Coeus/eProp

Job Aid

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Log-In, Navigation & Tabs

Enter Access ID and Password:

1. Navigate to the following web link: https://coeusweb.wayne.edu

2. Enter Username (Access ID) and Password

Which opens the eProp home page:
Log-In, Navigation & Tabs

Note: There are a few additional tabs in the toolbar:

- **Coeus Home**: Directs users to the eProp welcome screen.
- Access is currently unavailable for **My IRB Protocols, My COI (Conflict of Interest), My IACUC Protocols and My ARRA**
- **My Proposals** allows users to view and prepare grant applications for Institutional review and approval.
- **Inbox** displays a list of proposals in which the user is involved
- **Use the Logout button to log out**
**Log-In, Navigation & Tabs**

**Begin a new proposal:**

1. Click the **My Proposals** link near the top of the page.

2. Click the **Create New Proposal**.

   **Note:** If a list of business units displays, click the appropriate **Business Unit** name or number. The page then defaults to the General Info screen.

**Or to locate an existing proposal:**

1. Click the **My Proposals** link near the top of the page after logging in.
2. Display the proposal(s):
   a. Click **Proposals In Progress** to display proposals associated with the user’s ID that have been started, but not yet submitted.
   b. Click **All Proposals** to display all proposals associated with the user ID.

3. Select the desired proposal by clicking on it.
Proposal Types in E-Prop:

<table>
<thead>
<tr>
<th>E-Prop Proposal Type</th>
<th>Old FES Proposal Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>New</td>
<td>Initial submission of a proposed research project which requires full sponsor review and institutional signature.</td>
</tr>
<tr>
<td>Continuation</td>
<td>Non-Competing Renewal</td>
<td>Continuation of a previously funded project which requires a progress report and institutional signature.</td>
</tr>
<tr>
<td>Revision</td>
<td>Supplement</td>
<td>Additional support of an existing project which requires sponsor review and institutional signature.</td>
</tr>
<tr>
<td>Renewal</td>
<td>Competing Renewal/Continuation</td>
<td>Continuation of a previously funded project which requires full sponsor review and institutional signature.</td>
</tr>
<tr>
<td>Resubmission</td>
<td>Revision</td>
<td>Resubmission of a proposal that was previously reviewed by the sponsor and has been modified by the PI which requires sponsor review and institutional signature.</td>
</tr>
</tbody>
</table>

Proposal Types in eProp identify the current stage of the project represented by the proposal or type of application.
2. COMPLETE GENERAL INFORMATION

1. Select the **Proposal Type** from the drop-down field.
2. Select the **Activity Type** from the drop-down field.
3. Type the proposal **Start Date** or click the calendar icon and select a date.
4. Type the proposal **End Date** or click the calendar icon and select a date.
5. Click the **Search** link next to the **Agency/Sponsor** field.
   
   **Note:** If the six-digit sponsor code is known, type it in the field and skip to step 8.

6. Complete one or more search criterion fields and then click **Search**.
7. Click the correct sponsor name or code.
   
   The Agency/Sponsor field populates with the corresponding code.
8. Click in the **Title** field and type the title of the FOA.
9. Click in the **Program Title** field and type the name of the FOA program, if available.
10. Click on the drop-down arrow of the **Proposal in Response** field and select the appropriate type, if available.
11. Click in the **Funding Opportunity Number** field, and then type the appropriate number, if available.
12. Click in the **CFDA Number** field, and then type the appropriate number, if available.
13. Click the **Save** button.

---

If entering information where WSU is receiving a sub-contract, include the following and **Save**:

1. Complete the **Agency/Sponsor** field with the name of the funding source.
2. Complete the **Prime Sponsor** if funding originated from another source.
3. Click the **Sub Contract** box so that a checkmark appears.
Create a Grant Proposal in Coeus

3. ORGANIZATION

The Organization screen automatically populates with Wayne State’s organization information. But, if an additional organization or performance site is applicable, do the following:

To Add an Organization:

1. Click the Organization link on the navigation pane.
2. Click the Add Organization/Location link.
3. Click the drop-down arrow of the Type field, and select Other Organization.
4. Click the Search.
5. Complete one or more search criterion, and then click the Search button.
6. Select the organization from the Search results.
7. Click the Save button.

To Add a Performance Site:

1. Click the Add Organization/Location link.
2. Click the drop-down arrow of the Type field, and select Performance Site.
3. Click in the Location field and type the name of the organization.
4. Click Find Address.
5. Complete one or more search criterion, and then click the Search button.
6. Select the organization from the Search results.
7. Click the Save button.
Create a Grant Proposal in Coeus

4. ADD INVESTIGATORS AND KEY PERSONS

1. Click the **Investigators/Key Persons** category on the navigation pane.

2. Click the **Employee Search** or **Non Employee Search** Link.
   The Person Search screen displays.

3. Complete one or more search criteria, and then click **Search**

Use an asterisk as a wild card if only partial name is known.

4. Click the **FULL NAME** of the person (or other data associated with the name).

The employee information will populate in the fields where matching data exists.

5. Select the appropriate role from the **Proposal Role** drop-down.
   (The value initially defaults to Principal Investigator since every proposal must have a principal investigator role assigned.)

   **Note:** If **Key Study Person** is selected, the **Key Person Role** field must be completed.

6. Click the **Save** button.

   The name will be displayed under the List of Investigators/Key Study Personnel section.
   *Repeat this process for each role that must be added.*
4. ADD INVESTIGATORS AND KEY PERSONS - CONTINUED

If an additional business unit is needed:

1. Under the List of Investigators/Key Study Personnel, click the Details link next to the person’s name for whom an additional business unit will be added.

