon</td>
<td>See the proposal hierarchy section of this guide for the definition of a proposal hierarchy.</td>
</tr>
<tr>
<td></td>
<td>• Red X: Not part of a hierarchy</td>
</tr>
<tr>
<td></td>
<td>• + sign: Parent proposal in a hierarchy</td>
</tr>
<tr>
<td></td>
<td>• - sign: Child proposal in a hierarchy</td>
</tr>
<tr>
<td>Narrative icon</td>
<td>• Red X: No narrative files have been uploaded</td>
</tr>
<tr>
<td></td>
<td>• Blue</td>
</tr>
<tr>
<td></td>
<td>• Green Checkmark: Files have been uploaded and all are marked Complete.</td>
</tr>
<tr>
<td>Budget icon</td>
<td>• Red X: No budget has been entered</td>
</tr>
<tr>
<td></td>
<td>• Blue</td>
</tr>
<tr>
<td></td>
<td>• Green Checkmark: Budget is marked Final and Complete.</td>
</tr>
<tr>
<td>Title</td>
<td>Title of Proposal as provided by PI</td>
</tr>
<tr>
<td>Start Date</td>
<td>Anticipated Proposal Start Date Enter date in any format; Coeus will format it for you when you click or tab out of the field</td>
</tr>
<tr>
<td>End Date</td>
<td>Anticipated Proposal End Date. Do not make the End Date the same day of the year as the proposal start date. If the proposal start date is 12/1 and the proposal end date is 12/1, there will be an additional budget period that is 1 day long.</td>
</tr>
<tr>
<td>Proposal Type</td>
<td>See Proposal Type chart below</td>
</tr>
<tr>
<td>Activity Type</td>
<td>See Activity Type chart below</td>
</tr>
<tr>
<td>Anticipated Award Type</td>
<td>Not used.</td>
</tr>
<tr>
<td>Sponsor</td>
<td>Source of the funding. If you know the Coeus code for the sponsor, type it in the box including any leading zeros; otherwise, click on the Search button next to the Sponsor field to find the sponsor code. After typing in the sponsor code or selecting it in the search results, Coeus will fill in the sponsor’s name next to the box. If you can’t find the sponsor, it might be new. Email the sponsor information (name, sponsor type, address, and phone/email info) to <a href="mailto:coeus_help@princeton.edu">coeus_help@princeton.edu</a>. In the meantime, you can keep working on your proposal without a sponsor filled in.</td>
</tr>
<tr>
<td>Prime Sponsor</td>
<td>Only fill this field in if Princeton is a subcontract recipient. If NSF grants an award to Harvard, and Harvard subcontracts out part of the work to Princeton, NSF is the prime sponsor and Harvard is the sponsor.</td>
</tr>
<tr>
<td>Program Title</td>
<td>The sponsor’s program / notice of opportunity / solicitation title.</td>
</tr>
<tr>
<td>Notice of Opportunity</td>
<td>How did your PI learn about this opportunity? Not a mandatory field; can be left blank.</td>
</tr>
<tr>
<td></td>
<td>• RFP: Request for Proposal</td>
</tr>
<tr>
<td></td>
<td>• Program Officer</td>
</tr>
<tr>
<td></td>
<td>• Publication</td>
</tr>
<tr>
<td>Funding Opportunity Number</td>
<td>Sponsor’s identifying number for this opportunity. Usually listed on the sponsor’s notice of opportunity.</td>
</tr>
<tr>
<td>Agency Program Code</td>
<td>Used mainly for NSF and sometimes for s2s.</td>
</tr>
<tr>
<td><strong>Agency Routing Identifier</strong></td>
<td>Mainly used for s2s; see the s2s guide.</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td><strong>Award No.</strong></td>
<td>Not used post-Prime. Pre-Prime, this was the Coeus award number.</td>
</tr>
<tr>
<td><strong>NSF Code</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>Original Proposal</strong></td>
<td>For a renewal of an existing award, supplement to an existing award, a revision of an existing award, or a preaward revision, this is the original Institute Proposal number (not Proposal Development number).</td>
</tr>
<tr>
<td><strong>Subcontract box</strong></td>
<td>If there will be subcontracts to other institutions if this proposal is awarded, then check this box. Do not check this box if Princeton is the subcontract recipient.</td>
</tr>
<tr>
<td><strong>CFDA Number</strong></td>
<td>For federal proposals only, this is the Catalog of Federal Domestic Assistance number. Usually listed on the sponsor’s notice of opportunity.</td>
</tr>
<tr>
<td><strong>Agency Div Code</strong></td>
<td>Used mainly for NSF and sometimes for s2s.</td>
</tr>
<tr>
<td><strong>Previous Grants.gov Tracking ID</strong></td>
<td>For s2s proposals that errored; see the s2s guide.</td>
</tr>
</tbody>
</table>

**Proposal Development Status Chart**

<table>
<thead>
<tr>
<th>Proposal Development Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In progress</strong></td>
<td>Still working on the proposal</td>
</tr>
<tr>
<td><strong>Approval in progress</strong></td>
<td>Submitted for dept. approval</td>
</tr>
<tr>
<td><strong>Submitted</strong></td>
<td>Approved by ORPA; submitted by ORPA to the sponsor</td>
</tr>
<tr>
<td><strong>Rejected</strong></td>
<td>Rejected by dept. or ORPA; needs to be corrected and submitted again for approval</td>
</tr>
</tbody>
</table>
| **Post-submission Approval**        | • Approved by ORPA and submitted to sponsor but meets University Research Board (URB) readership criteria  
|                                     |  ▪ Over $5 million in total costs                                         |
|                                     |  ▪ Biosafety level 3 handling                                              |
|                                     |  ▪ Countries embargoed or restricted                                      |
|                                     |  ▪ Unusual implications for the university                                |
|                                     | • 2 URB members review the proposal                                       |
|                                     | • After URB approves, the status is Submitted                             |
|                                     | • If URB rejects, the status is Post-submission Rejection                 |
### Proposal Type Chart

