Kuali Coeus Minimum Requirements for Proposal Routing
Quick Reference Card

Overview:

The following are minimum requirements for routing a proposal for approval using Kuali Coeus. In addition to the KC requirements listed, ensure your proposal meets the requirements of your sponsor, opportunity, and DLC. For proposals developed in Kuali Coeus containing a detailed budget (line item detail, please refer to Preparing and Submitting a Proposal for submission requirements and instructions.

Procedure:

1. Log into **Kuali Coeus**, click **Create Proposal** link from the **KC Home** screen located in the **Pre-Award Menu** Group.

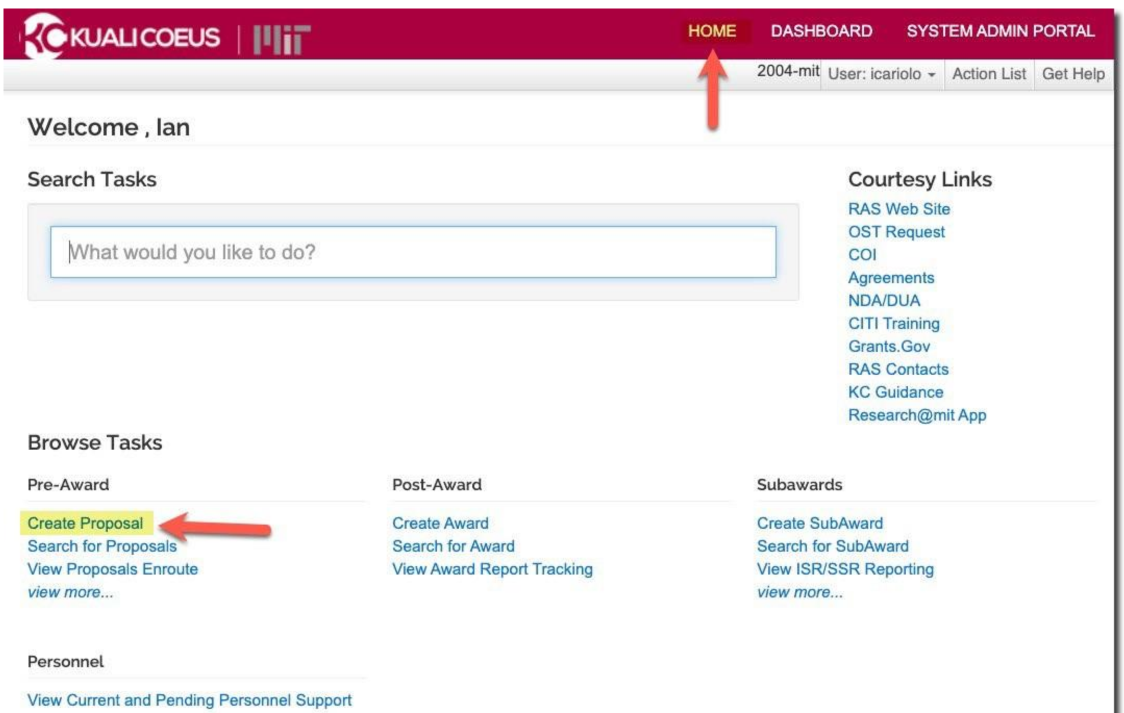
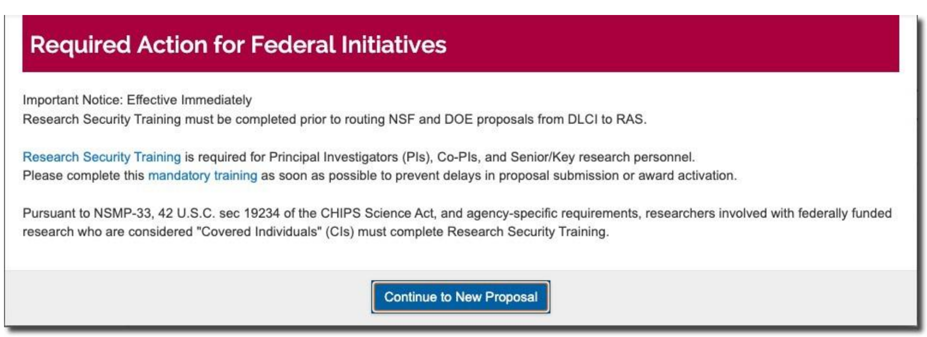


Figure 1 – Accessing the Create Proposal Link

2. After clicking the **Create Proposal** link, the **Required Action for Federal Initiatives** pop up window display, with helpful information and links to resources for Federal Initiatives. Click **Continue to New Proposal.**



The initial **Create Proposal** page will open. This page includes the required information needed to access the rest of the proposal development document. Once each of these fields have been completed, click **Save and Continue**.

3. A pop-up window will appear, enter all the required information. The required fields will have a red asterisk next to the field name

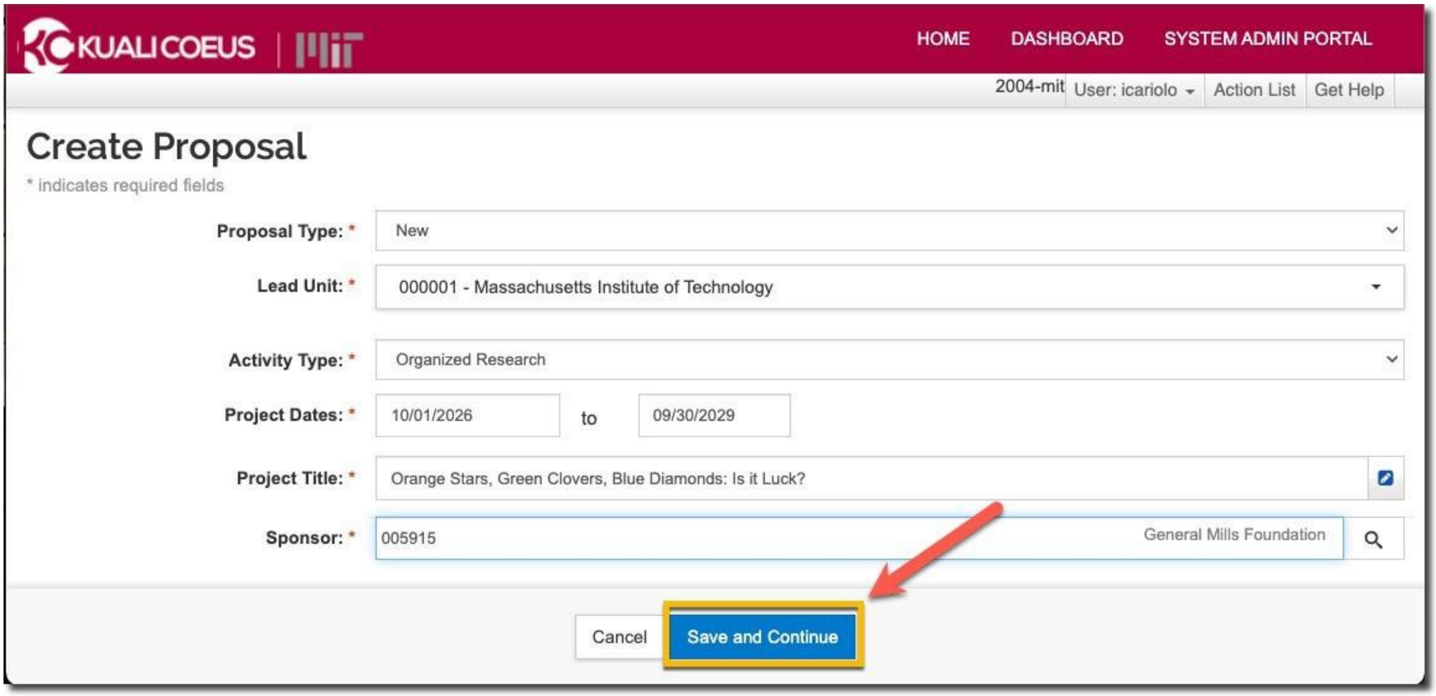


Figure 4 Completed Create Proposal Page

Note: These fields will prepopulate the next screen. Additionally, the **Lead Unit** field cannot be modified once **Save and Continue** has been clicked, so check this field for accuracy before navigating to the next screen.