2. Click the Add Unit link.

```
Person Details for Brown, Elizabeth
```

<table>
<thead>
<tr>
<th>Lead</th>
<th>Unit Number</th>
<th>Unit Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>H1205</td>
<td>Chemistry</td>
<td></td>
</tr>
</tbody>
</table>

3. Click Search.
   Note: If the unit number is known, it can be directly entered directly.

4. Enter the search criteria, and then click the Search button.

```
Please enter search criteria of the form 'value' or 'value or value' in any of search fields.
```

<table>
<thead>
<tr>
<th>Unit Number:</th>
<th>Unit Name: physics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Officer:</td>
<td></td>
</tr>
<tr>
<td>Dean VP:</td>
<td></td>
</tr>
<tr>
<td>Osp Administrator:</td>
<td></td>
</tr>
<tr>
<td>Other Ind To Notify:</td>
<td></td>
</tr>
</tbody>
</table>

5. Select the appropriate business unit from the search results.

6. Click the Lead radio button to designate the lead business unit.

```
Unit Details
```

<table>
<thead>
<tr>
<th>Lead</th>
<th>Unit Number</th>
<th>Unit Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>H1222</td>
<td>Physics</td>
<td></td>
</tr>
<tr>
<td>H1205</td>
<td>Chemistry</td>
<td></td>
</tr>
</tbody>
</table>

7. Click the Save button near the bottom of the screen.
Create a Grant Proposal in Coeus

5. ENTER CREDIT SPLIT INFORMATION

1. Click the Credit Split category on the navigation pane.
2. Click in the Recognition field for each Principal Investigator (PI) and Co-Investigator (Co-I) and type the percentage share credited to each person.
   Use whole numbers. For example, 100% is typed as 100 or 100.00
   The Investigator Total at the bottom of the page must equal 100.00 when complete.
3. Click in the Recognition field for each business unit listed and type the percentage share credited to each business unit.
   Each Unit Total must equal 100.00 when complete.
4. Click the Save button.

NOTE: Credit Split is NOT the same as Indirect Cost breakdown among PIs, Departments, Colleges. If Indirect Cost is shared, the breakdown must be communicated to your SPA Grant & Contract Officer.

6. ADD SPECIAL REVIEW INFORMATION FOR HUMAN SUBJECTS

1. Click the Special Review category on the navigation pane.
2. Select Human Subjects from the Special Review drop-down field.
3. Click in the Protocol No field and type the protocol number.
4. Type any relevant comments in the Comments field.
5. Click Save.
Create a Grant Proposal in Coeus

7. ADD ADDITIONAL SPECIAL REVIEW INFORMATION

1. Select the Special Review type from the Special Review drop-down field.
2. Select the Approval type from the Approval drop-down field.
   Note: If Human Subjects Pending is selected, Pending for Approval must also be selected.
3. If approval has been applied for, enter the date applied in the Application Date field.
4. If approval has been granted, enter the approval date in the Approval Date field.
5. Type any relevant comments in the Comments field.
6. Click Save.

8. COMPLETE YNQ (YES AND NO QUESTIONS)

1. Click the YNQ category on the navigation pane.
2. Read each question and select Yes or No.
3. If an Explanation field displays when selecting Yes, complete this field.
4. When all questions are answered, click Save.
   Note: Answers may be saved before all responses are complete.
9. PROPOSAL ROLES

1. Click the **Proposal Roles** category on the navigation pane.

   This information will automatically populate based on approval queue information for the business unit. **However, if additional proposal roles are needed, do the following:**

   2. Next to the role to be added, click the **Add User** link.

3. Complete one or more search criteria, and then click **Search**.

4. Select the correct name from the Search results.
10. UPLOAD ATTACHMENTS

1. Click the **Upload Attachments** category on the navigation pane.

2. Select the **Upload Institutional Attachments** tab.

3. Click the drop-down arrow of the **Attachment Type** field and select the correct attachment type.
   Typically one of the following two options should be selected:
   - **Completed Proposal Packet**: For grants not sponsored by Grants.GOV
   - **Grants.GOV Packet**: For grants sponsored by Grants.GOV
   Other attachments types may be selected.

4. Click the **Browse** button next to the **File Name** field and locate/select the attachment

5. Click the **Save** button.

The file is uploaded and saved.
20. ADD COST-SHARE INFORMATION (if applicable)*

1. Click the **Cost Sharing Distribution** link.

*Unless otherwise mandated by the sponsor, cost-share will occur when percentage of effort exceeds percentage charged.

---

**Enter** pertinent cost-share information and edit as necessary.

1. **Budget Period** based on number of periods in proposal budget
2. **Total Cost Sharing Amount** automatically populated based on Personnel Budget and Effort/Charged discrepancy.
3. Enter the percentage of cost-share for the period.
4. Enter/Edit amount. **Note:** that if additional cost-share is mandated for other portions of a budget, the percentage and amount can be adjusted.
5. Select **Add Cost Sharing Distribution** if multiple sources/amounts exist for a fiscal year.
6. Enter **Source Account** number for each fiscal year.
7. **Remove** entries as necessary
22. CERTIFY INVESTIGATOR/KEY PERSONNEL - CONTINUED

2. Select **Yes** or **No** for each question.

If **Yes** is selected an **Explanation** field may populate, which must be completed.

3. Click **Save**.
   
The Investigators/Key Persons screen will display with a green checkmark displayed next to the name of the person for whom the certification process is completed.

Repeat this process for all persons on the Investigators/Key Persons screen.

**Note**: Select the **Print Certification** button to print the questions and provide a hard copy to person who is responsible for answering the questions.

If this method is used and an electronic record is needed, the questions and answers provided can be scanned and uploaded. Do this on the **Upload Attachments** screen on the **Upload Institutional Attachments** tab. Select **Other Supporting Documents** as the Attachment Type.

It is also acceptable to keep a paper copy of the signed questions document as a permanent record. Whichever method is used, these records must be readily available in case they are needed for verification.

