

Overview:

This Quick Reference Card will introduce you to the Award document in Kuali Coeus. It covers basic navigation and documents elements at a high level. For a more detailed overview of the award please see the All About Awards Training Guide.

Notes:

For additional information on KC Awards, also see:

https://kc.mit.edu/quick-reference-cards

Procedure:

What is Kuali Coeus?

The Kuali Coeus system has been developed based on MIT's Coeus system to assist the Office of Sponsored Programs, Departments, and Laboratories in proposal development and pre- and post-award management. The purpose of the system is to simplify and make it more efficient, award acquisition and administration for all offices within the Institution. With its comprehensive proposal development module and post award functionality, Kuali Coeus is a cradle-to-grave award management tool. This software makes it possible to prepare proposals, route them internally to obtain proper approvals, and submit them to sponsors electronically. The main modules in Kuali Coeus are: Proposal Development, Institutional Proposals, Awards, Subawards, Negotiations, Conflict of Interest, IRB, and Award Report Tracking.

The Award Module

The Award Module maintains detailed information on awards and subawards including a complete history of every change made to an award and subaward from notice through closeout. The Kuali Coeus system stores all agency contacts (in the electronic address book), maintains all reporting requirements (financial, technical, property, patents), maintains the terms and conditions, required cost sharing, special reviews (animals, human subjects, biohazards, etc.), F&A rates (whether limited by agency of fixed for the life on Federal awards), as well as the required approvals for equipment, foreign travel, and subawards.

For general questions send email to ra-help@mit.edu

Main Menu

When you log on to Kuali Coeus, you will see the Main Menu bar, which is always visible, consisting of the following tabs: Home, Dashboard, Maintenance, System Admin Portal, Doc Search, Action List, and GET HELP.

us 		HOME DASHBOARD MAINTE	NANCE SYSTEM ADMIN PORTAL
		kc6011-s16-20150323-0615 User: kszulc	Doc Search Action List GET HELP
ne, kszulc			
Search Tasks: What would you like to do?		Go!	Your Recent Tasks Create Proposal View All My Protocols Search for Institutional Proposals Perform Person Mass Change
Browse Tasks			-
Pre-Award	Post-Award	IRB Protocols	
Create Proposal Search for Proposals View Proposals Enroute View All My Proposals Create Proposal Sciences Loce S2S Opportunity	Create Post-Award Search For Post-Award View Award Report Tracking Create SubAward Soarch For SubAward	Create IRB Protocol Search For IRB Protocols Amend or Renew IRB Protocol Notify IRB of a Protocol Request a Status Change on a IRB Prot	
	ne, kszulc search Tasks: What would you like to do? Browse Tasks Pre-Award Create Proposal Search for Proposals View Proposals Enroute	Search Tasks: What would you like to do? Browse Tasks Pre-Award Create Proposal Search for Proposals Search for Proposals Search for Proposals Search for Proposals View Proposals Enroute View Award Report Tracking View Award Search Search Tor Post-Award	kc6011-s16-20150323-0615 User: kszulc me, kszulc Search Tasks: Gol What would you like to do? Gol Browse Tasks Pre-Award Post-Award IRB Protocols Create Proposal Create Post-Award Create IRB Protocol Search for Proposals Search For Post-Award Search For IRB Protocol View Aroposals Enroute View Aroposals Enroute View Aroposals Enroute View All My Proposals Create SubAward Amend or Renew IRB Protocol View All My Proposals Create SubAward Notify IRB of a Protocol

Figure 1 – Kuali Coeus Home Page

The top tabs represent a user group and functions associated with those users:

Home Screen – All Users **Dashboard** – PI, Institute or DLC support activities Maintenance – Office of Sponsored Programs Personnel (Generate & Maintain SAP Feeds, Workload Balancing) System Admin Portal – Data Stewardship, Master Data Maintenance, and IT System Administration

The Action List and Doc Search are quick access buttons at the top of most screens which allow users to see communications, other documents, and workflow actions users are being requested to perform.

Action List – opens a communications "inbox" and "outbox".

Doc Search – allows users to search for any documents they are authorized to access. By default, if no date is entered, a document search will only return current day's documents

Note: There are over 300 document types in KC, and a **Doc Search** may be used to locate any document in KC. An award record may be made up of several linked Documents. The Doc Search does not allow you to search by account number, PI name, or Unit. To find Awards by these types of search criteria, the Award Lookup search is recommended instead.

Basic Guidelines

- Departmental/Faculty users will have **View-only** capabilities of the Awards in KC. Award modification is performed at RAS.
- When viewing an award, you will see the current status of the award. A timestamp of the last update is found on the Award Document Header (Last Update field). (Award History can be accessed by clicking the view history button on the Award tab → Details & Dates panel.)