Required Field Name	Description
1 Proposal Type	Select the appropriate type from the drop-down list. This information may be specified in the sponsor's announcement or guidelines
2 Activity Type	Select the appropriate entry from the drop-down list
3 Project Dates	Enter the date the project is expected to start and the date the project is expected to end. Use the **mm/dd/yy** format or the Calendar tool to select the date.
4 Project Title	Enter a descriptive title. For electronic submission, the Title cannot contain special characters. 200-character maximum; individual sponsors may require shorter titles. Refer to the sponsor instructions
5 Sponsor	**Agency/Sponsor** is the organization providing funding. Enter sponsor's 6-digit code or click **Search** to find it.

Table 1 Required Fields for Saving a Proposal

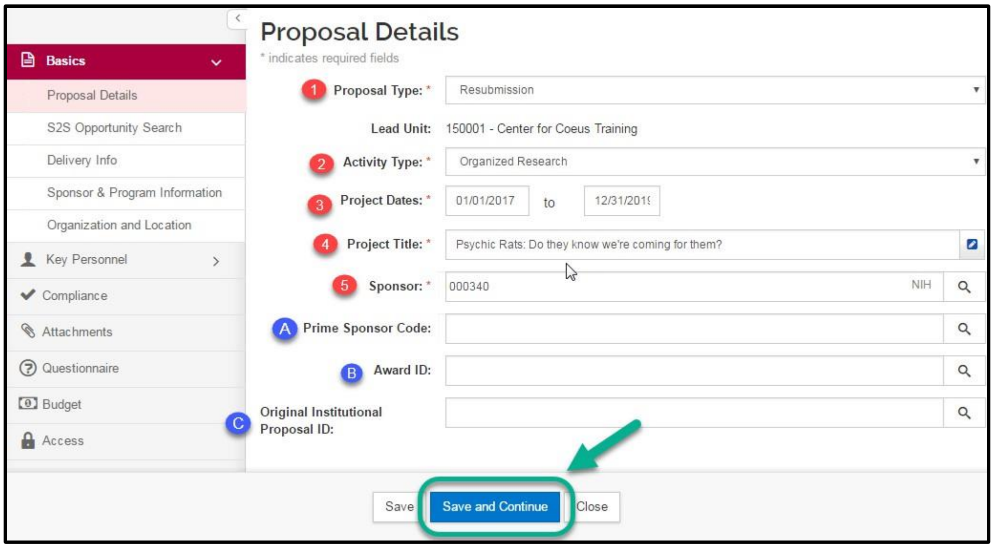


Figure 5 – Proposal Details Screen

Note: Unlike the previous screen, the Prime Sponsor Code field is now available.

Required Field Name	Description
1 Proposal Type	Select the appropriate type from the drop-down list. This information may be specified in the sponsor's announcement or guidelines
2 Activity Type	Select the appropriate entry from the drop-down list
3 Project Dates	Enter the date the project is expected to start and the date the project is expected to end. Use the **mm/dd/yy** format or the Calendar tool to select the date.
4 Project Title	Enter a descriptive title. For electronic submission, the Title cannot contain special characters. 200-character maximum; individual sponsors may require shorter titles. Refer to the sponsor instructions
5 Sponsor	**Agency/Sponsor** is the organization providing funding. Enter sponsor's 6-digit code or click **Search** to find it.

Table 2 Required Fields After Saving a Proposal

Conditionally Required	Description
A Prime Sponsor Code	**Prime Sponsor,** if MIT is a subcontractor for the proposal, is the agency providing funds to the sponsor. If not, leave this field blank.
B Award ID	This field is required with the following Proposal Types: Progress Report, Renewal, Renewal Changed/Corrected, Supplement, Supplement Changed/Corrected, Task Order. For other Proposal Types, this field is not required and may be left blank.
C Original Institute Proposal ID	Required with the following Proposal Types: Budget-SOW Update, New Changed/Corrected, Renewal Changed/Corrected, Resubmission Changed/Corrected, Supplement (only if NIH proposal), Supplement Changed/Corrected. For other Proposal Types, this field is not required and may be left blank.

Table 3 Conditional fields after saving a proposal

4. Click on the **Sponsor & Program Information** panel and enter the required fields (this information can be found in the Table Below). Notice you will not see red asterisk by the field names.

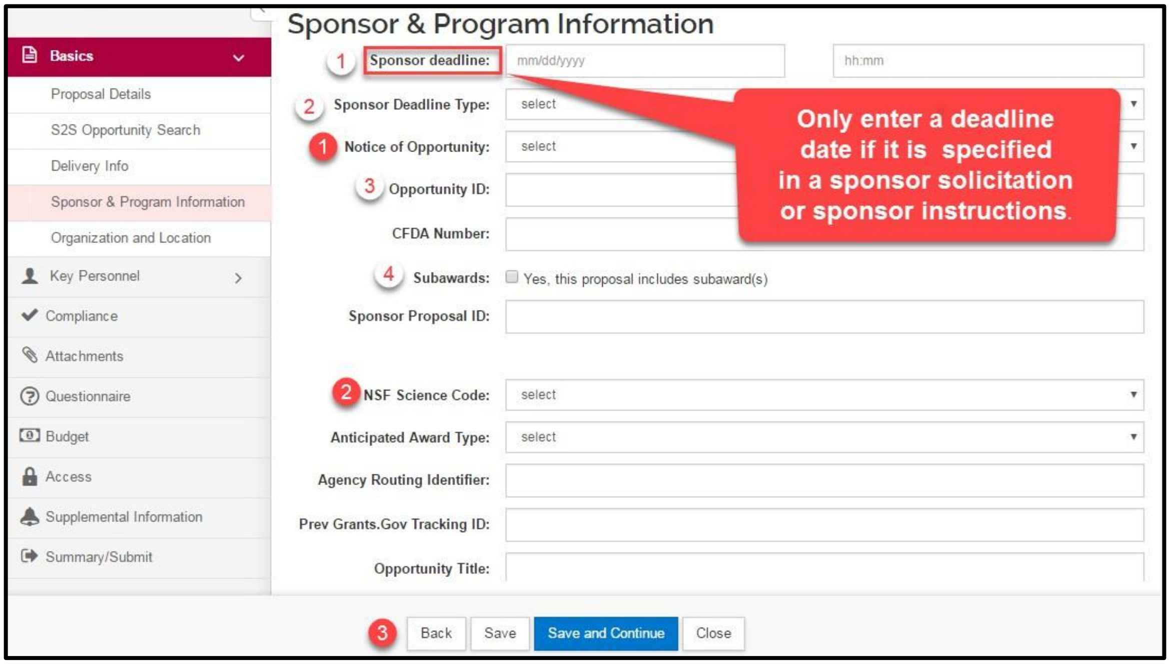


Figure 6 – Sponsor & Program Information

Required Field Name	Description
1 Notice of Opportunity	Select an entry from the drop-down list to identify how this funding opportunity was announced.
2 NSF Science Code	Select the code from the drop-down list for all proposals, not just NSF submissions. **This is a required field** and data is used to aid federal and institutional annual reporting requirements.
3 Action Buttons	Available Action Buttons.