23. FINALIZE BUDGET

1. Click **Budget** on the left navigation panel.

2. Click the **Final** checkbox so that a checkmark appears.

3. Click the drop-down arrow of the **Budget Status** field and select **Complete**.

4. Click the **Save** button.

The fields on the screen are grayed out after saving.
24. VALIDATE PROPOSAL

1. Click the **Return to Proposal** link.
2. Click **Validate** in the left navigation panel.

A generated message stating that all validation rules were passed if there were no errors will be received. If there are errors in the proposal, an explanation of the errors will be received.

3. Click the **OK** button.

25. SUBMIT PROPOSAL

1. Click the **Submit for Approval** link.
2. Click the **OK** button.

Confirmation when successfully submitted.

3. Click the **OK** button.
Add a New Entity in Coeus

If search results do not yield pertinent information, a new entity (person, organization, or performance site) can be added to Coeus. However, the information will not automatically be added or displayed. After adding a new entity, a TBA placeholder must be used.

If the message stating “No rows found within the current selection criteria” is received as a result of an initial search, try other available search criteria before adding a new entity. Remember to use an asterisk (*) to perform a partial name wildcard search. Once it is determined that the person/organization/location is not in Coeus, the new entity can be added.

**ADD A PERSON**

*Create the add person request:*

1. Click the **Add Person** link.

2. Complete the required fields (marked by red asterisks).

3. Click the **Submit Request** button.

![Add Person Form]

*First Name:* Natecha  
*Last Name:* Jones  
*Suffix:*  
*Organization:*  
*Address:* 4000 Park Lane  
*City:* Detroit  
*State:* MI  
*Country:* United States  
*Phone:*  
*Email:*  
*Middle Name:*  
*Prefix:*  
*Title:*  
*County:*  
*Postal Code:* 48200  
*Fax:*  

Go Back
ADD A PERSON – CONTINUED

Select a TBA placeholder:

1. Click the **Search Again** link.

   Your request to add a new person has been received. Until your request has been processed, please search and use the name "TBA" as a temporary placeholder.

2. Click in the **First Name**, **Last Name**, or **Full Name** field and type **TBA**.
3. Click the **Search** button.

4. Select **TBA**.

5. Type or search for the appropriate **Business Unit**.
6. Click the **Save** button.
Add a New Entity in Coeus

ADD AN ORGANIZATION

Create the add organization request:

1. Click the Add Organization link.

The search could not be completed.

No rows found with the current selection criteria. If you would like to request that a record be added, please use the Add Organization form.

Go Back

2. Complete the required fields (marked by red asterisks).

3. Click the Submit Request button.
Add a New Entity in Coeus

ADD AN ORGANIZATION - CONTINUED

Select a TBA placeholder:

1. Click the **Search Again** link.

   Your request to add a new organization has been received. Until your request has been processed, please search for and use the organization name "TBA" as a temporary placeholder.

   ![Search Again](image)

2. Click in the **Name** field and type **TBA**.

3. Click the **Search** button.

   Please enter search criteria of the form "value" or "value or value" in any of search fields.

   ![Search](image)

4. Select **TBA**.

   ![Organization Search Result](image)

5. Click the **Save** button.

   ![Save](image)
Add a New Entity in Coeus

ADD A PERFORMANCE SITE (LOCATION)

Create the add performance site request:

1. Click the **Add Performance Site** link.

   The search could not be completed.

   No rows found with the current selection criteria. If you would like to request that a record be added, please use the **Add Performance Site** form.

   Go Back

2. Complete the required fields (marked by red asterisks).
3. Click the **Submit** Request button.
ADD A PERFORMANCE SITE (LOCATION) - CONTINUED

Select a TBA placeholder:

1. Click the **Search Again** link.

   Your request to add a new performance site has been received. Until your request has been processed, please search for and use the performance site contact name “TBA” as a temporary placeholder.

   ![Search Again](image)

2. Click in the **First Name**, **Last Name**, or **Sponsor Name** field and type **TBA**.

3. Click the **Search** button.

4. Select a **TBA**.

   ![Rolodex](image)

5. Click in the **Location** field and type the organization name.

6. Click the **Save** button.
Search Functions in Coeus

This job aid explains the search functionality in Coeus used to locate a person, organization, or performance site. In each instance, launch the search, enter search criterion, select the correct result, and eventually save.

The search functions in Coeus work very similarly. What differs is the location and name of the link that launches the search, and the search criterion.

The following demonstrates search steps for different entities.

**EMPLOYEE SEARCH**

Investigators/Key Persons: Employee Search  
Personnel Roster: Add Employee

1. Click the **Employee Search/Add Employee** link.

2. Complete the search criterion.

3. Click the **Search** button.

4. Select the appropriate search result.

5. Click **Save**.
Search Functions in Coeus

NON EMPLOYEE SEARCH/ADD A NON EMPLOYEE
Investigators/Key Persons: Non Employee Search
Personnel Roster: Add Non Employee

1. Click the **Non Employee Search/Add Non Employee** link.

2. Complete the search criterion.

3. Click the **Search** button.

4. Select the appropriate search result.

5. Click **Save**.
SEARCH FOR AN ORGANIZATION/ADD ORGANIZATION

1. Click the **Organization** link on the navigation pane.
2. Click the **Add Organization/Location** link.
3. Click the drop-down arrow of the **Type** field, and select **Other Organization**.
4. Click the **Search**.
5. Complete one or more search criterion, and then click the **Search** button.
6. Select the organization from the Search results.
7. Click the **Save** button.
Search Functions in Coeus