<table>
<thead>
<tr>
<th>Coeus Proposal Type</th>
<th>Coeus Proposal Type Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New</strong></td>
<td>• New application</td>
</tr>
<tr>
<td></td>
<td>• For competitive sponsor resubmissions (such as NIH) with a new deadline</td>
</tr>
<tr>
<td></td>
<td>• NSF renewals should be proposal type New in anticipation of a new sponsor award number</td>
</tr>
<tr>
<td><strong>Supplement to an Existing Award</strong> (Known as Revision prior to 11/1/16)</td>
<td>• Supplemental (additional) funding for an existing award that has been set up in PS Financials</td>
</tr>
<tr>
<td></td>
<td>• Includes requests for additional funding to meet increased or new costs that are within or related to the scope of the approved application.</td>
</tr>
<tr>
<td></td>
<td>• Overlaps the existing period of performance.</td>
</tr>
<tr>
<td></td>
<td>• Example:</td>
</tr>
<tr>
<td></td>
<td>• Existing award was originally funded for $100k. PI applies for additional funding of $50k that was not part of the sponsor’s original anticipated award amount.</td>
</tr>
<tr>
<td></td>
<td>• SF424 R&amp;R form uses the term “Revision” for this scenario. Selecting Supplement will map to Revision on the SF424 R&amp;R form for s2s submissions.</td>
</tr>
<tr>
<td><strong>Renewal of an Existing Award</strong></td>
<td>• An application requesting additional funding for a period subsequent to that provided by a current award.</td>
</tr>
<tr>
<td></td>
<td>• Example:</td>
</tr>
<tr>
<td></td>
<td>• Existing 5 year award is ending this year. PI is applying for another 5 years of funding.</td>
</tr>
<tr>
<td></td>
<td>• Typical proposal type for DOE and some industry sponsors for existing awards</td>
</tr>
<tr>
<td></td>
<td>• NSF renewals should be proposal type New in anticipation of a new sponsor award number</td>
</tr>
<tr>
<td><strong>Preaward Revision</strong> (Known as Resubmission prior to 11/1/16)</td>
<td>• Amended or revised new application, supplement, or renewal before the new proposal, supplement or renewal is awarded and set up in PeopleSoft.</td>
</tr>
<tr>
<td></td>
<td>• Do not use this type for proposals that have already been awarded and set up in PeopleSoft.</td>
</tr>
<tr>
<td></td>
<td>• Using this type overwrites an already-approved unfunded, pending status Coeus institute proposal</td>
</tr>
<tr>
<td></td>
<td>• Used for documentation of congruency letters/special review tab updates</td>
</tr>
<tr>
<td></td>
<td>• Examples</td>
</tr>
<tr>
<td></td>
<td>• Sponsor requests changes to an existing, submitted proposal before issuing the award, such as budget changes</td>
</tr>
<tr>
<td></td>
<td>• NSF requests a revised proposal budget before issuing the award</td>
</tr>
<tr>
<td></td>
<td>• Do not use for ASSIST NIH resubmissions. NIH “01A” resubmissions should be submitted as New applications in Coeus.</td>
</tr>
<tr>
<td><strong>Revision of an Existing Award</strong> (Known as Post Award Revision prior to 11/1/16)</td>
<td>• Revising budgets for any of the years on an existing award.</td>
</tr>
<tr>
<td></td>
<td>• This type should not be used for additional funding (supplements or renewals).</td>
</tr>
<tr>
<td></td>
<td>• This type should be used when the sponsor requests a revised budget after the proposal has been awarded and has been set up in PS Financials.</td>
</tr>
<tr>
<td></td>
<td>• Examples:</td>
</tr>
<tr>
<td></td>
<td>• The sponsor has requested a revised budget for year 2 after already awarding year 1.</td>
</tr>
<tr>
<td></td>
<td>• The sponsor requests a spending plan every year for an existing award</td>
</tr>
<tr>
<td></td>
<td>• The sponsor requests a budget each year to be reflect the current fringe rate for an existing award</td>
</tr>
</tbody>
</table>
- Sponsor has a budget reduction and is requesting a revised, reduced budget.
- This type routes directly to ORPA and does not go through the departmental approval path.

<table>
<thead>
<tr>
<th>White Paper / Letter of Intent / Pre-Proposal</th>
</tr>
</thead>
<tbody>
<tr>
<td>- This type must be entered in Coeus if it requires ORPA approval</td>
</tr>
<tr>
<td>- Also known as a pre-proposal, a white paper / letter of intent is a condensed version of a proposal.</td>
</tr>
<tr>
<td>- The sponsor determines if the PI should submit a full proposal based on the information in the pre-proposal</td>
</tr>
<tr>
<td>- This proposal type might not have a budget. If so, set the $0 budget to final and complete in order to submit the proposal.</td>
</tr>
<tr>
<td>- This type will have its own IP number after ORPA approval. If the sponsor invites the PI to submit a full proposal, the full proposal will be type “New” and will have its own IP number. The new proposal should not be linked to the white paper/letter of intent/pre-proposal.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-Funded Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Use this type for non-funded agreements</td>
</tr>
<tr>
<td>- Examples:</td>
</tr>
<tr>
<td>- Non-funded data agreement</td>
</tr>
<tr>
<td>- Non-funded research collaboration agreement</td>
</tr>
<tr>
<td>- Non-funded Memorandum of Understanding (MOU)</td>
</tr>
<tr>
<td>- Non-funded Non-Disclosure Agreement (NDA)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Used when the funding on the main award has already been received and Princeton is awarding new projects based on the outcome of an internal competition. (Must have ORPA Director’s approval)</td>
</tr>
</tbody>
</table>

**Why does choosing the right proposal type matter?**

**Proposal types are the basis for many reports**

- Trustees
- URB
- DFR

**Certain proposal types are excluded**

- Revision to an Existing Award
- Pre-proposal
- White paper / letter of intent / pre-proposal

**Activity Type Chart**

<table>
<thead>
<tr>
<th>Description</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organized Research</td>
<td>Research</td>
</tr>
<tr>
<td>Equipment</td>
<td>Equipment</td>
</tr>
<tr>
<td>Conference/Workshop/Travel</td>
<td>Conference/Workshop/Travel</td>
</tr>
<tr>
<td>Fellowship</td>
<td>Fellowship</td>
</tr>
<tr>
<td>Instruction/Curriculum</td>
<td>Example is NJ STEP program involving training prisoners.</td>
</tr>
<tr>
<td>Training Grant</td>
<td>Training grants such as NIH T32s and NSF RGTs.</td>
</tr>
<tr>
<td>Other Inst’l &amp; Sponsored Activ</td>
<td>Other activity that does not fall into the above categories. Example is Programming for the Art Museum</td>
</tr>
</tbody>
</table>
The Organization tab should be completely ignored unless your proposal is s2s; see the s2s guide.

Do not change any information on this tab unless you are doing s2s as per the s2s guide. By default, The Trustees of Princeton University is the Organization, the ORPA Director is listed, and NJ-012 is the congressional district. Do not change this default information.
The Mailing Info Tab

The Mailing Info tab is used for recording the Sponsor's Deadline Date. If your dept prints the generic cover page, fill in the Mailing Address too.

<table>
<thead>
<tr>
<th>Mailing Info Tab</th>
<th>What it means/how to fill it in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Sponsor’s deadline date. The proposal is due to your ORPA rep 5 business days before this date.</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>Only fill this in if your dept prints the generic cover page; the generic cover page will not print unless this address is filled in (and there is a budget marked as final). Use the magnifying glass to find the mailing address of the person at the sponsor who is receiving the application. Use the eraser button to remove the address completely from the proposal. If the person or address you need is not in the rolodex, you can add the person to the rolodex; see Rolodex section of this guide.</td>
</tr>
<tr>
<td>Other fields</td>
<td>Mostly self-explanatory; you can fill them in if you want to or just leave them blank; they are not required and not used by ORPA.</td>
</tr>
</tbody>
</table>
The Investigator Tab

Who is listed on this tab?

- For non-s2s proposals, the Investigator tab lists only Princeton PIs and Co-PIs for this proposal.
- If the proposal is s2s, this tab may contain non-Princeton co-PIs; see the s2s guide.

Who is not listed on this tab?

- Do not list TBA people.
- Do not list the same person on the Investigator tab and the Key Person tab.

NIH Fellowship?