	PI:	Haskell, Edward	Document ID:Status:	1114615:FINAL
KC Award 😰	Lead Unit:	Massachusetts Institute of Tec	Award ID: Account:	023864-00001:
	Sponsor Name:	NIH —	Last Update:	02/16/15 05:50 PM by kszu
Award Contacts Commitments Budget Versions Payment, Reports & Terms Special Rev	iew Custom Data	Comments, Notes & Attachment	s Award Actions Medus	a

Figure 2 – Last Update Timestamp

The Award ID (Number) and the Version Number is shown on the Award tab
 → Details & Dates panel → Institution subpanel.

ward	Contacts	Commitments	Budget Versions	Payment, Reports & Terms	Special Review	Custom Data	Comments, Notes & Attachments	Award Actions	Medusa
								time & money	expand all collapse
	ocument (Overview		▶ show					
F	unding Pro	posals		▶ show					
		-							
)etails & Da	ates		▼ hide					
	Details and	Dates							view history
10	▶show Cu	rrent Action							
	▼ hide In	stitution							
		🔶 Award	ID: 023864-00001		Lead Unit ID:	000001 - Mas	sachusetts Institute of Technology		
		Versi	ion: 12		Account Type:				
		Award Stat	tus: Active		Activity Type:	Organized Res	search		
		Account	ID:		Award Type:	Grant			

Figure 3 – Award ID & Version Number

Note about Kuali Coeus Award IDs

Award IDs (Numbers) are generated by Kuali Coeus and consist of a six-digit award base number, for example, **013696**. The digits following the award base number (**-xxxx**) identify the award node. The first award created will always have the node `**-00001**.' This may be the only node in the award, but will become a Level 1 – or `Parent' - award if additional awards are added to the structure, thereby creating an Award Hierarchy.

There can only be one Level 1 - or Parent - award, there can be one or multiple Child awards created under the Parent award. Child awards are new nodes that are added sequentially under the Parent award and are numbered **-00002**, then **-00003**, and so on. Once a Level 2 award is established, additional Child awards can be added to the Level 2 branch, or a Level 3 branch, etc., under the Level 2 Child award.

Navigating the Award Module

Users can access Awards (depending on your roles and permissions) from the **Home** link, the **Dashboard** link and/or the **Doc Search**.

HOME	DASHBOARD	MAINTEN	ANCE SY	STEM ADMIN	I PORTAL
kc6011-s16-3	0150323-0615	and the second second	Dec Oceant	A share 1 lak	OFTUELD

Figure 4 – Accessing Awards

The Home tab contains links to Search for Post-Award and View All My Awards in the Post-Awards Menu Group. Search for Post-Award and View All My Awards links take you to the Award Lookup screen.

- The **Search for Award** option displays tools for entry and selection of various award-related criteria, which allows you to refine and conduct a search for Awards. From the search result table, you are then able to open or view medusa information about each Award displayed.
- The **View All My Awards** option displays Awards where you are listed as an Investigator and allows you to conduct a search for other Awards you have access to. From the search result table, you are then able to open or view medusa information about each Award displayed.

		HOME DASHBO	ARD SYSTEM ADMIN PORTAL
	kc6021-s18-2015	0430-0613 User: skluth -	Doc Search Action List Get Help
Welcome , Samantha			
Search Tasks			Courtesy Links OSP Web Site COI NDA CITI Training Grants.Gov OSP Contacts
Browse Tasks Pre-Award	Post-Award	Subaward	s
Create Proposal Search for Proposals View Proposals Enroute view more	Create Award Search for Award View All My Awards view more	Create Sub Search for View ISR/S view more.	SubAward SR Reporting



Using the Award Kuali Coeus Lookup Screens

To open/display an existing award, you will use the applicable **Lookup Screen** to enter your search criteria. The **Award Lookup** screen is displayed automatically when you click on a particular search link (**Search for Post-Award** or **View All my Awards**).

In the Award Lookup screen:

- You can search by ID number, status, PI name, title, and more.
- You can combine searches (i.e. searching for all 'Active' Awards for Investigator 'Haskell').
- The Lookup fields will accept requests in both alpha and numeric formats. For a numeric request or a request that combines numbers and letters, enter the argument exactly as it is stored in the database and the correct result will be returned.
- To enter partial values, you must use a **Wildcard** placeholder.

Note: Wildcards are characters that are used when entering search criteria in place of one or more unknown characters. The asterisk (*) wildcard is especially helpful when searching names, titles, organizations, etc. Since the data is entered in a very specific format, you must search using the same format to retrieve the desired results.

Award Lookup 😰	
	* required field
Award ID:	
Sponsor Award ID:	
Account ID:	
Award Status:	▼ 🔍 🕮
Sponsor ID:	
Sponsor Name:	9
Award Title:	
Investigator:	9
Lead Unit ID:	<u>م</u>
Lead Unit:	Q 🛍
OSP Administrator:	
Archive Location:	
Archive Date From:	
Archive Date To:	
(search) (clea	ar) cancel

Figure 6 – Award Lookup Screen

The **Award Lookup** screens in KC are built with various data fields:

• **Drop-down**: some fields in KC have drop-down lists associated with them to select a value from the list.

Award ID:	
Sponsor Award ID:	
Account ID:	
Award Status:	🛄 🖉 🔻
Sponsor ID:	
Sponsor Name:	Active Inactive
Award Title:	Pending
Investigator:	Terminated
Lead Unit ID:	Closed
Lead Unit:	Restricted - No Postings Allowed

Figure 7 – Drop-Down Field

• **Lookup Icon**: Some fields have search icons associated with them, this allows you to search for and select a value from a search table.

Sponsor Name:	<u> </u>
Award Title:	
Investigator:	————————————————————————————————————

Figure 8 – Lookup Icon

• **Calendar**: Some fields have a calendar tool associated with them to select a date.