Table 4 Sponsor and Program Required Fields

Conditionally Required	Description
1 Sponsor Deadline	The Sponsor-specified due date (in solicitation announcement or instructions) for this submission. **Entering Internal Target Dates not specified by the Sponsor affects MIT internal reporting – if the sponsor does not specify a date, leave this field blank.**
2 Sponsor Deadline Type	From the drop-down list select the Sponsor Deadline Type of Postmark, Receipt, or Target. Required if sponsor specified, otherwise leave blank.
3 Opportunity ID	Required if *Notice of Opportunity* is not equal to Verbal Request for Proposal or Unsolicited. Enter data manually or, for Grants.gov submissions, data will be populated automatically if CFDA is used to search and link. Otherwise, insert the Funding Opportunity Number to perform the Grants.gov search.
4 Subawards	Select the checkbox if the PI plans to contract out any portion of MIT's scope of work. If there are no subcontracts, leave it unchecked.

Table 5 Sponsor and Program Conditionally Required Fields

Organization

1. Click the **Organization and Location** subpanel.

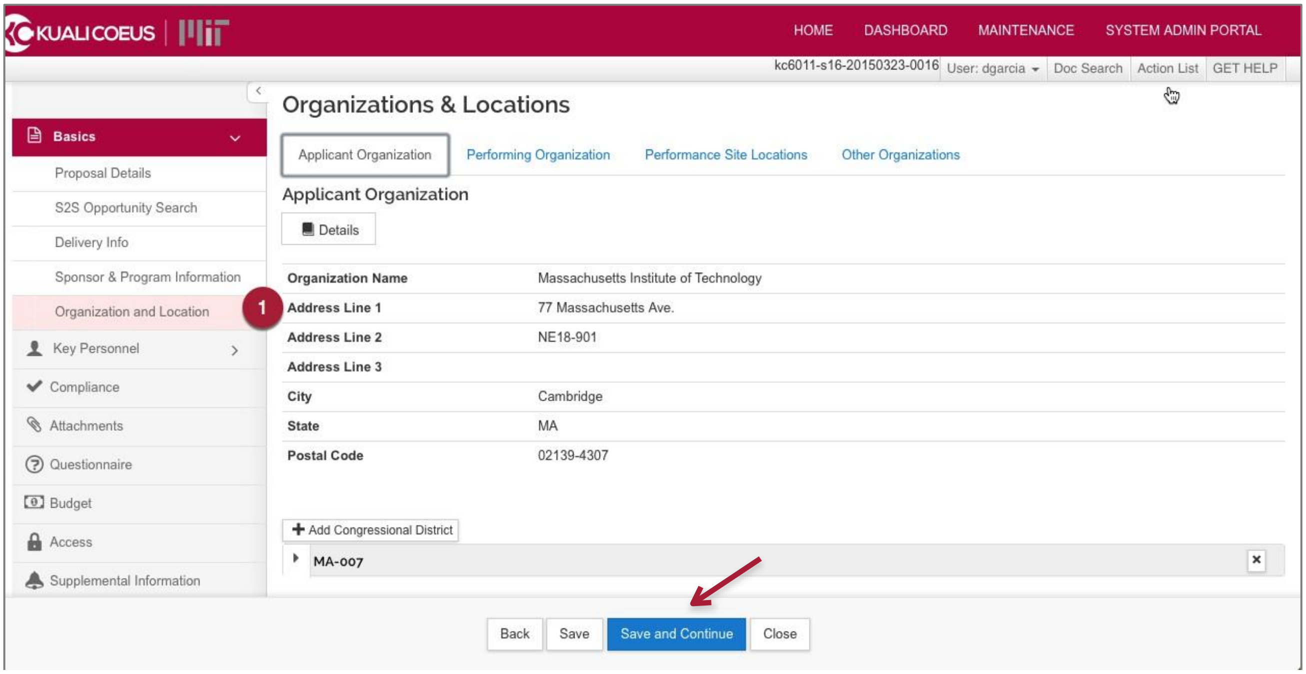


Figure 7 – Organization & Locations Tab

2. If your proposal includes a **subcontract**, you must list an **Other Organization** involved in the project. You may also list a Performance Site. Select **Other Organization** from tabs below **Organization & Locations** header.
3. Click the **Add Organization** link.

4. Conduct a search using any of the fields found on the Lookup Window and click **Search**.
5. If you need a new Organization or Address Book created, please request it on the forms page.

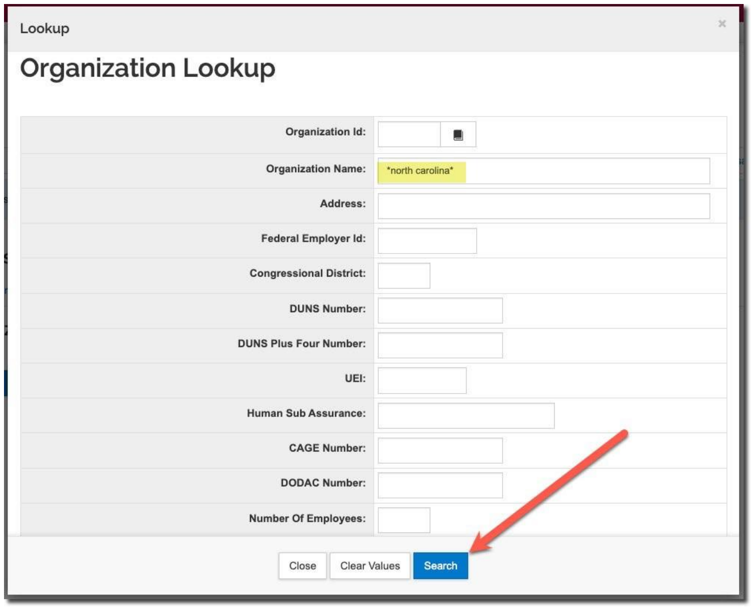


Figure 8 – Organization Lookup

6. Once you have located the **Organization**, click in the **checkmark** field, and click the **return selected** button at the bottom of your screen. Depending on your browser settings you may need to scroll down within the window to see the **return selected** button.

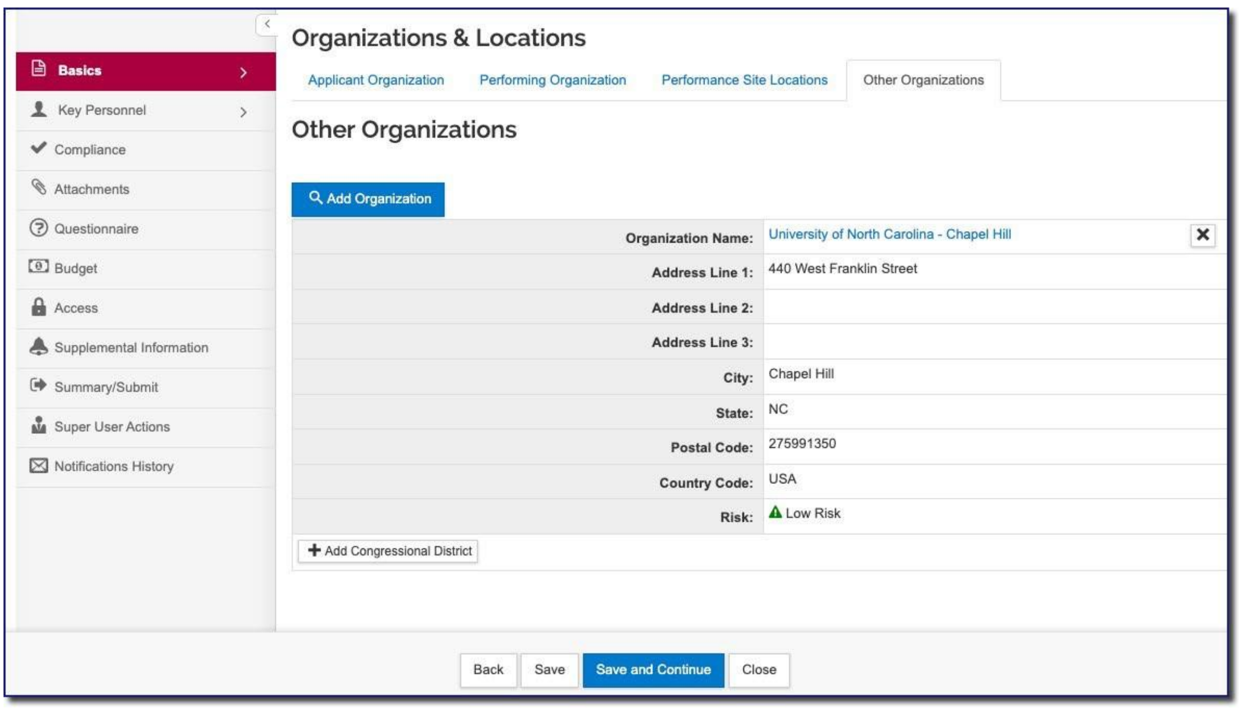


Figure 9 – Other Organizations Tab

7. Click the **save** button or the **Save and Continue** button.

Investigator/Key Study Persons

From the **Key Personnel** Subpanel, click **Add Personnel** button to add the Principal Investigator, Co-Investigator(s), and Key Study Person(s). Then click the **save** button or the **Save and Continue** button.