- non-s2s: List the Professor on the Investigator tab and the Student on the Key Person tab
- s2s: List the Student on the Investigator tab and the Professor on the Key Person tab

Investigators must be certified on this tab before submitting the proposal.

A person’s home unit (as per PS HCM) is listed by default at the bottom of the panel; do not delete anyone’s unit.

If the proposal is through a center or program, add the center/program unit to the lead PI.

Proposals will route to all depts listed on this tab for approval. Do not remove any depts from this tab.
<table>
<thead>
<tr>
<th><strong>Mailing Info Tab</strong></th>
<th><strong>What it means/how to fill it in</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hand/claw icon</strong></td>
<td>The unit info at the bottom of the screen corresponds to the person highlighted at the top of the screen.</td>
</tr>
<tr>
<td><strong>Person Name</strong></td>
<td>List the lead PI first. Add co-PIs as needed.</td>
</tr>
<tr>
<td><strong>PI box</strong></td>
<td>This column should be labeled “Lead PI”. Check this box for the person who is the lead PI.</td>
</tr>
<tr>
<td><strong>Multi PI box</strong></td>
<td>This is for NIH multi-PI s2s proposals only. Check this box for every person listed on this tab, including the lead PI, only if this proposal is an NIH multi-PI s2s proposal. Otherwise, leave all multi-PI boxes unchecked.</td>
</tr>
<tr>
<td><strong>Faculty</strong></td>
<td>This box is automatically checked if the feed from PS HCM lists this person as a Faculty member.</td>
</tr>
<tr>
<td><strong>Effort</strong></td>
<td>Not used. Do not fill in.</td>
</tr>
<tr>
<td><strong>Academic Year Effort</strong></td>
<td>Not used. Do not fill in.</td>
</tr>
<tr>
<td><strong>Summer Year Effort</strong></td>
<td>Not used. Do not fill in.</td>
</tr>
<tr>
<td><strong>Calendar Year Effort</strong></td>
<td>Not used. Do not fill in.</td>
</tr>
<tr>
<td><strong>Certify</strong></td>
<td>Red X: PI is not certified. Green checkmark: PI is certified. Use the Certify button the certify investigators.</td>
</tr>
<tr>
<td><strong>Lead Unit</strong></td>
<td>Must be checked for the person checked as Lead PI.</td>
</tr>
<tr>
<td><strong>Unit Number/Unit Name</strong></td>
<td>Unit will be the Investigator’s home unit as listed in PS HCM. If the proposal is through a center or program, <em>add</em> your unit number to the person’s home unit with the Add Unit button. The proposal will be routed to all units listed on this tab.</td>
</tr>
<tr>
<td><strong>Add</strong></td>
<td>Although it is tempting to use the Add button to add someone, use the Find Person button instead. If you do use the Add button, you’ll have to click on Find Person to find the persons or use the Delete button to delete the row.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Deletes the row.</td>
</tr>
<tr>
<td><strong>Find Rolodex</strong></td>
<td>Only use this button if your Investigator is coming to Princeton but is not at Princeton yet and can’t be located in “Find Person”, or if your proposal is s2s and your PI or co-PI is a non-Princeton person. If the person cannot be located with “Find Rolodex”, then you’ll need to add them to the rolodex; see the rolodex section.</td>
</tr>
<tr>
<td><strong>Find Person</strong></td>
<td>Click on this button to search for your Princeton investigators.</td>
</tr>
<tr>
<td><strong>Certify</strong></td>
<td>Click on this button to Certify investigators; each person on this tab needs to be certified. After you certify a person and press save, this red X will change to a green checkmark.</td>
</tr>
<tr>
<td><strong>Credit Split</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>Add Unit</strong></td>
<td>If the proposal is through a program or center, use this button to add the proposal home unit to the Lead PI’s list of units.</td>
</tr>
<tr>
<td><strong>Delete Unit</strong></td>
<td>Do not delete anyone’s home unit! (Otherwise the proposal will not be routed to their dept for approval, and your ORPA rep will reject your proposals and you will have to add the person’s home unit back to the person and submit again). Only use this if you accidentally add the wrong lead unit number here.</td>
</tr>
<tr>
<td><strong>Find Unit</strong></td>
<td>Use this button to find and add a unit for a center or program.</td>
</tr>
</tbody>
</table>
How to add a Princeton Investigator

1. Press Find Person

Enter their name (or part of their name and a star)

Press Find

Select the person from the list. Click Ok.
How to add another Princeton Investigator

Click Find Person again and go through the steps as in the previous section, but you won’t have to add the lead unit again. Be sure to not remove anyone’s home unit.

How to add a non-Princeton Person

Only add non-Princeton people if:

1. It’s a person who is coming to Princeton University and is applying for funding as if they are here but they are not yet in the Princeton person search (i.e. they cannot be found using the “Find Person” button).
2. It’s an s2s proposal and the person must appear on the Senior/Key Person form.

Otherwise, do not add non-Princeton people.
If the person’s name is not in the search results list, you’ll have to add them to the Rolodex first. Please see the Rolodex section of the manual.
FYI: Personnel Names, PS primary name and PS preferred name

On 4/16/09, the personnel names in all Coeus modules were updated to not include special characters (i.e. removing accents from characters). This makes searching for personnel names easier in all modules, and also helps with system-to-system Coeus to Grants.gov connection, since special characters cause submission issues for Grants.gov. However, at that time, the PeopleSoft primary name was pulled in instead of the PeopleSoft Preferred name. As of 5/14/09, the Preferred PeopleSoft name without special characters is being used.

If you know of a PI in your department whose Coeus Personnel name (PeopleSoft Preferred name) differs from his or her eRA Commons name, please let the Coeus coordinator know immediately.

A note about inactive people

As of 3/28/12, a new rule was added to Coeus production. This validation rule checks to see if anyone on the Investigator or Key Person tab has inactive status at Princeton.

If you try to submit a proposal with an inactive person on the investigator or key person tab, you will see this error message:
A person on the Investigator or Key Person tab is inactive.
Please remove the inactive person and coordinate with your ORPA administrator.

You will then need to do what it says (contact your ORPA administrator) to continue.
Certifying investigators

Press the Certify button

Answer yes or no. Click OK
BUG ALERT: You press the Certify button on the Investigator tab but Coeus tells you “This is not a proposal person”. This intermittently happens without reason. The workaround is to remove the person from the investigator tab, press save, add the person back. Then you should be able to certify the person.
Printing the certification form through Coeus

If you have green checkmarks for everyone, click on the Action menu. Select Print Certifications

NOTE: The certification form can only be printed if the certification question in Coeus has been answered.

The certification will print in a separate window.

Save and/or print them.

Have your Investigators check off the appropriate boxes and sign each form.

You can then scan the forms into your computer and upload them as "PI Certification" in the Coeus narrative. (See the Narrative section)

As a principal or co-principal investigator on the above referenced proposal, I certify that:
Printing the Certification Form through the Coeus home page

Printing the cert form through Coeus is a bit of a chicken and egg situation. You can’t print the form for the investigator to sign until you certify the investigator for conflict of interest, but you might not know if there is a conflict of interest until the investigator signs the form.