Archive Date From:	
Archive Date To:	
search cle	ar cancel

Figure 9 – Calendar Tool

• **Text Fields**: Some fields are free text fields.

Award ID	
Sponsor Award ID	
Account ID	

Figure 10 – Text Field

Once you enter your search value (or select from the drop-down list or search for it), you can click on the **Search** button or hit the **Enter**> key to yield the results, which will appear at the bottom of the screen. Depending on your browser settings, you may need to scroll down to see the results.

Note: If your search is too general, the resulting list may be quite long and Kuali Coeus will take a moment to compile the list.

Kuali Coeus Search Operators

In the fields that do not contain a drop-down list or a search icon, you will need to enter all or part of a value you are searching for.

 $\mathbf{T}_{\mathbf{Note}}$: Searches are not case-sensitive, so you can enter search terms in upper-, lower- or mixed-case.

Additionally, the following operators can be used to search in KC:

perator	Used to Locate	Examples			
No Operator	All values that equal the text entered in the search field	Entering: 1234567 in the Account ID field. (Account ID must be exact otherwise no search results will be returned.)			
* (Asterisk)	You can use the wildcard * at the beginning or end of a text string, to indicate that there may be any number of characters before or after the text.	Entering: 123 * in the Account ID field. (<i>This will display all Awards with Account</i> <i>ID starting with 123.</i>)			
< (Less Than)	All the values are <u>less than</u> the value that follows. For numeric values, include any leading zeros.	Entering: <1000000 in the Account ID field. (<i>This will display all Awards with Account ID</i> <u>less than</u> 1000000.)			
<= (Less Than or Equal To)	All values are <u>less than or equal</u> <u>to</u> the value that follows.	Entering: <=1000000 in the Account ID field. (<i>This will display all Awards with</i> <i>Account ID <u>less than or equal to</u> 1000000.)</i>			
> (Greater Than)	All the values are <u>greater than</u> the value that follows	Entering: >1000000 in the Account ID field. (<i>This will display all Awards with Account ID greater than</i> 1000000.)			
>= (Greater Than or Equal To)	All values are <u>greater than or</u> equal to the value that follows.	Entering: >=1000000 in the Account ID field. (This will display all Awards with Account ID greater than or equal to 1000000.)			
&& (And)	And	Entering: >0000108&&<=0000208 in the Account ID field. (This will display all Awards with Account ID greater than 0000108 and less than or equal to 0000208.)			
! (Not Equal To)	All values are <u>not equal to</u> the value(s) entered.	Entering: !1000000! in the Account ID field. (<i>This will display all Awards</i> <u>except</u> those with Account ID 1000000.)			
? (Like)	The '?' will match any one characters before and/or after the values entered.	Entering: 100?000 in the Account ID field. (<i>This will display all Awards with</i> Account ID <u>1001000, 1002000,</u> <u>1003000, etc</u> . The ? will match any one character with 100 before it and 000 after it.)			
 (Or)	Or	Entering: *108 *208 in the Account ID field. (<i>This will display all Awards with</i> <i>Account ID that end with 108 <u>or</u> 208.</i>)			

Table 1 – Search Operators

Sorting Search Results

Often a search will result in returning a large list of records. To organize the data, you can sort the results by clicking on any column heading in the Award Search Result list.

To sort a long list of returns, click once on a column heading to sort in ascending order; click again for descending.

39 ite	39 items retrieved, displaying all items.																
		Acti	ons _	•	Award ID	<u>Sponsor</u> <u>Award ID</u>	Lead Unit ID	<u>Lead Unit</u>	Account ID	<u>Award</u> Status	<u>Award</u> <u>Title</u>	Sponsor ID	<u>Sponsor</u> <u>Name</u>	<u>Investigator</u>	<u>OSP</u> Administrator	Obligated Amount	Anticipated <u>Total</u> Amount
open	<u>cot</u>	<u>ov</u> n	nedusa	EDS	023165- 00001	DE-AR0000471	<u>065009</u>	<u>ME-RAS F</u>	6930183	Active	Full Spectrum Stacked Solar- Thermal and PV Receiver	<u>000221</u>	DOE - Office of ARPA-E	<u>Chen, Gang</u>	<u>Goldberg,</u> Jamie	<u>3,420,000.00</u>	3,420,000.00
<u>open</u>	cor	<u>ov n</u>	nedusa	<u>EDS</u>	023832- 00001	DE-AR0000000	150001	<u>Center for</u> <u>Coeus</u> Training	6777771	Restricted - No Postings Allowed	Advanced Energy Research (EDS example)	000221	DOE - Office of ARPA-E	<u>Haskell,</u> Edward	<u>Holden, E Amy</u>	0.00	1,000,000.00

Figure 11 – Sorting Search Results

Saving Search Results

The results of any search can be exported to several different file formats. After you perform a search that you would like to save, click on the applicable file format buttons to download the results:

			lechnology					<u> </u>		
<u>open copy medusa</u>	023851- 00002	000001	Massachusetts Institute of Technology	Active	Testing MITKC- 773	<u>000340</u>	NIH	<u>Szulc</u> Katarzyna	<u>Shikes,A</u> Kristen	<u>0.0</u>
Export options <mark>: <u>CSV</u></mark>	spreads	heet XML ┥								

Figure 12 – Results Export Options

There are three different ways that you can download/save your results. The following methods are listed below:

Download Option	Description					
CSV CSV	Comma Separated Values file. Will download/open in Excel but will look and function slightly different than the XLS file.					
XML XML	Extensible Markup Language file. XML is a markup language that defines a set of rules for encoding documents in a format, which is both human-readable and machine-readable.					
Spreadsheet	Excel file. Will download as an Excel file and creates a worksheet that is modifiable.					