NOTE: Every proposal **must** have someone named as PI/Contact

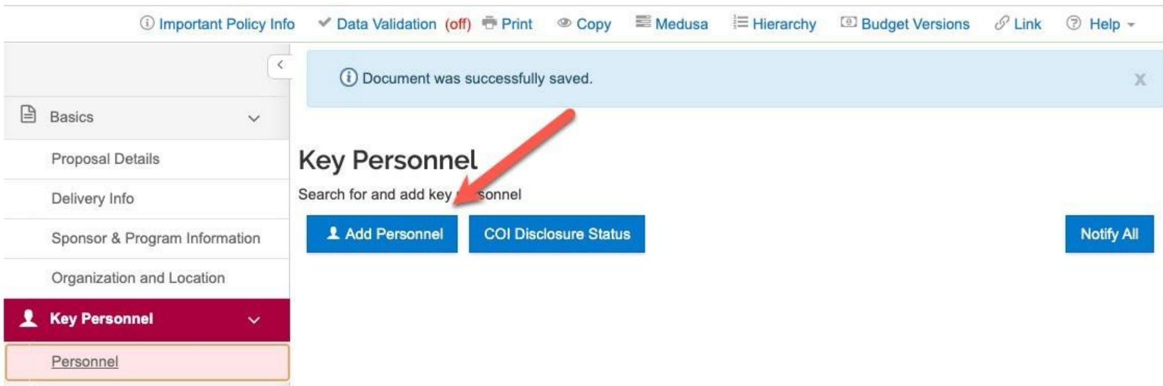
1. 

Figure 10 – Key Personnel Screen

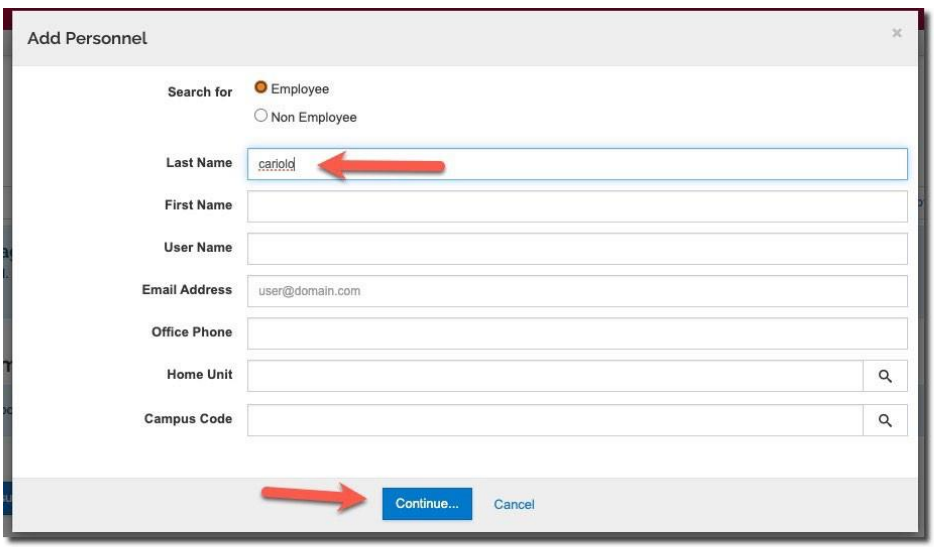
2. 

Figure 11– Add Personnel –Search Employee Window

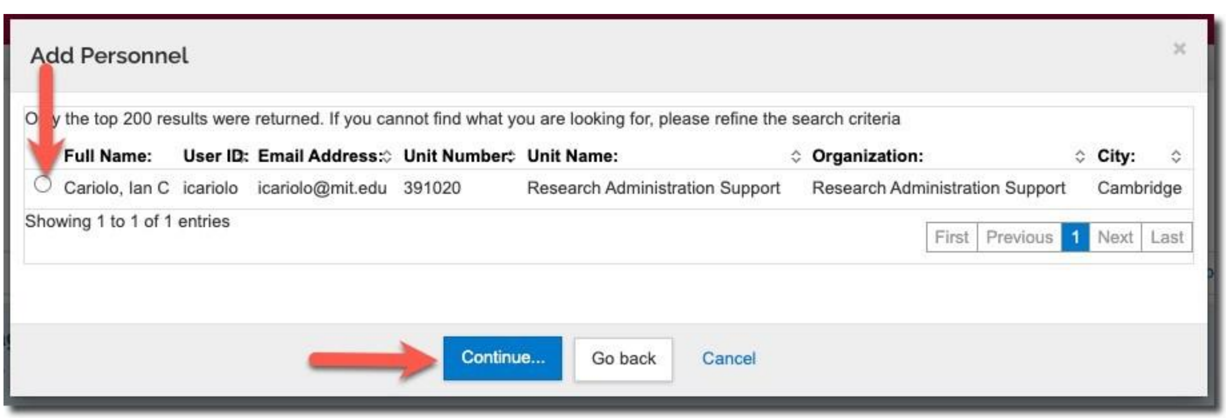
3. 

Figure 12 – Add Personnel Search Personnel Results Window

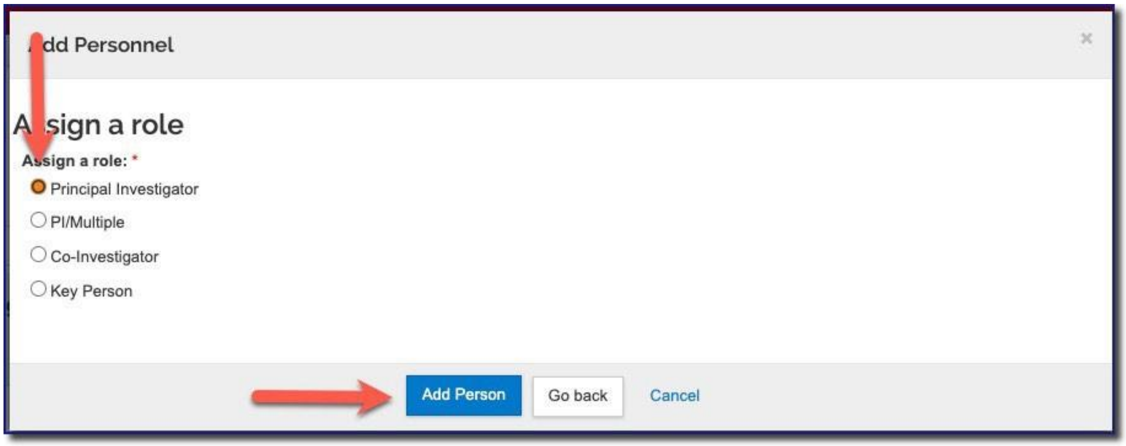
4. 

Figure 13 - Add Personnel - Assign a Role Window

5. 