You can either answer No on the Coeus search screen, print the form through Coeus, then change it to Yes on the Coeus cert screen if the investigator checks off yes on the form, or you can just print the form from the Coeus home page and then answer the cert question in Coeus (and not print the form at all through Coeus).

The Adobe fillable version of the PI cert form is on the Coeus Forms page at http://www.princeton.edu/orpa/coeus/coeus-forms/.

The Key Person Tab

The Key Person tab lists key people on the proposal who appear on the application submitted to the sponsor.

- For federal proposals, only include on this tab key people who are listed on the senior/key person form.
- Do not list non-Princeton people on this tab unless the proposal is submitted via s2s; see the s2s guide.
- Do not list TBA people on this tab.
- Do not list the same person on both the Investigator and the Key Person tab. It's one tab or the other, not both.
How to add a Princeton Key Person

The steps are the same as for adding a Princeton Investigator except the person is added on the Key Person tab; please see prior section.

How to add a non-Princeton Key Person

The steps are the same as for adding a non-Princeton Investigator; please see prior section.

How to add the Unit

When you initially add a Princeton or non-Princeton person to the Key Person tab, no unit information will be displayed at the bottom.

- If the unit the person is associated with is already on the Investigator tab, there is no need to add the unit information here.
- If the unit the person is associated with is not already on the Investigator tab, click on “Add Unit” and then enter the unit number in the Unit Number box; click or tab out and Coeus will automatically fill in the unit name.

A note about inactive people

As of 3/28/12, a new rule was added to Coeus production. This validation rule checks to see if anyone on the Investigator or Key Person tab has inactive status at Princeton.

If you try to submit a proposal with an inactive person on the investigator or key person tab, you will see this error message:
A person on the Investigator or Key Person tab is inactive.
Please remove the inactive person and coordinate with your ORPA administrator.

You will then need to do what it says (contact your ORPA administrator) to continue.
The special review tab is used to list research that requires the submission of a protocol and approval from the appropriate Research Integrity and Assurance (RIA) compliance committee at Princeton University. The PI must submit a protocol to the appropriate committee for any human subjects, animal research, recombinant DNA or biohazardous materials that are described in the proposal.

This tab is also used to record Export Control information for Equipment Export, Foreign Collaborators, Foreign Travel, and ITAR items.

### Special Review: humans, animals, biohazards, rDNA

<table>
<thead>
<tr>
<th>Special Review type</th>
<th>Oversight board</th>
<th>Abbr.</th>
<th>Contact address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human subjects</td>
<td>Institutional Review Board for Human Subjects</td>
<td>IRB</td>
<td><a href="mailto:irb@princeton.edu">irb@princeton.edu</a></td>
</tr>
<tr>
<td>Animal Usage</td>
<td>Institutional Animal Care and Use Committee</td>
<td>IACUC</td>
<td><a href="mailto:iacuc@princeton.edu">iacuc@princeton.edu</a></td>
</tr>
<tr>
<td>Biohazardous materials</td>
<td>Institutional Biosafety Committee</td>
<td>IBC</td>
<td><a href="mailto:ibc@princeton.edu">ibc@princeton.edu</a></td>
</tr>
<tr>
<td>and/or recombinant DNA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Special Review: Export Control

Equipment Export, Foreign Collaborators, Foreign Travel, ITAR items

https://www.princeton.edu/orpa/compliance/export-controls/

John Jenkins, Export Control Officer
exports@princeton.edu
How to enter Special Review data

For IRB, IACUC, or IBC protocols: Select the Special Review type and Approval status.

If approved or exempt, enter the protocol number, application date and approval date.

If pending, protocol number and dates can be left blank.

For export controls, select the appropriate type.

Enter details about the export control in the Comments box.

Leave other boxes blank.

<table>
<thead>
<tr>
<th>Approval status</th>
<th>When to use this status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Only when the protocol has been approved by the appropriate RIA committee. The PI has received an official approval letter from the committee.</td>
</tr>
<tr>
<td>Exempt</td>
<td>Only when the protocol has been declared exempt by the appropriate RIA committee. The PI has received an official exemption letter from the committee.</td>
</tr>
<tr>
<td>Pending</td>
<td>The PI has submitted a protocol to the appropriate RIA committee, but protocol approval has not been granted, or the PI has not yet applied for approval.</td>
</tr>
<tr>
<td>DO NOT USE – Not yet applied</td>
<td>This status is no longer used. Do not select this status.</td>
</tr>
<tr>
<td>Blank</td>
<td>Only leave approval type blank for Export Control items. If it’s a RIA protocol, select one of the approval statuses above.</td>
</tr>
</tbody>
</table>
Tip! If you accidentally add a blank row (in any Coeus tab), and try to save, Coeus says you need to fill in that row.

If you don't need the blank row, click on that blank row (so the hand/claw points to it) and press Delete. Then you will be able to save.

Tip! If you accidentally add a blank row that you do not need, highlight the row and click on the [Delete] button on the right side of the panel. Coeus will not allow you to save if there is a blank row on the Special Review panel.

Congruency Reviews and the Special Review tab

Since 9/15/13, the IACUC and IBC offices have conducted a pilot program involving congruency reviews for new federal and non-federal awards involving animal research, biohazardous materials or recombinant DNA.

Congruency review means that the animal, biohazardous material and/or recombinant DNA research described in the proposal matches the animal, biohazardous material and/or recombinant DNA research described in the protocol.

The pilot process is as follows:
1. Sponsor notifies ORPA that proposal has been awarded.
2. ORPA sees the award has animal and/or biohazardous research.
3. ORPA notifies dept that award is here and has animal and/or biohazardous research.
4. Dept works with appropriate office(s) within RIA to obtain the compliance congruency letter(s). This includes the appropriate office(s) within RIA sending the congruency letter(s) back to the dept.
5. Dept then copies the original Coeus Proposal Development proposal, changes proposal type to Preaward Revision, and adds updated compliance info on the special review tab if necessary. Dept also uploads the congruency letters into the appropriate Coeus narrative type. Multiples of each type can be selected if there are multiple protocols on a proposal:
   a. IACUC Congruency
   b. IBC Congruency
6. Dept submits the copied proposal as a Preaward Revision for approval.
7. After dept approves, the GCA in ORPA then reviews the proposal, checks for current protocol dates and the congruency letters in the narrative section, and approves. GCA then enters the
Institute Proposal number upon approving to link the original Proposal Development proposal and the resubmitted Proposal Development proposal to one Institute Proposal number.

8. The GCA would then ask the award specialist to setup the award.

Please only attach congruency letters that you receive from the IACUC and IBC office. Emails or other forms of documentation are not acceptable.

The process for congruency review for subawards with compliance research; existing active awards; and incremental funding, is still to be worked out.

If you have IACUC/IBC questions, please contact IACUC@princeton.edu or IBC@princeton.edu.
The Science Code Tab

The Science Code Tab is not used at Princeton; skip it!

The Other Tab

The Other Tab is used to capture the PS Award ID for a renewal of an existing award, a supplement to an existing award, or a revision of an existing award.

Type the 10 digit PS Award Number into the PS Award No box if this proposal is a renewal of an existing award, a supplement to an existing award, or a revision of an existing award.