 Table 2 - Search Results Download Options

Viewing Award

To access an Award in Kuali Coeus, users should perform a search for the award.

	A	ctions		Award ID	<u>Sponsor</u> Award ID	<u>Lead</u> <u>Unit</u> <u>ID</u>	<u>Lead Unit</u>	Account ID	<u>Award</u> Status	<u>Award</u> <u>Title</u>	Sponsor ID	<u>Sponsor</u> <u>Name</u>	Investigator	<u>OSP</u> Administrator	Obligated	Anticipated <u>Total</u> <u>Amount</u>
oper	<u>copy</u>	<u>medusa</u>	EDS	023864- 00001	1R01MH085793- 01		Massachusetts Institute of Technology		Active	All About Awards	000340	NIH	<u>Haskell,</u> Edward	<u>Egan, Thomas</u> <u>W</u>	702,524.08	702,524.08
oper	<u>copy</u>	<u>medusa</u>	EDS	023864- 00002	1R01MH085793- 01	000001	Massachusetts Institute of Technology		Active	All About Awards	000340	NIH	Haskell, Edward	<u>Egan, Thomas</u> <u>W</u>	<u>0.00</u>	50,000.00
oper	<u>copy</u>	<u>medusa</u>		023864- 00003	1R01MH085793- 01		Massachusetts Institute of Technology		Active	All About Awards	000340	NIH	<u>Haskell,</u> Edward	<u>Egan, Thomas</u> <u>W</u>	<u>0.00</u>	50,000.00

Figure 13 – Award Search Results

From the displayed search results you can click on the following Action links:

Action	Description			
Open	Opens the Award.			
Сору	Allows users with appropriate authorization to copy the Award.			
Medusa Displays the Medusa Information for the Award.				
EDS	Displays the Electronic Documents Storage where authorized users have a one-stop access to documents linked to an award across modules (Development Proposal, Institute Proposal, and Award).			

Table 3 – Search Results Award Actions

To open the Award, users should click the **open** link. This will open the **Award Document**, which contains links to the other documents that make up an award: **Time & Money Document**, and one or more **Award Budget Documents**

The KC Award Document record is comprised of **Document Header**, **10 Tabs** (each with expandable / collapsible **Panels**), and **Action** buttons. Each section of the award breaks out important award details. For all but RAS users (RAS users can modify the content), the information displayed on each tab is **View/Read-Only**. If you see information that is incorrect or needs updating, it can only be changed or updated by those authorized to maintain the award.

				PI: Has	kell Edward	Document ID:	status: 1111838:	FINAL
ward ?		Header —			sachusetts Institute of "		count: 023864-0	
		neuder	Spon	sor Name: NSF		Last U	pdate: 12/08/14	07:07 PM by I
d Contacts Commitmen	ts Budget Versions	Payment, Reports & Term	ns Special Revie	w Custom Data	Comments, Notes &	Attachments Award A	ctions Medusa	া 🗕 🗲 Tal
				Time 8	& Money —	time & money	expand all	collapse all
				Time (x money	une a money	experie on	?
Document Overview	Panels	▼ hide						
	/							
Document Overview								
			* Descriptio	n: Award Budge	t			
		Organization D	ocument Numbe				Explanation:	•
Funding Proposals		▶ show						
Details & Dates		▼ hide						1
bergins & bates		- max						
Details and Dates							view his	story ?
▼ hide Current Action								, ¥
Transaction Type:				0	omments:			
New					<i>(</i>			
▼ hide Institution								
	d ID: 023864-00001		Lond Unit TD.		chusetts Institute of Te	m		_
	sion: 1		Account Type:	000001 - Massa	chusetts Institute of Te	chnology 🖼		
	atus: Active		Activity Type:	Organized Resea	arch			
Accoun			Award Type:		aren			
Award	Fitle: Award Budget	(A)						
▼ hide Sponsor	Award Budget	. U						
• mue sponsor		62		_				_
	Sponsor ID:	000500 🛄		Prime S	Sponsor:			
	Sponsor Award ID:			CEDA	Number:			
	Modification ID:				ce Code: Biological - L	ife Sciences: F.02		
show Sponsor Fundi								
▼ hide Time & Money								
		ffective Date: 01/01/201	5		0	bligation Start Date:	01/01/2015	
		ect End Date: 12/31/2017				Obligation End Date:		
	Ex	ecution Date:				Modification Date:		
	Anticip	ated Amount: 652,524.08	3			Obligated Amount:	652,524.08	
		▶ show						
Subawards								
Subawards Sponsor Template		▶ show						
		▶ show]

Figure 14 – KC Award Document

Award Status

It is important to note the Awards module always displays the current award status. Available status options are:

- Active: Award is billable. A fully executed award document or modification has been received for the award period entered. At MIT, any KC updates to this award will feed to SAP.
- **Inactive**: Administrative deletion of award.
- **Pending**: Award setup is not complete. Not yet billable used for 90-day pre award cost or extension pending. At MIT, any KC updates to this award will feed to SAP.
- **Hold**: Being reviewed for various regulatory reasons. At MIT, changes to awards with **Hold** status are not fed to SAP. New awards created in Hold status are not fed to SAP.
- **Terminated**: The award has expired. Used only for Consortia Members.
- **Closed**: File is complete, all reports submitted and received.