Figure 14 Key Person After Add Person

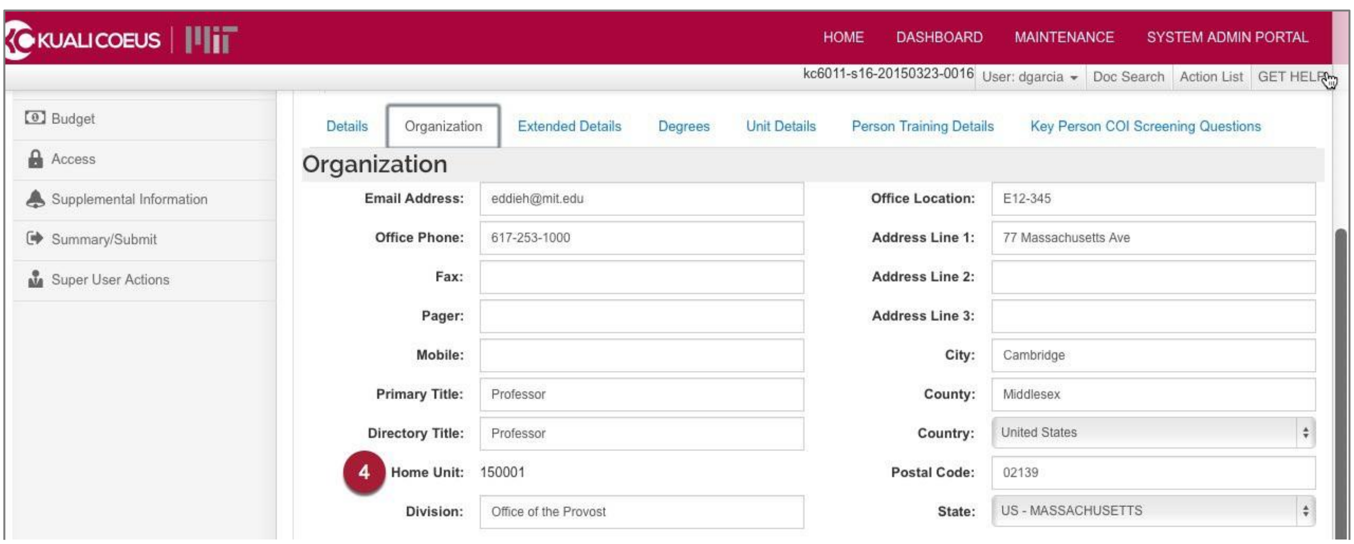


Figure 15 – Key Personnel – Person Detail - Organization Tab

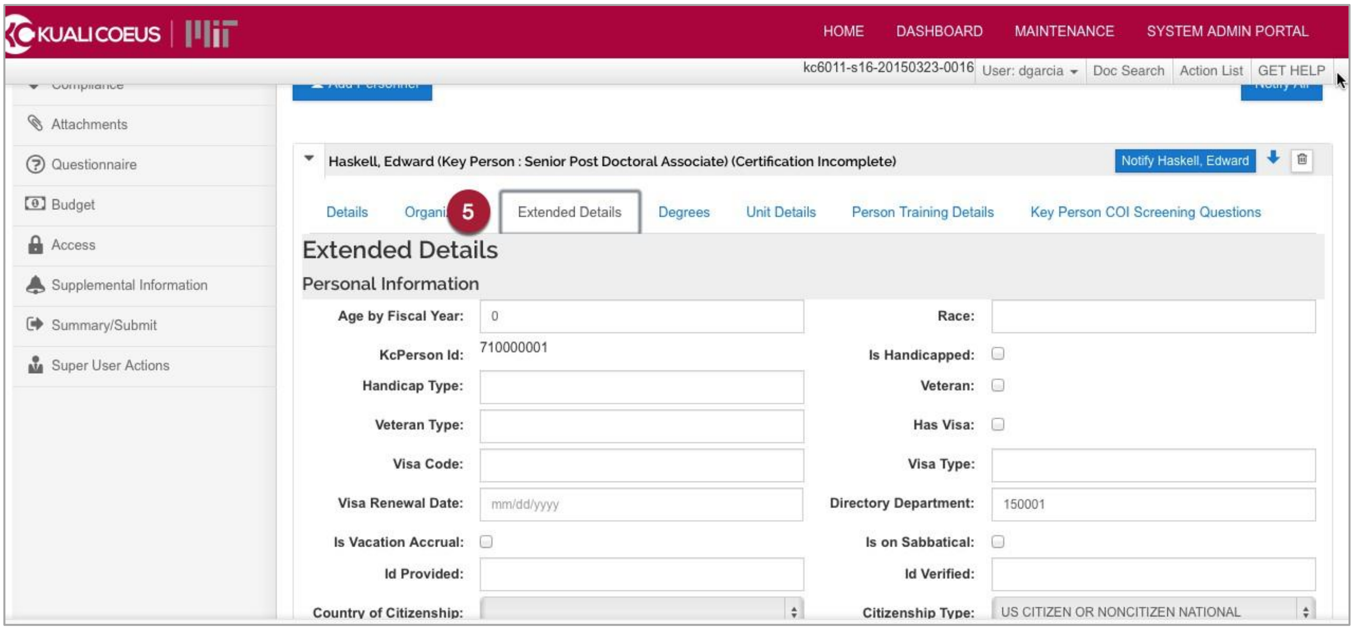
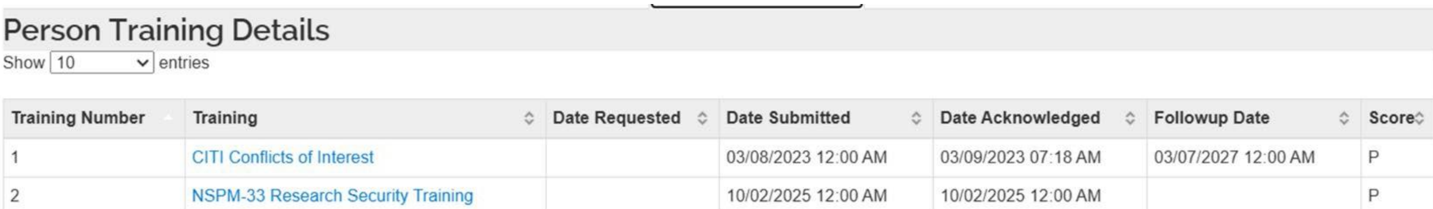


Figure 16 – Key Personnel – Person Detail - Extended Details Tab


Person Training Details

Show 10 entries

Training Number	Training	Date Requested	Date Submitted	Date Acknowledged	Followup Date	Score
1	CITI Conflicts of Interest		03/08/2023 12:00 AM	03/09/2023 07:18 AM	03/07/2027 12:00 AM	P
2	NSPM-33 Research Security Training		10/02/2025 12:00 AM	10/02/2025 12:00 AM		P