Saving the Proposal: save frequently!

Click Save frequently! Coeus does not automatically save most items, so be sure to press save often!!!
Uploading Attachments (Narratives)

Uploading Narrative Files

Upload all proposal files in the Narrative window. Examples of proposal files include the Narrative, Budget Justification, the sponsor's RFP, PI certification forms, and cost sharing commitment letters/forms (if applicable), among others.

It is recommended that PDF files only are uploaded, though Coeus will allow other file types such as Word docs and Excel files.

The proposal files should be final and complete before routing for approval.

If you are submitting via s2s, see the s2s guide for s2s-specific narrative information.

**Pink:** Either the Narrative or SOW is required
**Yellow:** Must upload with every proposal
**Orange:** Must upload if applicable
Click Add

Select Narrative Type from the menu.

Click Upload.
Find the narrative file on your computer.

Click Open.

The file name populates.

Click View to verify the correct file was uploaded, it was not truncated or corrupted, etc. If you need to overwrite it, click Upload to find the right file.
Change status to Complete and click OK.

Ignore User/Rights on this side of the screen.

The Narrative row is displayed. Repeat to upload more narrative files.

This shows who uploaded the file, when it was uploaded, and what the name of the file is.
Changing status from Incomplete to Complete

If the file is still Incomplete status, highlight the row and click on the Edit button.

Change status to Complete and click OK.

Now it's complete.
Replacing/overwriting a narrative file

One method for overwriting a file:
Highlight the row, then click on the Narrative Upload button.
Select the new file, then click Open.
Click on the icon to view the file to make sure it's the right file, has not been corrupted or truncated, etc.

The Other Method for Replacing a File:
Highlight the row.
Click the Edit button.

Press the Upload button to find the file you want to upload.
Then click OK.
Deleting a row

Highlight the row.
Click the delete button.
Coeus will ask you to confirm the deletion.
Click Yes.

Moving Narrative rows

If you want to, you can highlight a row and press the up or down arrows to reorder them.
You don’t have to put them in any particular order, though.

Closing the Narrative window to return to the proposal tabs

Click the yellow folder icon to return to the Proposal tabs.
Overall

Press Close when you are done with this module.

You can:
--click on the icon for a row to view the file
--click on a row, then press the Edit button to edit status or overwrite a file
--can press the Upload Narrative button in the second toolbar to overwrite a file
--press the Eraser button in the second toolbar to remove a row
--use the aqua arrows in the second toolbar to reorder the narrative rows

<table>
<thead>
<tr>
<th>No.</th>
<th>Status</th>
<th>Narrative Type</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Complete</td>
<td>Narrative</td>
<td>You can type in some notes here if you want.</td>
</tr>
<tr>
<td>2</td>
<td>Complete</td>
<td>Budget_Justification</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Complete</td>
<td>PI certification</td>
<td>Cert forms for all Pls</td>
</tr>
<tr>
<td>4</td>
<td>Complete</td>
<td>Other- internal only --no longer used</td>
<td>Some other file (include your notes here)</td>
</tr>
</tbody>
</table>

Contact Name: __________________________ Phone Number: ______________
**Answering Yes/No Questions**

The Yes/No Questions (YNQ) button contains mandatory questions about the proposal.

The questions are also in a fillable Adobe form called the "PI Yes/No Questionnaire" on the Coeus Forms page. Download the form and send it to your PI, then you can copy the answers to Coeus.

If the answer to any of the export control questions P6 through P9 is Yes, fill in further details on the Special Review tab.

Answering Yes to questions P1 and P2... automatically triggers University Research Board (URB) review of the proposal, which occurs after the proposal has been submitted to the sponsor. See the URB section of this manual for details.
How to fill out the YNQ

The Adobe Fillable version of the YNQ is available here on the Coeus Forms page. Give this form to your PI, then transcribe the answers from the form into Coeus.

Answer each question. Answering yes to some questions may require a description in the explanation box.

Use the scroll bar to access all questions, then click OK.

The Adobe Fillable version of the YNQ is available here on the Coeus Forms page. Give this form to your PI, then transcribe the answers from the form into Coeus.
Submitting the Proposal for Routing

In order to submit a proposal, you must have:

- Certified investigators (see Investigators section)
- Answered the YNQ (see YNQ section)
- Marked your budget final and complete (see Budget section)
- Changed all narratives/attachments to complete (see Narratives section)

Press the submit button in the second toolbar.

- The approval map is displayed
- The proposal status changes from "In Progress" to "Approval in Progress"

**How to Submit for Approval**

![Press the Submit icon](image)

![All Coeus validation rules were passed successfully](image)

![The proposal has been successfully submitted for routing](image)
NOTE: If you get this message:

Submission of proposal failed because no routing stops have been defined.

"Submission of proposal failed because no routing stops have been defined" means that there is no budget entered. If your proposal doesn’t require a budget (possible with white papers/letter of intent/pre-proposal), you still need to mark the $0 budget as final and complete. Go to the budget, click on the New button, click OK to the next box, and change the status of the budget to Final and Complete without entering any budget data. You will then be able to submit the proposal.

- NOTE: If you get the "Lock deleted by DB Admin" message when trying to submit, close Coeus, reopen Coeus and it should be ok.

- If you copy a proposal and then try to submit it, Coeus states the narratives are incomplete, even though they are marked as complete. This is normal
behavior; Coeus is basically asking you to confirm you really don’t want to make changes to the narratives. However, sometimes when you start a brand new proposal from scratch, and you mark all narratives as complete, Coeus might tell you that the narratives are incomplete. We found that setting the status of one narrative from complete to incomplete, then changing it back to complete and pressing save, seems to resolve this issue and you will be able to submit.

The Approval Process

Approval Maps

Maps are already set in Coeus.

- Each map should have one primary and at least one secondary approver
- Only one person on the map for that unit needs to approve
- Changes to approvers? Let me know.

Approvals must be done by one person from each unit listed on the Investigator and Key Person tabs before the proposal is reviewed by ORPA

- If chemistry and physics are collaborating on a proposal, both chemistry and physics must approve the proposal.
- If the proposal is through a center like PRISM and the PI’s home unit is EE, both EE and PRISM must approve the proposal.
- If the proposal is through an engineering dept, SEAS must also approve the proposal.
- After all depts approve the proposal, then ORPA reviews it and submits it to the sponsor.
- If the proposal meets criteria for URB review, it will be sent to the URB. See the URB section of this manual for details.

Approving can be done in Premium or Lite

- Outlook mail has URL for CoeusLite, but it can be approved in Premium.
- If you want to approve on your mobile device, you must use CoeusLite.

“Waiting for Approval” Emails

Two approval emails are sent: one to the primary approver, and another email to all secondary approvers.
23500 - Proposal 00018334 is waiting for approval

coeusadm@princeton.edu

To: Coeus Test Mail

Thursday, February 25, 2016 4:00 PM

TEST MODE
In Production mode this mail will be sent to [dmacmill@princeton.edu]

Please approve this proposal.

PI: Einstein, Albert
Lead Unit: 23500 : CHM-Chemistry
Proposal Number: 00018334
Sponsor: National Institutes of Health
Deadline Date: March 5, 2016
Title: Kyle's proposal for the PD manual
Sponsor Announcement: This is the sponsor's opportunity title.