SEARCH FOR A PERFORMANCE SITE/ADD LOCATION

Organization: Add Organization/Location

1. Click the Add Organization/Location link.

2. Click the drop-down arrow of the Type field, and select Performance Site.

3. Click in the Location field and type the name of the organization.

4. Click Find Address.

5. Complete one or more search criterion, and then click the Search button.

6. Select the organization from the Search results.

7. Click the Save button.
**Search Functions in Coeus**

## ADD USER

Proposal Roles: Add User

1. Click the **Add User** link.

2. Enter the search criterion and then click **Search**.

3. Select the appropriate search result.

The user is added.
**Search Functions in Coeus**

**ADD TBA**

Personnel Roster: Add TBA

1. Click the **Add TBA** link.

   **Budget Personnel**

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Code</th>
<th>Appointment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown, Elizabeth</td>
<td>P5</td>
<td>SUM EMPLOYEE</td>
</tr>
<tr>
<td>Brown, Elizabeth</td>
<td>A9</td>
<td>9M DURATION</td>
</tr>
<tr>
<td>Johnson, Ava</td>
<td>A9</td>
<td>9M DURATION</td>
</tr>
</tbody>
</table>

   **Add Employees | Add Non Employee | Add TBA**

2. Select the appropriate TBA category.

   **TBA Persons**

<table>
<thead>
<tr>
<th>TBA Id</th>
<th>Name</th>
<th>Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TBA - Clerical</td>
<td>SA</td>
</tr>
<tr>
<td>2</td>
<td>TBA - Early Retirees</td>
<td>FR</td>
</tr>
<tr>
<td>3</td>
<td>TBA - Executive/Management</td>
<td>MA</td>
</tr>
<tr>
<td>4</td>
<td>TBA - Facilities Personnel</td>
<td>PS</td>
</tr>
<tr>
<td>5</td>
<td>TBA - Faculty</td>
<td>FA</td>
</tr>
<tr>
<td>6</td>
<td>TBA - Graduate Students</td>
<td>U9</td>
</tr>
<tr>
<td>7</td>
<td>TBA - Hourly Part-Time Faculty</td>
<td>HP</td>
</tr>
</tbody>
</table>

3. Click **Save**.

   **Budget Personnel**

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Code</th>
<th>Appointment Type</th>
<th>Eff Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown, Elizabeth</td>
<td>P5</td>
<td>SUM EMPLOYEE</td>
<td>10/01/2010</td>
</tr>
<tr>
<td>Brown, Elizabeth</td>
<td>A9</td>
<td>9M DURATION</td>
<td>10/01/2010</td>
</tr>
<tr>
<td>Johnson, Ava</td>
<td>A9</td>
<td>9M DURATION</td>
<td>10/01/2010</td>
</tr>
<tr>
<td>TBA - Graduate Students</td>
<td>U9</td>
<td>ROE EMPLOYEE</td>
<td>10/01/2010</td>
</tr>
</tbody>
</table>

   **Add Employees | Add Non Employee | Add TBA**

   **Save**
Search Functions in Coeus

SEARCH TIPS TO REMEMBER

• A search can be conducted with as little as one search criterion.
• The more criterion used, the narrower the search results.
• To search using a partial name (or other partial search data) add an asterisk to the end of the search data, e.g., mich* for a name containing Michigan.
• Click Go Back to perform another search using adjusted search criterion.
• If search results do not yield the person/organization/site, information can be added in Coeus. See the Add a New Entity in Coeus job aid for detailed information.
Use this job aid to properly note an appointment period that will be split, such as an academic (9-month) period that will be interrupted by a summer (3-month) period.

Note: This procedure would never apply to a calendar (12-month) employee.

1. **VERIFY THAT ALL APPOINTMENT TYPES ARE ADDED TO THE PERSONNEL ROSTER**

   If a person will have two appointments under the grant proposal, such as a 9-month academic and a 3-month summer appointment, there must first be a line added for each of these appointments on the Personnel Roster screen.

   1. Under Budget Setup, click the **Personnel Roster** link.
   2. To add an appointment, click the **Add Employee** link.

   **Budget Personnel**

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Code</th>
<th>Appointment Type</th>
<th>Eff Date</th>
<th>Base Salary</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown, Elizabeth</td>
<td>A9</td>
<td>9M DURATION</td>
<td>10/01/2010</td>
<td>$83,200.00</td>
<td>Remove</td>
</tr>
<tr>
<td>Johnson, Ava</td>
<td>A9</td>
<td>9M DURATION</td>
<td>10/01/2010</td>
<td>$83,200.00</td>
<td>Remove</td>
</tr>
</tbody>
</table>

   **Add Employee** | **Add Non Employee** | **Add TBA**

   **Save**

   3. Complete at least one search criteria, and then click the **Search** button.
   4. Select the correct person from the search results.
   5. If it is not populated correctly, type the correct **Job Code** for the appointment.
      
      - **A9** for 9M DURATION
      - **P5** for SUM EMPLOYEE
   6. Select the appropriate **Appointment Type** from the drop-down list.
   7. Click in the **Base Salary** field, and then type the salary that applies only to the period you have selected.

   **Budget Personnel**

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Code</th>
<th>Appointment Type</th>
<th>Eff Date</th>
<th>Base Salary</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown, Elizabeth</td>
<td>A9</td>
<td>9M DURATION</td>
<td>10/01/2010</td>
<td>$83,200.00</td>
<td>Remove</td>
</tr>
<tr>
<td>Johnson, Ava</td>
<td>A9</td>
<td>9M DURATION</td>
<td>10/01/2010</td>
<td>$83,200.00</td>
<td>Remove</td>
</tr>
<tr>
<td>Brown, Elizabeth</td>
<td>P5</td>
<td>SUM EMPLOYEE</td>
<td>10/01/2010</td>
<td>$27,733.33</td>
<td>Remove</td>
</tr>
</tbody>
</table>

   **Add Employee** | **Add Non Employee** | **Add TBA**

   **Save**

Repeat this process for each appointment type under which the person will be working.
2. NOTE A SPLIT APPOINTMENT ON THE PERSONNEL BUDGET SCREEN

This is how a split is noted on the Personnel Budget screen. In this scenario an academic (9-month) employee will be working for a 9-month period, but the 9 months are not consecutive. The period must be split in the budget to reflect the ACTUAL dates being worked.

This procedure assumes that the budget personnel from the Personnel Roster will be added, and the other required fields for each person listing will be completed. Add both the 9-month and summer appointments.