Figure 17 – Key Personnel – Person Detail - Person Training Details

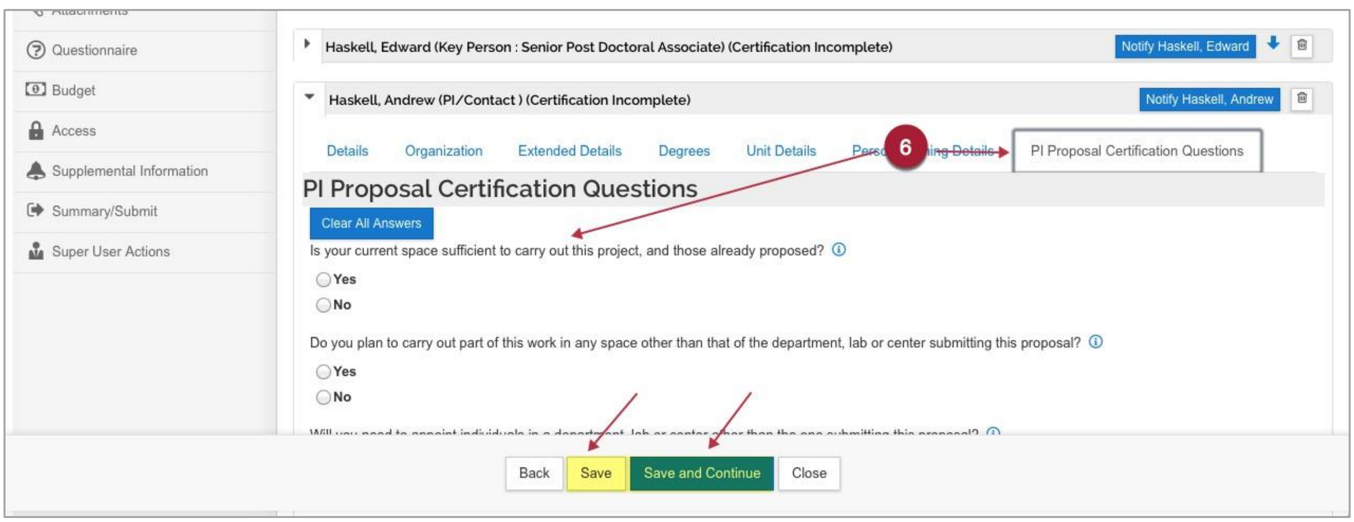


Figure 18 – Key Personnel – Person Detail -Certification Questions

Add Key Personnel step descriptions

Required Field Name	Description
1 Name	The Employee/Non-Employee Search will populate the Name and other contact information.
2 Notify All	Investigators (and Key Study Persons if a PHS/NIH proposals or required by sponsor) must be certified before the proposal

	can route for approval. Click **Notify All button** and select the names of the persons to receive an email with a link to self-certify.
3 Assign a Role	Select the appropriate role from the radio button menu options: Principal Investigator, PI Multiple, Co- Investigator, or Key Person.
4 Home Unit	For PI, Home Unit is Lead Unit where the proposal is created and managed (populated by search). The Proposal will route for approval to all units listed for PI and CO-Investigators in the Details. – [DLC #]
5 Extended Details	Click **Extended Details** to review and update contact information. Add/Remove **Units** listed for routing for approval.
6 Certify View	Once an Investigator has completed the Certification (indicated by a green checkmark) you may click **View** to review the Certification responses.

Table 6 Investigator and Key Persons Required Fields

Conditionally Required	Description
1 Key Person Role	If you select Key Person as Proposal Role, the **Key Person Role** field will display, with the person's directory title as default. Enter the person role on the project/program.

Table 7 Investigator and Key Persons Conditionally Required Fields

Compliance

Compliance is used to identify research that requires special review or approval, such as work with human subjects, animals, or recombinant DNA. If your proposal, including any subcontracts, requires Special Review/Approval, complete the required fields then click **Add Entry.**

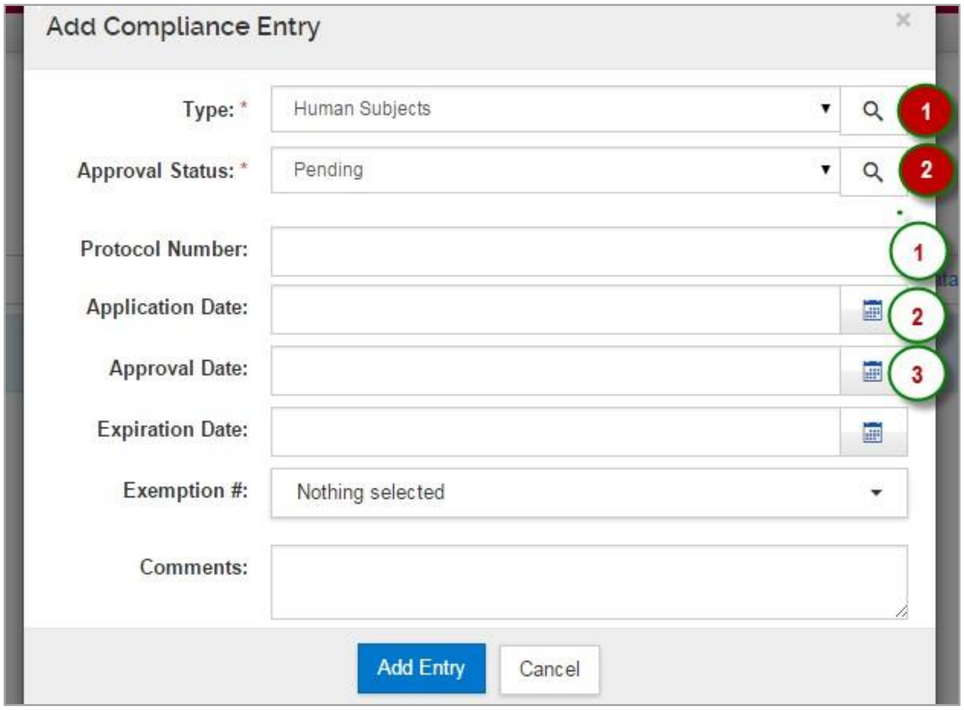


Figure 19 - Compliance Tab

Required Field Name	Description
1 Type	Select appropriate entry from pull-down menu.
2 Approval Status	Select **Pending** or **Not yet applied** approval status from pull-down menu.

Table 8 Compliance Tab Human Subjects Protocol Required Fields

Conditionally Required	Description
1 Protocol Number	Add Protocol Number and other details if available.
2 Application Date	Enter Application Date
3 Approval Date	Enter an Approval Date

Table 9 Compliance Tab Human Subjects Protocol Conditionally Required Fields

Questionnaire

When applicable, access the Questionnaire from the left navigation Subpanel. Complete the required sections as shown below. **This questionnaire will come into play if the proposal is being rerouted, or if the Proposal Type is Budget/SOW**.

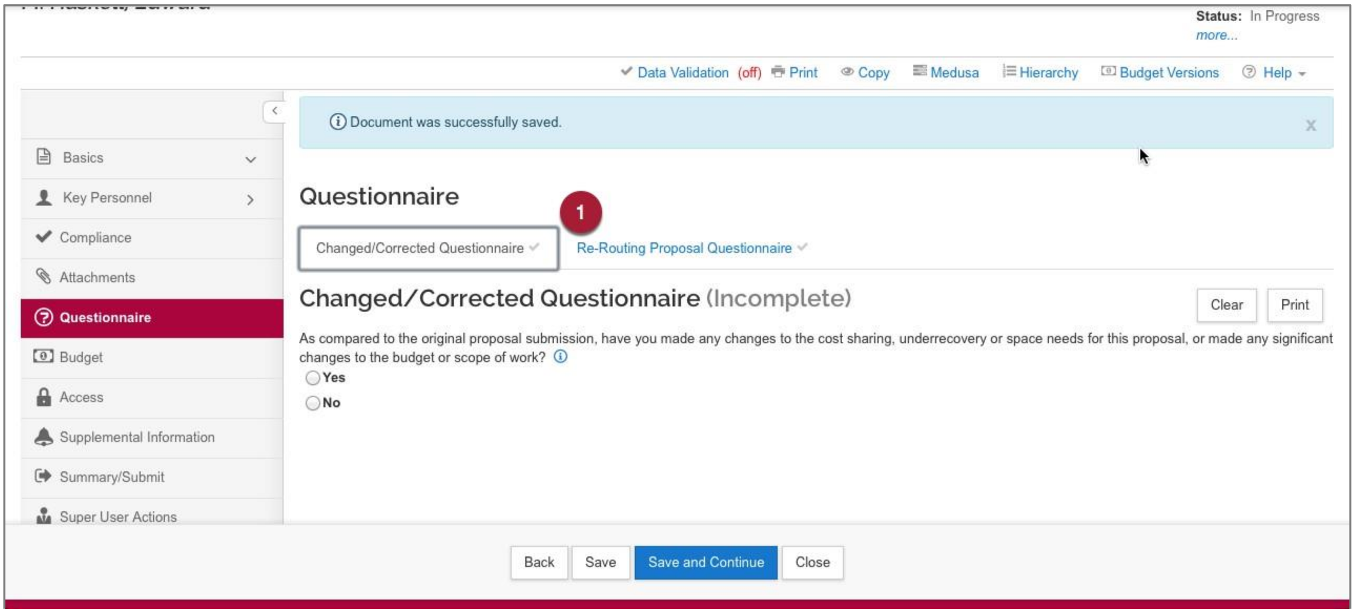


Figure 20 - Questionnaire Screen

Required Field Name	Description
1 Questionnaire	Answering a Questionnaire **may** be required to complete, validate, and submit your proposal for approval routing. If the questionnaire is mandatory, you will be alerted when selecting Validate from the screen. If re-routing the proposal, you will be required to complete the **Re- Routing Proposal Questionnaire**. Answer the question about whether the budget or scope of work for the proposal has been modified.