Please use the link given below for the project details.

You can view this proposal through CoeusLite at the following address: https://puwebd.princeton.edu:8443/irb/displayProposal.do?proposalNo=00018334

Subject is "waiting for approval"
Proposal is waiting for approval
This is the email sent to the Primary Approver

Link to CoeusLite (but you can approve in Premium if you prefer)
23500 - Proposal 00018334 is waiting for approval

toesadm@princeton.edu

To: Coeus Test Mail

Thursday, February 25, 2016 4:00 PM

TEST MODE
In Production mode this mail will be sent to
[pzaurov@princeton.edu gruschow@Princeton.EDU
warterbu@princeton.edu mc19@princeton.edu]

This is the email sent to the secondary approvers

You are designated as an alternate approver for this proposal.

PI: Einstein, Albert
Lead Unit: 23500 : CHM-Chemistry
Proposal Number: 00018334
Sponsor: National Institutes of Health
Deadline Date: March 5, 2016
Title: Kyle's proposal for the PD manual
Sponsor Announcement: This is the sponsor's opportunity title.

Please use the link given below for the project details.

You can view this proposal through CoeusLite at the following address: https://puwebd.princeton.edu:8443/irb/displayProposal.do?proposalNo=00018334
How to Approve/Reject/Recall in Premium

In Premium, find and open the proposal, click on the approval button in the second toolbar to open the proposal routing panel, then:

- Click Approve to approve
- Click Reject to reject
- Click Recall to remove the proposal from routing ("Oops I didn't mean it!" or "Oops I just saw a typo" or "Oops I forgot to upload something").
- Instead of asking an approver to reject it, if you have the ability to submit, you have the ability to recall.

Approving in premium

![Click on the Proposal Development button]

![Search for the proposal]

![Click Find]
Double click on the proposal in the search results list

Even if you're not an approver nor an aggregator, you can click on the Flag button to view the approval routing map

After submitting, if you're an approver, you can press the approve or reject buttons.

If you're an aggregator (meaning you have the right to submit proposals), you can also recall proposals from routing.
1. Click Approve
2. Click Approve again to confirm approval.

You can fill in approval comments if you want to, but you don’t have to. Princeton does not use the Attachments tab.
Rejecting in premium

Click on the Proposal Development button

1. Search for the proposal

2. Click Find

Double click on the proposal in the search results list
Even if you’re not an approver nor an aggregator, you can click on the Flag button to view the approval routing map.

After submitting, if you’re an approver, you can press the approve or reject buttons.

If you’re an aggregator (meaning you have the right to submit proposals), you can also recall proposals from routing.
1. Click Reject
2. You must fill in rejection comments.
3. Click Reject to confirm rejection.

Princeton does not use the Attachments tab.
Recalling in premium

You should alert the approvers at the current stop that you are going to recall...

...as a professional courtesy in case they are actively reviewing the proposal.

Recall works in Premium or Lite

Recall only works for aggregators (people with the Coeus right to submit proposals)

Proposal can be recalled no matter who has already approved...

... as long as the proposal status is "approval in progress."

Recalled proposals can be edited and resubmitted.

Only the aggregators receive "proposal has been recalled" email.

Approvers do not get recall email.

Recall comments are in the notepad.

Coeus inbox notification sometimes incorrectly shows the primary approver recalled the proposal (bug).

Click on the Proposal Development button

1. Search for the proposal
2. Click Find
Double click on the proposal in the search results list

Even if you're not an approver nor an aggregator, you can click on the Flag button to view the approval routing map.

After submitting, if you're an approver, you can press the approve or reject buttons.

If you're an aggregator (meaning you have the right to submit proposals), you can also recall proposals from routing.
How to Approve, Reject or Recall in CoeusLite

Approve in Lite

Access lite at https://puwebp.princeton.edu:8443/irb/userAuthAction.do
2. Click "Full Proposal Details" to view more Proposal Information, then click Approve, Reject, or Recall.

Clicking on the link in the approval email will lead you to this page.

1. Review summary information, budget reports, and narrative attachments.

Enter approval comments if you want to (optional).

Press Approve to approve the proposal, or press Back to cancel.
Reject in Lite

Access lite at https://puwebp.princeton.edu:8443/irb/userAuthAction.do
Recall in Lite

Access lite at https://puwebp.princeton.edu:8443/irb/userAuthAction.do

1. Click on the link in the approval email, or log on to Lite at https://puwebp.princeton.edu:8443/irb/

2. If the proposal doesn't immediately display, click on Inbox

Click on the link for the proposal title or number
2. Click "Full Proposal Details" to view more Proposal Information, then click Approve, Reject, or Recall.

Clicking on the link in the approval email will lead you to this page.

Press Recall to recall the proposal from approval routing, or press Back to cancel.
Approved, Rejected, and Recalled Emails

Approved email

After Dept approval, the person who approved does not get Outlook email.

If the primary approver approved the proposal, one email is sent to the secondary approvers

- Subject and message “proposal approved by other user”.

If someone other than the primary approver approved the proposal

- One email is sent to the primary approver (subject: “is approved”, message: “proposal approved by other user”)
- One email is sent to the other approvers (subject and message “proposal approved by other user”).

Message moves to Coeus resolved tab for all

After ORPA approval

- All aggregators receive Outlook mail with IP number
- Coeus notification stays in Coeus inbox in unresolved tab
23300 - Proposal 00020976 has been approved by ORPA

coeusadm@princeton.edu

To: Coeus Test Mail

TEST MODE
In Production mode this mail will be sent to [guerin@princeton.edu ss8@princeton.edu mbolden@Princeton.EDU monahall@Princeton.EDU sm@Princeton.EDU vbacic@princeton.edu kburkhar@Princeton.EDU]

---------------------------------------------------------

Coeus Institute Proposal #

The Institute proposal number is 00029002

PI: Bassler, Bonnie L
Lead Unit: 23300 : MOL-Molecular Biology
Proposal Number: 00020976
Sponsor: American Chemical Society
Deadline Date: Title: KB: Another PS Image 16 Award, Foundation
Sponsor Announcement: Comments:

Please use the link given below for the project details.

You can view this proposal through CoeusLite at the following address: https://puwebq.princeton.edu:8443/irb/displayProposal.do?proposalNo=00020976

This email is sent to the aggregators (those who can submit proposals for their dept) after ORPA approves the proposal in Coeus.
Rejected email

The person who rejects does not get Outlook mail.

Regardless of who rejects it, one email is sent to the other approvers with the subject/text as “proposal rejected by other user”.

Message moves in Coeus inbox for all to resolved tab
Recalled email

Recalled in Premium?  The aggregators receive the recall email (not the approvers)

Recalled in Lite?  No email is sent to anyone (known bug)

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Proposal 00018446 has been Recalled

*coesadm@princeton.edu*

To: Coeus Test Mail

Friday, October 24, 2014 5:27 PM

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TEST MODE
In Production mode this mail will be sent to [ kburkhar@princeton.edu cgethers@princeton.edu chacko@princeton.edu corinna@princeton.edu cp@princeton.edu denised@princeton.edu gruschow@Princeton.EDU mc19@princeton.edu mkrause@princeton.edu pzaurov@princeton.edu smullins@princeton.edu sp7@princeton.edu tbrennen@princeton.edu waterbu@princeton.edu ]

 Proposal 00018446 has been Recalled from routing by NET ID kburkhar.
 Please use the link given below for the project details.