• **Restricted-No Postings**: The account is active but only certain transactions will be allowed to post on this account.

Note: Clicking the help icons (?) found throughout the Award Document (tabs, panels, etc.), will bring you to the online help information for the applicable section.

Award Document Header

The Award document header contains a date and time stamp, document number, and other important information that can be searched on later, such as the Initiator of the document, Sponsor Name, and the Principal Investigator.

PI: Haskell Edward	Document ID:Status:	1111838:FINAL
Lead Unit: Massachusetts Institute of Tec	Award ID: Account:	023864-00001:
Sponsor Name: NSF	Last Update:	12/08/14 07:07 PM by kszulc

Figure 15 – Document Header

This document header information also shows the **'Status**' of the document as it travels through the workflow:

Status	Description						
Approved	The document is approved.						
Canceled	The document is denoted as void and should be disregarded. Canceled documents cannot be edited.						
Committed	The document has been committed to the database. You do not normally see the ' COMMITTED ' status. The only time it might show is when there is a system error or performance issue.						
Disapproved	The document is disapproved by an approver as a valid research administration transaction. Disapproved documents cannot be edited.						
Enroute	The document has pending approval requests.						
Exception	The document has been routed to an exception queue because workflow has encountered a system error when trying to process a rule.						
Final	The document has been routed and has no pending approval or acknowledgement requests. Documents in ' Final ' status are considered approved.						
Initiated	The document is created.						
Processed	The document has no pending approval requests but still has one or more pending acknowledgement requests. Processed documents are considered approved.						
Saved	The document has been started but not completed or routed yet. The ' Save ' action allows the initiator of a document to save their work and close the document. The document may be retrieved from the initiator's action list for completion and routing at a later time.						

Table 4 – Document Workflow Status

Award Document Tabs and Panels

Each **tab** in the Award Document represents a different area of information within the award. The current tab will be highlighted in white as shown in the figure.

PI: Haskell Edward Document ID:Status: 1111838:FINAL KC Award 🛛 😰 Lead Unit: Massachusetts Institute of Tec Award ID: Account: 023864-00001: Sponsor Name: NSF Last Update: 12/08/14 07:07 PM by kszulc Award Contacts Commitments Budget Versions Payment, Reports & Terms Special Review Custom Data Comments, Notes & Attachments Award Actions Medusa

Figure 16 – Award Document Tabs

Panels are the drop-down areas within a document tab, where data is maintained. Additionally, the **show** and **hide** buttons will open and close the panels to help the user concentrate on one area of data at a time.

		ent Overview		► show							
	Funding	Proposals		✓ hide							
	Current Funding Proposals										
		Award Version	Principal Investigator		Lead Unit	Proposed Sponsor	Proposed Start Date	Proposed End Date	Total Costs	Actions	
	▶ show	1	Haskell Edward	000001 - Ma Technology	ssachusetts Institute of	000340 NIH	01/01/2015	12/31/2017	\$652,524.08		
								Total:	\$652,524.08		
1	Details 8	& Dates		► show	<u> </u>						
(Subawa	rds		▶ show							
	Sponso	r Template		► show							
ſ	Keywor	ds		▶ show	<u> </u>						

Figure 17 - Panels

Additionally, there is a **Time & Money** button at the top of award document which tracks award transactions and contains the distribution and management of project funds within the award hierarchy.

KC Aurent E	PI:	Document ID:Status:		111989:INITIATED
KC Award 😰	Lead Unit:	Award ID: A	Account: 0	00000-00000:
	Sponsor Name:	Last	Update:	
Award Contacts Commitments Budget Versions Payment, Reports & Terms Special Review Custom Data	Comments, Notes & a	Attachments Awa	ard Actions	Medusa
		ne & money e		collapse all required field

Figure 18 - Time & Money Button

Award Actions

Actions buttons are always positioned at the bottom of the page.

Keywords • show	
	save reload close
Figure 19 – Action Buttons	

v.1 KC: Introduction to Awards Quick Reference Card

Award Tab

The **Award** tab provides a summary of award information that is populated with data from the Institute Proposal record, an award template, hand-selected data, and custom text comments, which are then organized for consistent and quick summarization. Each award is crafted by RAS to capture the uniqueness of the award agreement. It includes information about funding proposals, subawards, dates, the project's sponsor, and includes the following 6 panels:

- Document Overview
- Funding Proposal
- Details & Dates
- Subawards
- Sponsor Template
- Keywords

KC Award			laskell Edward		Document ID:Stat		
No Awaru 📳			lassachusetts Inst	itute of Tec	Award ID: Account: 023864-00001: Last Update: 12/08/14 07:07 PM by ks:		
		Sponsor Name:	ISF				
Award Contacts Commitments Budget Versions	Payment, Reports &	Terms Special Revie	w Custom Data	Comments	, Notes & Attachments	Award Action	s Medusa
					time & money	expand all	collapse all
Document Overview	▶ show						
Funding Proposals	▶ show						
Details & Dates	▶ show						
Subawards	▶ show						
Sponsor Template	▶ show						
Keywords	▶ show						
U U							

Figure 20 – Award Tab

Contacts Tab

The **Contacts** tab of the Award document has four panels that specify and maintain contact information for key personnel, unit, sponsor, and the administration contacts for the award. It provides a single, convenient location for contact information of institutional and sponsor personnel with roles in award administration, including organization (or unit), relationship with the project, address, email, and telephone numbers.