Table 10 Questionnaire Required Fields

Budget

You must complete the required sections below to submit the proposal and have it route for approval. From Proposal screen click on the **Budgets** subpanel.

Next, click the **Add Budget** button. Please note MIT does **not** require budgets to be created in any detail greater than what the Sponsor requires.

Don't forget to click **Save**.

1. Populate the required fields on the **Periods & Totals** screen found in the **Budget** subpanel.

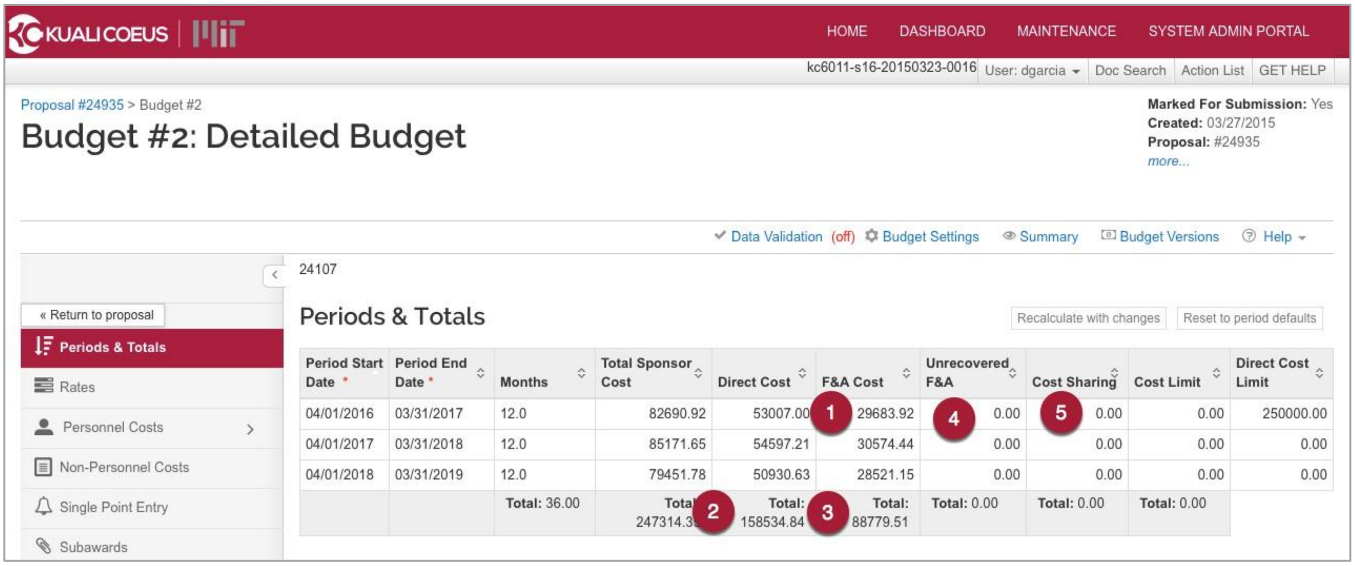


Figure 21 – Detailed Budget > Period and Totals Screen

Required Field Name	Description
1 F&A Cost	Calculated expense based on the F&A Rate type (pre-selected based on the Proposal **Activity Type** e.g., Organized Research = MTDC). The F&A Rate type may be changed from pull-down list in the Budget Settings window.
2 Total Sponsor Cost	The Period row field displays the sum of Direct Costs and F&A Cost. The Column Total is the sum of all periods.
3 Total F&A Cost	Summary Budget: enter the Indirect Cost amount per period. Detailed Budget: populates from the budget line items details. The Column Total will sum the period amounts.
4 Unrecovered F&A	Summary Budget: for each Period, enter the amount of Under Recovery. After saving, select **Under Recovery Distribution** from left navigation and enter source of funds. Detailed Budgets: populates from the budget line item details.
5 Cost Sharing	Summary Budget: enter a value for each period, if appropriate. Refer to the sponsor guidelines and MIT policy regarding cost sharing requirements. After saving, select **Cost Sharing Distribution** from left navigation and enter source of funds. Detailed budget: populates from the budget line item details.

Table 11 Budget Periods and Totals Definitions

2. From the Proposal's Budget Screen, click the **Actions** drop-down menu:
    a. Select the **Complete Budget** option.
    b. Select the **Include for Submission** option.

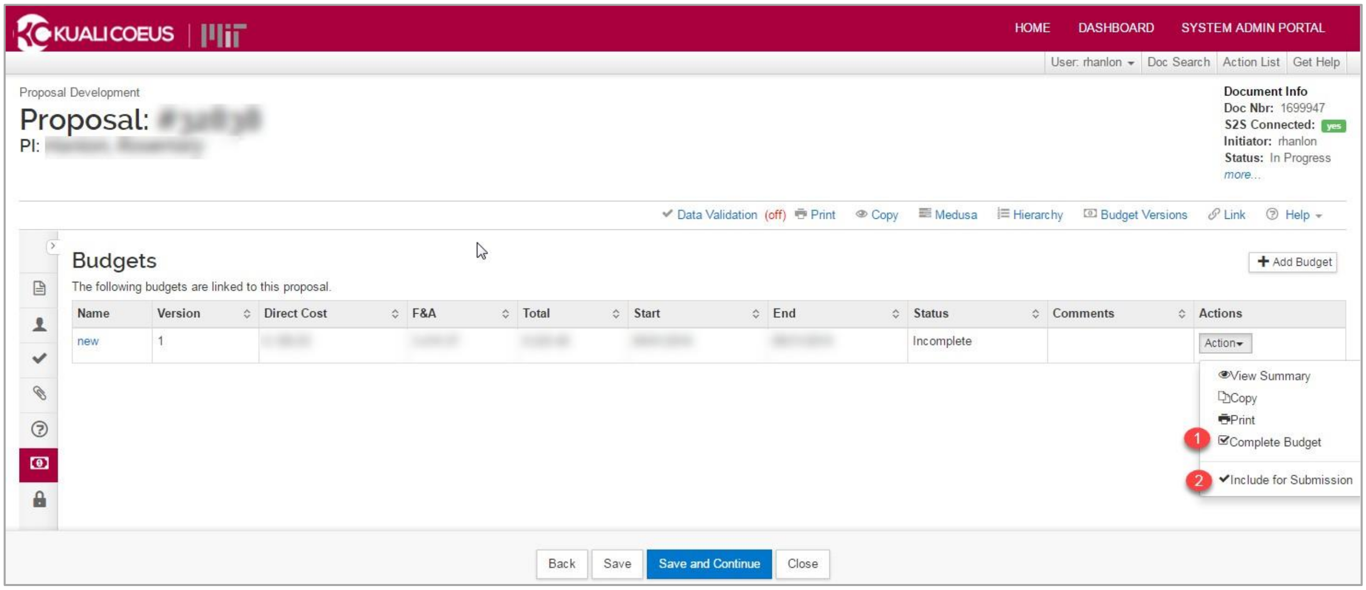


Figure 22 – Budget Screen. Actions Menu Options

Required Field Name	Description
1 Complete	Select **Complete** from Actions pull-down menu. The budget must be complete to submit for routing for approval.
2 Include for Submission	Choose the **Include for Submission** list option to designate the budget version for approval routing and/or submission to sponsor.