You can view this proposal through CoeusLite at the following address:

---

Coeus Inbox

You will have email in your Coeus inbox if:

- If you’re an approver you'll receive “Needs to be approved” proposal messages
- If you’re an aggregator (someone who can submit proposals) you'll receive “Approved by ORPA” messages, or someone recalls a proposal
- If someone sends you an email using the Coeus email button
- NOTE: These messages will also be in your Outlook mail
Dept approvers: after dept approval, message moves to resolved

Notifications (like “ORPA approved” or an email from a colleague): stays in unresolved until you move it
What happens in Coeus after everyone approves?

Coeus Proposal Development status is Submitted
- Submitted is a terminal status

Coeus automatically creates an Institute Proposal
- IP status is Pending

And now we wait to hear from the sponsor!
Viewing all recall and rejection comments in the Notepad

To view all rejection and recall comments in one place, click on the Notepad.

Click the yellow folder icon to close the notepad and return to the other proposal tabs.
To see where the proposal is in the approval map, or to view approval, rejection, and recall comments in the approval screen:

1. Press the Approval button.

2. Click on a level whose comments you want to see. Red Rubber Stamp means that level approved. Yellow stamp means that level has not approved yet.

3. Click on the name of the person who approved or rejected.

4. If they entered comments (optional for approval, mandatory for rejection) the comments will appear here.

5. Press close.
Viewing submission attempts

Click on the Approval flag

Click this button to see when a previous attempt occurred and who recalled/rejected

# of submission attempts
Correcting a rejected or recalled proposal

If the proposal is rejected by a departmental person or ORPA, or recalled, you should open the proposal in Edit mode, make the corrections, and submit the proposal again. It will then make its way through the proposal map starting at the first step.

There is an urban legend that if your proposal is rejected, you have to copy it and make the corrections and submit the copy. You can just make the corrections and submit again.
**BUG: Coeus inbox notification bug with recalling**

In the above example, another aggregator recalled the proposal but the Coeus inbox (premium and Lite too) show that the proposal was recalled by the primary approver (the Chair).

**BUG: Proposal routed by aggregator**

Proposal Routing shows the correct day, time, and user in the “routing start date” section. The correct day and time but the wrong user are displayed in the “routed by aggregator section”.
This displays the correct day, time, and user.

This displays the correct day and time but the wrong user. The right user is displayed at the top of the screen.
Closing and editing proposals

You don’t have to do all your editing & submitting in one session.

Use the yellow folder icon to close the proposal

Use the door icon in the first toolbar or red x to close Coeus completely

Closing the proposal when you’re not ready to submit

Done editing for now but not ready to submit?
Click on the yellow folder icon to close the proposal

Click on either the door icon or red X to log out

Click on the folder to close the module
Editing an existing proposal

Click on the Proposal Development icon

1. Search for the proposal # (Use * in place of zeros for faster searching)
2. Click Find

It is very tempting to double click on the proposal, but that will open the proposal in view-only mode.

To edit the proposal, press the Edit button
The boxes are white, so you are now in Edit mode and can edit the proposal.
Finding the proposal when you don’t know the proposal number

If you don’t know the proposal number, you can search for “in progress” proposals, or search by PI name, part of the title, etc.

Remember, if searching on an investigator’s name, enter their last name (or part of their last name) and a “**”
Copying an Existing Proposal (same lead unit)

Click on the Maintain Proposal Development button

Search for the proposal. (Use * in place of 000)

Click Find
Your new copy will be at the very bottom of your Proposal search results list.

**NOTE:** If you are authorized to create proposals for more than one department, you will be prompted to indicate the unit submitting the proposal. Make sure you select the right department, since the unit number can’t be changed during the proposal process.

- If the proposal dates have changed, follow the instructions in the "Changing Proposal Dates" section of this manual.
- Be sure to sync the rates if you have copied the budget. You may also need to adjust salaries and/or effective date in the Budget Persons (red running guy button) and in the Personnel button (red baron) for each period.

**NOTE:** If you have trouble copying a proposal, there could be a few reasons why. If you were not an aggregator on the original proposal, it will not let you copy the proposal and you will have to ask a coworker who was an aggregator on the original proposal to copy it for you and add you as an aggregator to the copy. If you were an aggregator on the original proposal, there may be a corrupted, uploaded file in the narrative of the proposal you’re trying to copy. If it’s the latter case, usually Coeus will let you copy at least the budget.

If you copy a proposal where the UR rate type is not MTDC, in the copy, the UR rate type defaults back to MTDC. You have to change the copy's UR rate type to match the OH rate type.
Copying an Existing Proposal (from one lead unit to a different lead unit)

Need to have a proposal copied from one unit to another? The Coeus Coordinator can copy it for you. Just let coeus_help@princeton.edu know:

- The proposal number that needs to be copied and the new unit #
- Which narrative rows need to be removed or replaced.
  - Somehow the new unit aggregators can’t replace or delete narrative files, but the Coeus Coordinator can delete the rows for you. Then you can add the new rows and upload the new narratives.
  - If all narrative rows need to be removed/replaced, then the narratives will not be copied.
- Which aggregators in the new unit need access to the copied proposal.
  - When the proposal is copied, it doesn’t add all the aggregators in the new unit, but the Coeus Coordinator can add them.

Editing a proposal that has been rejected or recalled

Unlocking your locked proposal

You want to edit your proposal but Coeus says you’re using it, do you want to open in display mode?

- Why does this happen?
  - Coeus crashed
  - Your computer crashed
  - Proposal wasn’t closed properly
  - No reason at all!
- You can unlock it yourself, if the proposal is locked by your own account
  - Go to File > Current Locks and unlock each row
- If the proposal is locked by someone else’s account...
  - Ask them to unlock it
  - If they are not available, call Kyle or Chiz, and they can unlock it.
Deleting proposals
Who can delete? What kind of proposals can be deleted?

Only aggregators (people who can submit proposals) can delete proposals

Only "in progress" proposals can be deleted.

• Once the proposal has been submitted into routing, it cannot be deleted.

Once a proposal is deleted, it is gone forever

• No one can get the proposal to come back, not you, not me, not the database admin. It's gone for good! There is no way to "get it back".
How to delete

What if you get “null is using proposal” when you try to delete a proposal?

Open the proposal in edit mode and remove all the narrative files, press save and close the proposal. Then try deleting the proposal. If that doesn’t work, then open the proposal in edit mode and delete the budget, press save and close the proposal. Then try deleting the proposal.

What if you want to delete a proposal hierarchy?