KO A.				1		PI:	: Haskell, Edward		Document ID:Status:		: 1114605: FINAL	
KC AW	ard ?					Lead Unit:	Massachusetts In	stitute of Tec	Award ID: Account:		023864-00001:	
					S	ponsor Name:	NIH		Last Up	odate:	02/16/15 12:3	31 PM by kszul
Award	Contacts	Commitments	Budget Versions	Payment, Rep	orts & Terms	Special Revie	w Custom Data	Comments, N	lotes & Attachments	Awa	rd Actions M	edusa
									time & money	e	xpand all col	apse all
	Key Person	nel and Credit	Split (1)	► show	<u> </u>							
	Unit Contac	ts (0)		► show	2							
1	Sponsor Co	ntacts (4)		▶ show	\							
	Central Adr	ninistration Co	ntacts (5)	► show	\							
						close						

Figure 21 – Contacts Tab

Commitments Tab

The **Commitments** tab contains three panels that identify financial commitments for the award:

- Cost Sharing
- Rates
- Preaward Authorizations

						PI:	Haskell, Edward		Document ID:S	tatus: 1114606:F	INAL
Awar	rd ?					Lead Unit:	Massachusetts In	stitute of Tec	Award ID: Acc	count: 023864-00	001:
						Sponsor Name:	NIH		Last Up	odate: 02/16/15	12:53 PM by ks
ward	Contacts	Commitments	Budget Versions	Payment, R	eports & Term	s Special Review	v Custom Data	Comments, N	lotes & Attachments	Award Actions	Medusa
				0			0	0		0	U
									time & money	expand all	collapse all
					_				time & money	expand all	collapse all
Co	st Sharing			▶ show					time & money	expand all	
_									time & money	expand all	
_	st Sharing			► show	<u></u>				time & money	expand all	
Ra	ites	thorizations							time & money	expand all	

Figure 22 – Commitments Tab

Budget Versions Tab

The **Budget Versions** tab will display Award Budget(s) created for the award. The **Budget Versions** tab consists of three panels: **Budget Overview**, **Budget Versions**, and **Budget Limits**.

KC Award			PI: Haske		ute of Tec	Document ID:Statu Award ID: Accoun		
			or Name: NIH				a: 12/07/14 05:	
Award Contacts Commitments Budget Versions	Payment, Reports &	& Terms	Special Review	Custom Data	Comments	s, Notes & Attachments	Award Actions	Medusa
						time & money	expand all col	lapse all
Budget Overview (023854-00002:)	▶ show							
Budget Versions (023854-00002:)	▶ show							
Budget Limits (023854-00002:)	▶ show							
4								

Figure 23 – Budget Versions Tab

Payment, Reports & Terms Tab

The **Payment, Reports & Terms** tab provides the means, in accordance with federal regulations and/or institutional polices, to maintain detailed invoice, payment schedules, reports, terms, and other related information about the award.

There are six panels on the Payment, Reports & Terms tab:

- Payment & Invoices
- Contract And Grants Billing (not used at MIT)
- Reports
- Terms
- Special Approval
- Closeout

					-	PI:	Haskell, Edwar	d	Document ID:	Status:	1114607	FINAL
KC AW	ard ?					Lead Unit:	Massachusetts	Institute of Tec	Award ID: A	ccount:	023864-0	00001:
						Sponsor Name:	NIH		Last U	/pdate:	02/16/15	5 03:40 PM by kszu
Award	Contacts	Commitments	Budget Versions	Payment, Report	s & Terms	Special Review	Custom Data	Comments, Not	es & Attachments	Award	Actions	Medusa
									time & money	e	pand all	collapse all
F	ayment &	Invoices		▶ show								
0	Contract A	nd Grants Billin	g	▶ show								
F	Reports			▶ show								
Т	erms			▶ show								
s	opecial App	oroval		▶ show								
C	Closeout			▶ show								
)

Figure 24 – Payment, Reports & Terms Tab

Special Review Tab

The **Special Review** tab contains information required for regulatory compliance. Special review types, approval status, relevant protocol number, and key date information is displayed, along with access to any comments provided by reviewers.