See the Enter Personnel Budget Information section of the Create a Grant Proposal in Coeus for instructions on how to do complete these tasks.

Begin on the Personnel Budget screen under Budget Periods screen.

ADD ONE PERSON AT A TIME, ONE ASSIGNMENT AT A TIME, EACH ASSIGNMENT ADDED IN CHRONOLOGICAL ORDER. THIS WILL HELP TO KEEP PERIOD DATES ACCURATE AND SALARY AMOUNTS IN LINE WITH THE BUDGET. WHEN ADDING AN ACADEMIC PERIOD:

1. Click Add Person

2. Select the appropriate person and period. Remember to choose only one at a time.

3. Click the Save button.

4. Verify that the Salary Type is listed as Faculty.

5. Click in the Start Date field, and then either type or use the calendar to enter the date on which the academic period initially begins.

6. Click in the End Date field, and then enter the date on which the regular academic year ends.
WHEN ADDING A SUMMER PERIOD

1. Click Add Person.

2. Select the appropriate person and period. Remember to choose only one at a time.

3. Click the Save button.

4. Verify that the Salary Type is listed as Summer Faculty.

5. Click in the Start Date field, and then enter the date on which the summer period begins.

6. Click in the End Date field, and then enter the date on which the summer period ends.

The Academic Period is 8/15 – 5/14
The Summer Period is 5/15 – 8/14
2. NOTE A SPLIT APPOINTMENT ON THE PERSONNEL BUDGET SCREEN - CONTINUED

ADD A LISTING SO THAT YOU MAY ACCOUNT FOR THE REST OF THE 9-MONTH ACADEMIC PERIOD.

THIS WILL BE DONE THE SAME WAY AS THE PREVIOUS ACADEMIC PERIOD, ONLY THE START AND END DATES WILL DIFFER.

1. Add the same person to the Personnel budget using the same basic procedure as in the Search Functions in Coeus job aid.
2. Verify that the Salary Type is listed as Faculty.
3. Verify that the Period is listed as Academic.
4. Click in the Start Date field, and then enter the date on which the academic period resumes.
5. Click in the End Date field, and then enter the date on which the regular academic period ends.
6. When finished adding all assignments, click the Save button.

The calendar time for both academic periods combined will total the full 9 months.

There will be one line in the Personnel Budget for the Summer period, and two lines for the Academic period because it is split in actual time and cannot encompass dates that are not being worked under the academic period.

AN EXAMPLE OF A BREAK IN AN APPOINTMENT PERIOD

SCENARIO:
A faculty member will be working on a study for the academic (9-month) and summer (3-month) periods. The start date of the study is January 1, 2009.

Because of that, the period dates are arranged as follows:

THE FIRST PORTION OF THE 9-MONTH ACADEMIC PERIOD:
Start Date: 01/01/09  End Date: 05/14/09
The Start Date is the day the study begins.
The End Date represents the last day of the regular academic year, before the summer period begins.

THE 3-MONTH SUMMER PERIOD:
Start Date: 05/15/09  End Date: 08/14/09
The Start Date is the first day of the Summer period.
The End Date is the last day of the summer period.

THE SECOND PORTION OF THE 9-MONTH ACADEMIC PERIOD:
Start Date: 08/15/09  End Date: 12/31/09
The Start Date is the first day of the regular academic year after the summer period ends.
The End Date represents the last day of the study in the calendar year.

Because the 9-month academic period is split in actual time, this is how the appointment periods must be reflected in the Personnel Budget: 3 separate appointment periods.

This example includes a summer appointment, but even if the person does not have a summer appointment, the academic assignment must still reflect real calendar dates.
Use this job aid to create a budget in Coeus.

1. NAVIGATE TO THE BUDGET SCREENS
   1. Click the Budget category on the navigation pane.
   2. Click Yes when asked to create a new budget.
   3. If a PI or Co-I has multiple appointments the relevant appointment must first be selected on the Multiple Appointments screen.

   The PI and Co-I names will automatically populate on the Personnel Roster screen.

2. PERSONNEL ROSTER
   1. To add additional budget personnel, click the appropriate link.
      a. Click Add Employee to add a university employee.
      b. Click Add Non Employee to add a person who is not employed by the university.
      c. Click Add TBA to add as yet unidentified personnel to the budget.

      There is no search criterion for a TBA. A list of TBA options displays once you click Add TBA.

      The Person Search screen displays when you click Add Employee or Add Non Employee.
      2. Type one or more search criteria, and then click Search.
      3. Click the FULL_NAME of the person (or other data associated with the name).

      The employee information will populate in the fields where matching data exists.

      Repeat this process for any personnel that must be added.

      Note: If a person will be working on a grant from multiple appointments, all affected appointments must be added. For example, an employee with a 9-month appointment and a summer duration appointment must appear on the screen twice, once for each appointment type.

   4. Click on the drop-down arrow of the Appointment Type field and select the appropriate appointment type, if it is not already displayed.
   5. Click in the Base Salary field for each name that displays and type the person’s base salary.
   6. Click the Save button.
Create a Budget

3. ADJUST PERIODS

To change the period length/dates of any period:

1. Click the Adjust Periods category under the Budget Set Up heading, which populate as initially set up in the budget.
2. Click in the Start Date and End Date fields and enter the appropriate dates, or use the calendar icon.
3. Click Save.

![Adjust Period Boundaries table]

4. PROPOSAL RATES

1. Click the Proposal Rates category under the Budget Set Up heading. Default values populate.

To adjust rates:

1. Click in the Applicable Rate field for any Rate Type and overtype the data to reflect the correct rate.

*If necessary, only update the F&A and/or Inflation Rates.*

MTDC: Modified Total Direct Costs/Indirect Costs/F&A

Inflation: Salary and Tuition inflation rates

2. Click Save.
5. ENTER PERSONNEL BUDGET INFORMATION

1. Click the **Personnel Budget** category under the Budget Periods heading.

2. Click the **Add Person** link.

3. Select each person to include in the budget by clicking the **checkbox** next to his or her name. To select every person listed, click the checkbox in the blue header.