If you need to delete a hierarchy, unlink all children from the parent, and the parent will disappear for good, then you can delete the children. If you get “integrity constraint” error messages while trying to unlink the children from the hierarchy, then the hierarchy is probably corrupted somehow and you can’t delete the proposals because you can’t undo the hierarchy.
The University Research Board (URB) Process

Proposals that meet University Research Board (URB) readership criteria are sent to the URB for review, after ORPA submits the proposal to the sponsor. The URB criteria means the proposal meets one or more of the following conditions:

- Over $5 million in total costs (Automatically flagged in Coeus if the total Coeus budget is over $5 million and the proposal type is new)
- Biosafety level 3 handling (Automatically flagged in Coeus if the answer to YNQ P1 is Yes and the proposal type is new.)
- Countries embargoed or restricted (Automatically flagged in Coeus if the answer to YNQ P2. is Yes and the proposal type is new)
- Unusual proposal (As determined by the ORPA GCA)

Proposals that meet URB criteria are assigned by the Senior ERA Manager to two URB faculty committee members: one from humanities or social sciences and one from engineering or natural sciences.

If a URB reader has questions, the Senior ERA Manager sends the questions anonymously to the PI. When the PI responds, the Senior ERA Manager sends the response to the URB reader.

If the URB reader has further questions, the process is repeated until either the URB reader approves or the PI is invited to present the proposal at a URB meeting.

After the URB readers approve, the Coeus Proposal Development proposal status changes from "Post-submission approval" to Submitted.

If the URB rejects, the Coeus Proposal Development proposal status changes to Post-submission Rejection. The proposal would be withdrawn from the sponsor.
Additional Functionality

Adding a Name to the Rolodex

You can add a name to the rolodex....

- If the person is a non-Princeton person & needs to be added to the Investigator or Key Person tab (because they will be at Princeton but are not here yet and are not in the Princeton person search, or the person is an investigator at another school and you’re submitting s2s)
- If your dept loves to print the generic cover page, and the person you are submitting to is not already in the rolodex.

Be sure to check the person doesn't already exist in the rolodex before adding them

- You can edit rolodex entries if you need to.

Click on the rolodex button

Click the Add button.  (If you ever need to edit the entry, you can search for the entry and click the Edit button.)
Add New Rolodex

Rolodex Id:  
Last Update:  
Updated By:  

Last:  
First:  
Middle: 

Name:  
Suffix:  
Prefix:  
Title:  
Sponsor:  
Organization:  
Address:  

City:  
County:  
State/Province Name:  
Postal Code:  
Country:  
Phone:  
Fax:  
E-Mail:  
Comments:  

Fill in as much information about this person as possible & click OK.

You can now use the "Find Rolodex" button on the Investigator tab to find the person you just added.
Notes on what happens when a user moves from one dept to another dept

The Coeus Coordinator removes access from the user’s former dept and adds access to the user’s new dept according to the Coeus Access Request Form. Please note the following:

1. Even though the user’s former dept access was removed in Coeus, she/he will still get the “Approved by ORPA” mail for those proposals that are currently “approval in progress” in their former dept.

2. If anyone in the user’s former dept copies a proposal where the user was an aggregator, the user will be an aggregator on the copy and will get the mail for those proposals too unless the person copying the proposal removes the user from the aggregator role on the copy.

3. Although access is added to view all existing proposals in the user’s new dept, this does not automatically include all existing “in progress” or “approval in progress” proposals created before the user’s arrival in their new dept. If the new user needs to view or work in an existing “in progress” proposal, a current user in the new dept can add that access following the directions on page 86 of the Coeus Proposal Development Guide. If no one in the dept is available to add the access, the Coeus Coordinator can add the access. Any new proposals created from this point forward in the user’s new dept will have the user as an aggregator.

4. New users generally can’t copy old proposals that were created before their arrival in their new unit. The Coeus Coordinator, or an existing user in the person’s new dept can copy the proposal for the new person. Even then, the new person may have trouble deleting or overwriting existing narrative files in the copy. The Coeus coordinator or an existing user in the person’s new dept can delete existing narrative files so the new user can upload the revised files.
Adding Coeus Roles/Adding Coeus rights: Granting View/Update Access to Your Proposal

If you need to give someone access to a proposal on a case-by-case basis

- You can assign that access yourself
- You can assign view only or update access
- You cannot assign or change Approvers (email coeus_help@princeton.edu if the approvers need to change).

If you get a new person in the dept and they need access to proposals going forward

- Fill out the Coeus new user request form (on the Coeus home page) and send it to coeus_help@princeton.edu

Granting access to person who works in your dept

![Image showing steps to grant access](image-url)

1. Click on the roles button.
2. Scroll through the list to find the person you want to add. Click on their name so the row is highlighted in blue.
3. Drag their user name to the Role name (so the Role name is in blue).
4. Click OK.
5. Click Save.

Aggregators can do everything in a proposal, including submitting it. Budget creators can pretty much just work in the budget. Narrative writers can work in the narrative.
Granting access to person who works in another dept

To add a person who works in a different dept to your proposal:

1. Click on the Roles button.
2. Click the Users button.
3. Enter their user ID or last name with a * in the appropriate search box.
4. Click Find.

Alternative way to search: last name and *

1. Click on their name so the row is highlighted in blue.
2. Click OK.
Be sure to press save and then close the proposal. Now the person in the other dept can work in your proposal.
What do the different roles mean?

To see what rights are in a role, click on the role name and then the rights button.

The rights for that role are displayed.
Email notification

You can send email through Coeus if you want to....

- Some people love it (it includes the proposal #, title, PI, deadline date by default, plus your comments)
- Others never use it (you can just use Outlook instead; Coeus mail does not have a Sent box so unless you include yourself, you don’t have a record of what you sent)

Select recipients with the "Add Person" button. You can select multiple recipients.

Type in the subject line you want the email to have.

Type in the Message Body with the text. Other standard default text will be added to the email that is sent.

NOTE: Coeus does not have a "sent" folder so if you want a copy of this mail you will have to add yourself in the "Send To".

You don’t have to use Coeus mail—you can use Outlook if you prefer.
Be sure to sign your mail with your name. The email is sent from coeusadm@princeton.edu, not from your personal account.

Hello There! This is what you wrote as a subject line

coeusadm@princeton.edu Email is from coeusadm@princeton.edu, not your account

Chizzie,
Please check out my proposal--etc etc etc.
Thanks!
Kyle

This is what you wrote as the text

TEST MODE
In Production mode this mail will be sent to [ cmwalter@princeton.edu kburkhar@princeton.edu ]

Proposal#: 00018446
Investigator: Cava, Robert J
Lead unit: 23500 : CHM-Chemistry
Sponsor: National Institutes of Health
Deadline date:
Title: Chocolate Chip Cookies are DELICIOUS!!
Sponsor announcement:
Please use the link given below for the project details.

You can view this proposal through CoeusLite at the following address: 

Default email info

Link to CoeusLite (but you can log on to Premium instead)
Proposals where the Data Override Feature was used (the proposal development number is in red)

If the proposal # box is in red, that means your ORPA rep made a change to the proposal before they approved it

• ORPA reps can make minor changes to proposals that are "approval in progress" status.
• They can change the title, proposal type, add the deadline date, etc.
• The red Proposal No box indicates a change was made.
• Go to Edit > Data Override. Any field with an arrow means a change was made. Click on that row to see the "before" and "after" values.
Any row with an arrow means an update was made.

Click on that row to see the old and new values.