~ .						PI: Has	ell, Edward		Document ID:Statu	IS: 1114609: FIN	AL
C Awar	rd ?				Lea	ad Unit: Mas	achusetts Instit	tute of Tec	Award ID: Accour	nt: 023864-0000	1:
					Sponsor	Name: NIH			Last Updat	e: 02/16/15 04:	48 PM by ks
Award	Contacts	Commitments	Budget Versions	Payment, Reports	& Terms Sp	pecial Review	Custom Data	Comment	s, Notes & Attachments	Award Actions	Medusa
									time & money	expand all co	llapse all
									time & money	expand all co	llapse all
Spe	oecial Rev	iew		▼ hide					time & money	expand all co	
_				▼ hide					time & money	expand all co	?
_	pecial Rev	iew									
_	pecial Rev	iew * Type	* Approval Sta		Number	Applicatio	Date Ap	op r oval Dat			?
_	ecial Rev	iew	* Approval Sta Approved		Number	Applicatio		pproval Dat 02/01/2015			?

Figure 25 – Special Review Tab

Note: PI's and their DLC administrators should notify their RAS Contract Administrator of any required maintenance to the special reviews for this project, especially adding new approved protocols. Maintenance to protocols should be processed through requests to the appropriate IRB (Internal Review Board) office (COUHES or the CAC).

Custom Data Tab

The **Custom Data** tab is where any award specific information is maintained from custom elements created in the system. It is used for internal processing to support data processing requirements.

						PI:	Haskell, Edward		Document ID:Status:	: 1114609:FIN/	AL.
Awa	ard ?					Lead Unit:	Massachusetts Insti	tute of Tec	Award ID: Account:	: 023864-0000	L:
					Spon	sor Name:	NIH		Last Update:	: 02/16/15 04:	48 PM by ksz
vard	Contacts	Commitments	Budget Versions	Payment, Repor	ts & Terms	Special Rev	view Custom Data	Comments	, Notes & Attachments	Award Actions	Medusa
									time & money	expand all col	lapse all
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0	ther					🔻 hid	e \				
					_	_		_			?
	ther										2
		Name: Other		_	_	_					
		Name: Other					-				
		Name: Other		ARRA		Source (TAS					
		Name: Other		ARRA	W3C F	unding Leve	el:				
		Name: Other			W3C F Subjec	unding Leve ct to E-Verif	el: y:				
		Name: Other		3	W3C F Subjec K Equipme	unding Leve ct to E-Verif ent Threshol	el: y: d:				
		Name: Other		3	W3C F Subjec K Equipme AAA_AWA	unding Leve ct to E-Verif nt Threshol RD_NUMBE	el: y: d: R:				
		Name: Other		3	W3C F Subjec K Equipme AAA_AWA ARRA Sj	unding Leve ct to E-Verif ent Threshol RD_NUMBE ponsor DUN	21: y: d: R: S:				
		Name: Other		3	W3C F Subject K Equipme AAA_AWA ARRA Sj Subcon	unding Leve ct to E-Verif nt Threshol RD_NUMBE ponsor DUN tract Placed	el: y: d: R: S:				
		Name: Other		3	W3C F Subjec K Equipme AAA_AWA ARRA Sj Subcon Prime Aw	unding Leve ct to E-Verif nt Threshol RD_NUMBE ponsor DUN tract Placed vard Numbe	el: y: d: R: S: l:: r:				
		Name: Other		3 COEUS_	W3C F Subject K Equipme AAA_AWA ARRA Sj Subcon Prime Aw RCR Conf.	unding Leve ct to E-Verif ent Threshol RD_NUMBE ponsor DUN tract Placed vard Numbe Rec'd or NF	el: y: d: R: S: l:: r: t::				
		Name: Other		3 COEUS_	W3C F Subject K Equipme AAA_AWA ARRA Sj Subcon Prime Aw RCR Conf. Use of Inte	unding Leve ct to E-Verif ent Threshol RD_NUMBE ponsor DUN tract Placed vard Numbe Rec'd or NF erest Incom	el: y: d: R: S: l:: r: t:: e: 0				
		Name: Other		3 COEUS_	W3C F Subject K Equipme AAA_AWA ARRA Sy Subcon Prime Aw RCR Conf. Use of Inte	unding Leve ct to E-Verif int Threshol RD_NUMBE ponsor DUN tract Placed vard Numbe Rec'd or NF erest Incom RRA Fundin	el: y: d: R: S: l:: r: e: g: g:				
		Name: Other		3 COEUS_ *	W3C F Subject K Equipme AAA_AWA ARRA SJ Subcon Prime Aw RCR Conf. Use of Inte A Bi	unding Leve ct to E-Verif ant Threshol RD_NUMBE ponsor DUN tract Placed vard Numbe Rec'd or NF erest Incom RRA Fundin lling Elemen	eli yi d: S: S: I:: I:: I:: I:: I:: I:: I:: I::				
		Name: Other		3 COEUS_ *	W3C F Subject K Equipme AAA_AWA ARRA Sy Subcon Prime Aw RCR Conf. Use of Inte Bi guipment I	unding Leve ct to E-Verif nt Threshol RD_NUMBE ponsor DUN tract Placed vard Numbe Rec'd or NF erest Incom RRA Fundin ling Elemer Period Ende	el: y: d: R: S: ::: ::: ::: ::: ::: :::				
		Name: Other		3 COEUS_ *	W3C F Subject K Equipme AAA_AWA ARRA Sj Subcon Prime Aw RCR Conf. Use of Inte A Bi quipment I CC	unding Leve ct to E-Verif ant Threshol RD_NUMBE ponsor DUN tract Placed vard Numbe Rec'd or NF erest Incom RRA Fundin lling Elemen	elt y: d: S: :: :: :: :: :: : : : : : :				

Figure 26 – Custom Data Tab

Comments, Notes & Attachments Tab

Comments, Notes & Attachments tab displays comments, notes, and the attachments associated with the award. Attached documents may be restricted and unrestricted to viewing.