4. Click the **Save** button.

Each name selected displays with budget information fields, and with the Start Date and End Date automatically populated.

**Note:** If a person has an academic (9-month) appointment period and it will be interrupted by a summer period, the 9-month assignment must be split to reflect the actual dates. Please see the **Split Assignment** job aid for more details.
Create a Budget

Then do the following for each person listed on Personnel Budget the screen:

1. Click the drop-down arrow of the Salary Type field and select the correct salary type.
2. If the Period needs to be changed, click the drop-down arrow of the Period field and select the correct period. Options are:
   - Academic (9 months)
   - Calendar (12 months)
   - Summer (3 months)
3. Click in the % Charged field and type the percentage of the individual’s time that will be charged to the project in whole numbers. Ex. 10% = 10.00
4. Click in the % Effort field and type the percentage in whole numbers. Ex. 10% = 10.00. This can be more, not less, than the Charged percentage. The difference will be cost sharing.
5. To adjust a Start Date or End Date, click in the field and overtype the date, or click the Calendar icon next to the field and select the appropriate date.

   **F.Y.I.**
   The Academic period is 8/15 – 5/14
   The Summer period is 5/15 – 8/14

6. Click the Save button.

   **F.Y.I.**
   If another person is to be added to the personnel budget, follow the procedure to add a person, and begin by clicking the Add Person link.
Create a Budget

6. ADD EQUIPMENT

Please note that only equipment that costs $5000 or greater should be noted here.

1. Click the **Equipment** category under the Budget Periods heading.
2. Click the drop-down arrow of the **Equipment** field and select **Equipment**.
3. Click in the **Description** field and type a clear description of the equipment.
4. Click in the **Funds Requested ($)** field and type the amount of funds requested for the equipment.
   
   Click on the **Add Equipment** link and repeat this process for any equipment at or over $5000 that must be added.

   **FYI.** Pieces of equipment must be added individually.

5. Click the **Save** button when all equipment has been added.
7. ADD TRAVEL EXPENSES

1. Click the **Travel** category under the **Budget Periods** heading.

2. Click the drop-down arrow of the **Type** field and select the type of travel.  
   - **Foreign** (Outside of the U.S.)
   - **Instate** (Michigan)
   - **Outstate** (Other U.S states)

3. Click in the **Description** field and type a clear description of the travel expenses.

4. Click in the **Funds Requested ($)** field and type the amount of funds requested for the travel expenses.
   - Click on the **Add Travel** link and repeat this process for any travel expenses that must be added.

5. Click the **Save** button when all travel expenses have been added.
8. ADD OTHER DIRECT COSTS
1. Click the Other Direct Costs category under the Budget Periods heading.
2. Click the drop-down arrow of the Type field and select the type of cost.
3. Click in the Description field and type a clear description of the item.
4. Click in the Funds Requested ($) field and type the amount of funds requested for the item.
   Click on the Add Direct Costs link and repeat this process for any direct costs that must be added.
5. Click the Save button when all other direct costs have been added.

9. GENERATE ALL PERIODS
1. Click the Generate All Periods link.
   ! Note: This can only be done once.
2. Click the Generate Periods link. A message that all periods have been generated will populate.
10. MODIFY INFORMATION IN GENERATED PERIODS

Remember: The budget information from period 1 is copied to the additional generated periods, and inflated.

Any information that affects the newly generated periods in the following Budget Period categories must be Added or Removed:
- Personnel Budget
- Equipment
- Travel
- Other Direct Costs
- Modular Budget (See the Modular Budget job aid for further details.)

1. Click the link of any budget period category. For example, to change information in the Equipment category, click the Equipment category under the Budget Periods menu.

Any Budget Period screen will always default to Period 1 when first clicked.

2. Select the correct budget Period tab.

3. Modify the information using the same procedures used to set up the first budget period.

4. Save all changes before navigating away from the screen.

11. FINALIZE BUDGET

1. Click Budget Summary on the left navigation panel.
2. Click the Final checkbox so that a checkmark appears.
3. Click the drop-down arrow of the Budget Status field and select Complete.
4. Click the Save button.

The fields on the screen are grayed out after saving.
Create a Modular Budget

Use this job aid to create a modular budget in Coeus. In order to create a Modular Budget, a number of budget components must be completed. However, there is no need to complete a detailed budget. The following sections must be competed, if funds are anticipated:

- **Personnel Budget** – Key Personnel identified previously must be budgeted for their proposed level of effort
- **Equipment** – Any piece of equipment must be listed
- **Subaward / Consortium** – each subaward must be listed with their proposed budget
- Any other Exclusions from Indirect Cost, i.e Tuition, Alterations and Renovations, should be captured within the Other Direct Costs pane

Completing the Modular budget:

1. Click the **Budget Summary** link on the navigation page.

2. Click the box for **Modular Budget**.

3. Complete the **Personnel** for key personnel and **Other Direct Costs** for tuition, sub-awards and other exclusions from the F&A calculation.

4. If there are multiple years to be defined, click on the **Generate All Periods** pane and follow instructions to generate the subsequent year’s budgets.

5. If there is equipment or subawards/consortium costs to be entered, enter those amounts in the respective periods.

6. Click the **Modular Budget** link on the navigation pane.

7. Under Direct Costs, click in the **Direct Cost less Consortium F&A** field and type the appropriate amount. *This amount must be in increments of $25,000.*
Create a Modular Budget

8. Click in the **Consortium F&A** field and type the appropriate amount. This amount should be equal to the subcontract organization’s indirect costs.

9. Click the **Add Indirect Cost** link.

10. Under Indirect Costs, click in the **Indirect Cost Type** field and type the description of the indirect cost type.
    - MTDC: Modified Total Direct Costs. Use this for NIH.
    - TDC: Total Direct Costs.