Table 12 Required Fields on Budget Screen Actions Menu.

Attachments

Upload Attachments contains multiple tabs where you can upload and attach required documents for your proposal. Complete required fields, and then click **Save**.

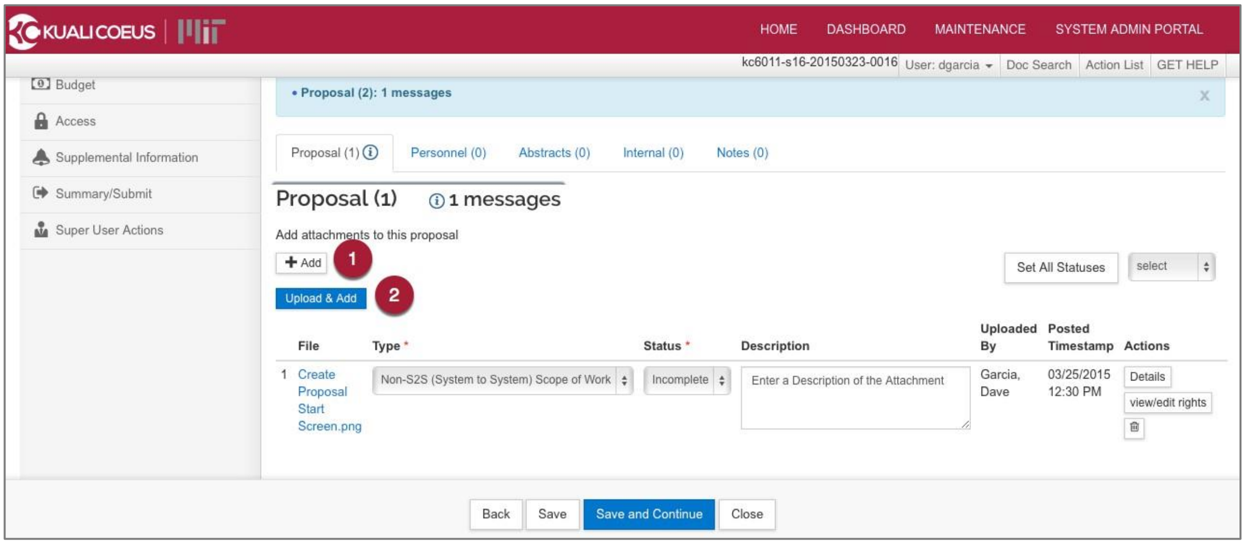


Figure 23 – Attachments Tab

Required Field Name	Description
1 Add	Select **Non S2S Budget File** and **Non S2S Scope of Work** from the pull-down Attachment Type menu.
2 Upload and Add	Takes you to the screen where you can upload and add attachments.

Table 13 Attachments Required Field

The Add Attachment pop up window below displays the mandatory fields needed to attach a file.

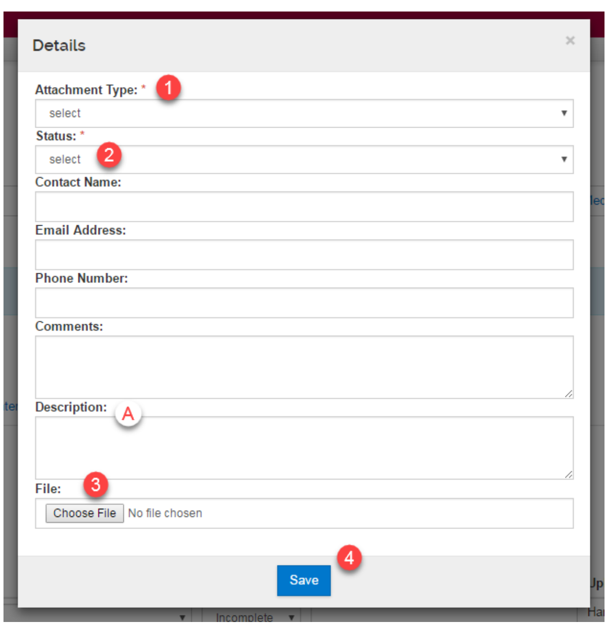


Figure 24 – Attachment Details Pop-Up Window

Required Field Name	Description
1 Attachment type	Select the appropriate Type (i.e., Non S2S Budget File) from the pull down menu.
2 Status	Select the status from the drop-down list to indicate the final version of the document.
3 File	Open allows you search your computer for the file you wish to attach.
4 Save	Click the Save button to save this file to the proposal.

Table 14 Attachments Required Fields

Conditionally Required	Description
A Description	Summary name of attachment type

Table 15 Attachments Conditionally Required Fields

Validations

Prior to submitting your proposal for routing and approval, select **Validate** from the options below the document header. KC will run validations to ensure you have completed the minimum requirements. If the validation checks return with errors or warnings, make appropriate corrections, and then run the Validation checks again. Click the **data validation** link to get started.

Figure 25 – Data Validation

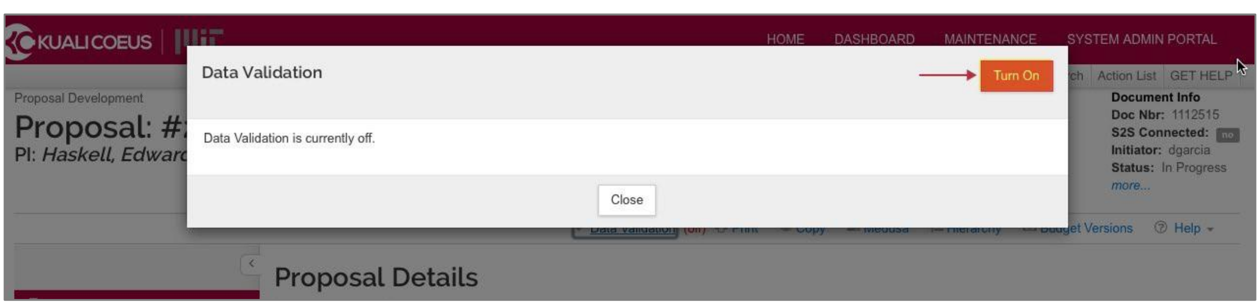


Figure 26 – Data Validation Turn On Button


Data Validation

Turn Off

Show 10 entries

Search:

Area	Section	Description	Severity	Actions
Error				
Attachments	Proposal Attachments	Proposal Attachment Status Codes must be set to "Complete".	Error	Fix It
Budget		The budget is incomplete. Please update the status.	Error	Fix It
Personnel		PI/CoI needs to complete their Research Security training.	Error	Fix It
Proposal Details	null	Original IP is missing and is required for this proposal type	Error	Fix It
Questionnaire	Changed/Corrected Questionnaire	You must complete the questionnaire "Changed/Corrected Questi onnaire"	Error	Fix It
Warnings				
Sponsor & Program Info		Sponsor deadline date is in the past, relative to the current date.	Warnings	Fix It

Showing 1 to 6 of 6 entries

Previous Next

Figure 27 – Data Validation On Window.

Related Documentattion

[Navigation and Proposal Development in Kuali Coeus]
[Proposal Types Reference Card]
[Proposal Review and Approval for DLC, Dean / VPR / Provost Approvers]

Getting Help

For questions regarding Kuali Coeus Quick Reference Cards, email the Support Team at ra-help@mit.edu.