There are three panels on the **Comments**, **Notes & Attachments** tab:

- Comments
- Notes
- Attachments

						PI:	Haske	ll, Edward		Document I	D:Status	5: 1114611:FIN	AL
C Awa	ard ?					Lead Unit:	Massa	chusetts Institu	ite of Tec	Award ID:	Account	t: 023864-0000	1:
					Spon	sor Name:	NIH			Las	t Update	2: 02/16/15 05:	07 PM by k
Award	Contacts	Commitments	Budget Versions	Payment, Report	s & Terms	Special Re	view	Custom Data	Comment	s, Notes & Attacl	nments	Award Actions	Medusa
Doci	cument was	successfully rel	oaded.							time 8 mon		aveaue all	llages all
• Doci	ument was	successfully rel	oaded.							time & mon	ey	expand all co	llapse all
_	cument was	successfully rel	oaded.	▶ show						time & mon	ey	expand all co	
Co	omments	successfully rel	oaded.							time & mon	ey	expand all co	
Co		successfully rel	oaded.	▶ show						time & mon	ey	expand all co	
	omments		oaded.							time & mon	ey	expand all co	

Figure 27 – Comments, Notes & Attachments Tab

Awards Actions Tab

Awards Actions tab includes information on the Award Hierarchy the Award is part of, as well as it allows you to Print award notices containing all or selected award components, including award modifications, if any, as well as award time and money transactions. Additionally, the Award document workflow status, actions take, and future action requested can be viewed in this section.

There are four panels on the **Award Actions** tab:

- Data Validation
- Hierarchy Actions
- Award Hierarchy Sync (only if Award Hierarchy exists; if the award is single level award then this panel will not be shown)
- Print
- Route Log

						PI:	Haskell, Edw	ard	Document ID:Stat	us: 1114615:FINAL	
KC A	ward 🕐					Lead Unit:	Massachuset	ts Institute of Tec	Award ID: Accou	nt: 023864-00001:	
						Sponsor Nam	e: NIH		Last Update:	02/16/15 05:50 PM by k	szulo
Awa	rd Contacts	Commitments	Budget Versions	Payment,	Reports & Terms	Special Review	Custom Data	Comments, Not	es & Attachments	Award Actions Medusa	1
• •		iccessfully reloade	d.		<u>_</u>				time & money	expand all collapse all	
	Data Validatio	n		▶ show							
ſ	Hierarchy Act	ions		► show	7						
ſ	Award Hierar	chy Sync		▶ show	2						
ſ	Print			▶ show	2						
ſ	Route Log			► show	<u> </u>						

Figure 28 – Award Actions Tab

Medusa Tab

The **Medusa** tab displays the entire project lifecycle. It is a snapshot/overview of an award and proposal structure showing all of the KC module relationships in a simple, expandable/collapsible tree format. Not only can you research back in time the lifecycle of a project, but also Medusa has the added capability of allowing you to link into the details that are maintained in Kuali Coeus, so you can research the complete record. Access Medusa to better understand the relationship between Kuali Coeus modules and to seamlessly navigate to and from the award and the proposal details.

There are two distinct sections in the page display:

- View: Allows for selection of **Proposal>Award** or **Award>Proposal** options and a **refresh** button that refreshes the tree view below based on your selection.
- **Tree**: Displays a hierarchical view of related documents that you can expand and collapse to see their relationships

				PI:	Hask	ell Ed	ward	Document ID:Stat	tus: 1111834:FI	NAL
ward ?				Lead Unit	t: Cent	er for	Coeus Training	Award ID: Accou	int: 023859-000	01:
				Sponsor Na	me: NIH			Last Update:	01/19/15 01	L:40 PM by a
rd Contacts Commi	itments Budget \	Versions Pa	yment, Reports & Terms	Special Review	Custom E	ata	Comments, No	tes & Attachments	Award Actions	5 Medusa
								time & money	expand all c	collapse all
Medusa		▼ 1	nide							
)
Medusa								R Colla	apse All • Expand	?
View:	۲	Proposal >	Award				• Award > Pr			refresh
		Proposal >	Award				O Award > Pr			
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CDevelopment Proposa	al 15060041 posal 24808	9 Proposal >	Award				O Award > Pr			
Development Proposa	al 15060041 posal 24808 0001	Proposal >	Award				O Award > Pr			
CDevelopment Proposa Ward 023859-00	al 15060041 Iposal 24808 0001 551	Proposal >	Award				O Award > Pr			
Development Proposa	al 15060041 Iposal 24808 0001 551	Proposal >	Award				O Award > Pr			

Figure 29 – Medusa Tab

Getting Help:

RAS Contract Administrator

To help with questions regarding Proposals and Award details, contact your RAS Contract Administrator.

Kuali Coeus Support Team

ra-help@mit.edu

KC system issues and authorizations - include your **Name**, **Contact information**, and the **Award Number** you are working on.