11. Click in the **IDC Rate (%)** field and type Wayne State’s current F&A rate in whole numbers.

12. Click in the **IDC Base** field and type the appropriate amount:
    - **IDC Base** = **Direct Cost** – **Equipment** – **Tuition** – **Patient Care** – **Sub Awards/Consortium over 25k**
    All of these variables may not be in the proposal but, if so, they must be subtracted to calculate the IDC base.

**Remember:** Sub Award Consortium costs over $25k may not show up until later periods.

13. Click in the **Funds Requested** field and type the appropriate amount.
    - This amount is the **IDC Rate** x the **IDC Base**.
    - Multiply the rate as a decimal percentage.
      For example, if the rate is 52, enter 52 in the IDC Rate field, but multiply the IDC Base by 0.52 to calculate the Funds Requested value.

14. Click the **Save** button.

Repeat this process for any additional generated periods.
**Add Tuition Costs**

Use this job aid to add tuition costs to a grant budget in Coeus.

### 1. ADD THE GRAD STUDENT TO THE PERSONNEL ROSTER

First make certain to add the graduate student on the Personnel Roster screen. This can be done when adding all personnel to the roster. 

(Click the **Personnel Roster** link on the navigation pane to access this screen.) If the graduate student is identified:

1. Click the **Add Employee** link.
2. Complete at least one search criteria, and then click **Search**.
3. Select the appropriate person from the search results.
4. Click in the **Job Code** field and type the appropriate job code.
5. Select the correct **Appointment Type**.
6. Click in the **Base Salary** field and type the salary inflated by 4%.
7. Click **Save**.

If the graduate student is to be announced (TBA):

1. Click the **Add TBA** link.
2. Select **TBA – Graduate Students** from the list.
3. Click in the **Job Code** field and type the appropriate job code.
4. Select the correct **Appointment Type**.
5. Click in the **Base Salary** field and type the budgeted salary.
6. Click **Save**.
Add Tuition Costs

2. ADD THE TUITION COSTS UNDER OTHER DIRECT COSTS

Then also add the costs into the budget on the Other Direct Costs screen. (Click the Other Direct Costs link on the navigation pane to access this screen.) For each period in the budget to which tuition applies:

1. Click the Add Direct Costs link to add a new line, if needed.
2. Click the drop-down arrow of the Type field, and then select Tuition.
3. Click in the Description field, and then type a brief description of the tuition costs.
   Example: 10 cr hrs F & W, 2 cr hrs S/S for 1 GA
4. Click in the Funds Requested field, and then type tuition amount requested for the period.
5. Click Save.

When Coeus calculates total indirect costs, it automatically excludes tuition costs.
Consortium Funds

Use this job aid to note Sub Award Consortium funds for a grant in Coeus.

For each grant, Wayne State University is allowed to recover indirect costs up to $25,000 for each Sub Award/Consortium. Beyond that, the university is not allowed to recover indirect costs on that amount. For this reason these costs must be separated once the $25k threshold is reached.

Subaward/Consortium costs are entered per period. However, the $25,000 recoverable limit is for all periods combined, not for each individual period. Subaward/Consortium budgets are recorded under the “Other Direct Costs” portion of the budget.

1. FOR SUBAWARD/CONSORTIUM COSTS UNDER $25K
   1. Click the drop-down arrow of the Type field and select Subawards/Consortium under $25k
   2. Click in the Description field and type the name of the subaward/consortium institution.
   3. Click in the Funds Requested ($) field and type the dollar amount up to $25,000.

2. FOR SUBAWARD/CONSORTIUM COSTS OVER $25K
   1. Click the drop-down arrow of the Type field and select Subawards/Consortium over $25k.
   2. Click in the Description field and type the name of the subaward/consortium institution.
   3. Click in the Funds Requested ($) field and type the dollar amount that represents the amount in the given period beyond the $25,000 allowed per grant in the under $25K category.
   4. Click the Save button.

---

Budget Other Direct Costs

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subawards/Consortium under $25K</td>
<td>The University of Michigan</td>
<td>$25,000.00</td>
</tr>
</tbody>
</table>

Total Other Direct Costs: $25,000.00

Budget Other Direct Costs

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subawards/Consortium under $25K</td>
<td>The University of Michigan</td>
<td>$25,000.00</td>
</tr>
<tr>
<td>Subawards/Consortium over $25K</td>
<td>The University of Michigan</td>
<td>$10,000.00</td>
</tr>
</tbody>
</table>

Total Other Direct Costs: $35,000.00

Save
EXAMPLE 1:

<table>
<thead>
<tr>
<th>PERIOD 1</th>
<th>PERIOD 2</th>
<th>PERIOD 3</th>
<th>TOTAL SUBAWARDS/CONSORTIUM COSTS FOR ALL PERIODS: $65,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUBAWARD/CONSORTIUM COSTS: $30,000</td>
<td>SUBAWARD/CONSORTIUM COSTS: $20,000</td>
<td>SUBAWARD/CONSORTIUM COSTS: $15,000</td>
<td>SUBAwards/CONsortium Costs for all Periods: $65,000</td>
</tr>
<tr>
<td>Subaward/Consortium under $25k: $25,000</td>
<td>Subaward/Consortium under $25k: n/a</td>
<td>Subaward/Consortium under $25k: n/a</td>
<td>Total Subaward/Consortium under $25k: $25,000</td>
</tr>
<tr>
<td>Subaward/Consortium over $25k: $5,000</td>
<td>Subaward/Consortium over $25k: $20,000</td>
<td>Subaward/Consortium over $25k: $15,000</td>
<td>Total Subaward/Consortium over $25k: $40,000</td>
</tr>
</tbody>
</table>

EXAMPLE 2:

<table>
<thead>
<tr>
<th>PERIOD 1 SUBAWARD/CONSORTIUM COSTS: $15,000</th>
<th>PERIOD 2 SUBAWARD/CONSORTIUM COSTS: $15,000</th>
<th>TOTAL SUBAWARDS/CONSORTIUM COSTS FOR ALL PERIODS: $30,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subaward/Consortium under $25k: $15,000</td>
<td>Subaward/Consortium under $25k: $10,000</td>
<td>Total Subaward/Consortium under $25k: $25,000</td>
</tr>
<tr>
<td>Subaward/Consortium over $25k: n/a</td>
<td>Subaward/Consortium over $25k: $5,000</td>
<td>Total Subaward/Consortium over $25k: $5,000</td>
</tr>
</tbody>
</table>

The total Subaward/Consortium under $25k should never exceed $25,000 for a budget.

When a Subaward/Consortium situation is present, it should also be noted in the Organization pane in the Proposal screens. Each Subaward / Consortium should be added as a Performance Site.

ADD A PERFORMANCE SITE

1. Navigate to the Organization pane. From the Budget screen, click Return to Proposal, and then click the Organization link.
2. Click the Add Organization/Location link.
3. Click the drop-down arrow of the Type field and select Performance Site.
4. Click in the Location field and type the name of the organization.
5. Click the Find Address link and enter search criteria for the organization.
6. Click Search and select the organization from the search results.
7. Click the Save button.
Approval Routing for a Coeus Proposal

This job aid will give overview of the approval process in Coeus. For instructions on how to approve a proposal, please see the Proposal Approval job aid.

WHAT TO KNOW FIRST

When a proposal in Coeus is submitted for approval, it must be approved internally before it can be sent to the sponsor for approval. An approval routing queue is established for your department.

Once a proposal has been sent for approval, no changes can be made to the proposal unless it is internally rejected and sent back for changes.

Any proposal submitted for approval will typically progress through these stages of the routing queue:

1. Department chair
2. Dean or Head of college/division
3. SPA

There may be multiple levels/approvers within each of these stages.

Though this is the typical set-up for approval routing, some routing queues may differ as they can be customized for each department.

Note: If there is a Co-Investigator listed on the proposal from another department, the proposal will be sent to their department chair along with the Principal Investigator’s department chair.
Approval Routing for a Coeus Proposal

CHECK FOR OUTSTANDING APPROVALS OR OTHER ACTION REQUIRED

There is mailbox built into Coeus for each user, which can be accessed by clicking the Inbox link near the top of the page. The Coeus Inbox should be regularly checked.

VIEW MESSAGES IN YOUR INBOX

- When action is required, a message will generate in the Coeus Inbox.
- The messages are prioritized by due date with the help of colored flags.

A red flag is the highest priority as the approval deadline is within two days.
A yellow flag indicates that the approval deadline is within four days.
A green flag indicates that the approval deadline is within ten days.

DETERMINE REQUIRED ACTION

To determine the necessary action to take on a proposal, if any, view the message. The message indicates action required.
**Approval Routing for a Coeus Proposal**

**NAVIGATE TO A PROPOSAL TO REVIEW FOR ACCEPTANCE**

To go to the proposal from the inbox, simply click the Proposal Title or the Proposal Number.

<table>
<thead>
<tr>
<th>Proposal Title</th>
<th>Proposal Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploration of Research</td>
<td>00000272</td>
</tr>
<tr>
<td>Dissemination</td>
<td></td>
</tr>
<tr>
<td>Testing Proposal Refresh</td>
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<td>Testing Proposal Refresh</td>
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<tr>
<td>Exploration of Research</td>
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<td>Dissemination</td>
<td></td>
</tr>
<tr>
<td>clean names</td>
<td>00000256</td>
</tr>
</tbody>
</table>

**VIEW PROPOSAL INFORMATION**

When the Proposal Title or Proposal Number is clicked from the Inbox, the Summary page populates. It provides basic proposal and budget information.

Do the following from this screen:

1. Navigate to the Proposal Details screen to view proposal details.
2. Navigate to the proposal routing queue.
3. Approve or Reject the proposal, if a primary or alternate approver on the proposal.
4. View additional budget details by using the links under the Budget Report heading.
APPROVE A PROPOSAL

Click the Approve link to approve the proposal.

The approval screen populates.

Type any comments that must be included on the Comments field, and then click Add.

Click the Browse button to locate a document to attach to the proposal. This is optional.

A description of the attachment(s) can be entered in the Description field. Click the Add button below.

Once all comments, attachment, and descriptions are complete, click the Approve button.
REJECT A PROPOSAL
Click the **Reject** link to reject the proposal.

Type any comments that must be included on the Comments field, and then click **Add**.
Make sure to specify the reasons for rejecting the proposal in the Comments field.

Click the **Browse** button to locate a document to attach to the proposal. This is optional.

Type a description of the attachment(s) in the Description field, and then click the **Add** button below.

Once all comments, attachment, and descriptions are complete, click the **Reject** button.
Submit a Proposal for Approval

Once all required information for a proposal is completed, submit the proposal for approval by clicking the **Submit for Approval** link.

An explanation of errors to correct, if any, will generate:

Click the OK button to return to the proposal and correct the errors.

If there are no errors, a validation message stating all rules were passed successfully will populate.

Click **OK** before the proposal is actually submitted.
Approval Routing for a Coeus Proposal

VIEW THE APPROVAL QUEUE FOR YOUR SUBMITTED PROPOSAL

Once a proposal has been successfully submitted in Coeus, it can be viewed in the approval queue by clicking the Approval Routing link. This link will appear on the menu only after a proposal has been successfully submitted.

The routing queue displays with a list of required approvals.

- The approvals must be completed in order from the bottom up.
- As each tier of approval is completed, the next tier will be notified that approval is required.
- Once all tiers have approved the proposal, the proposal may be sent to the sponsor for consideration.
- If any person in the approval queue rejects the proposal, the proposal is returned with the reasons for rejection.

The legend at the bottom of the routing queue page explains what the symbols next to each name in the routing queue.