

**Overview:**

The following are minimum requirements for routing a proposal for approval using Kuali Coeus (replacing the MIT Proposal Summary Form). 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), including proposals that require line item details to feed to Grants.Gov, please refer to <https://ras.mit.edu/grant-and-contract-administration/preparing-and-submitting-proposal> for submission requirements and instructions.

**Procedure:**
**General Info**

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

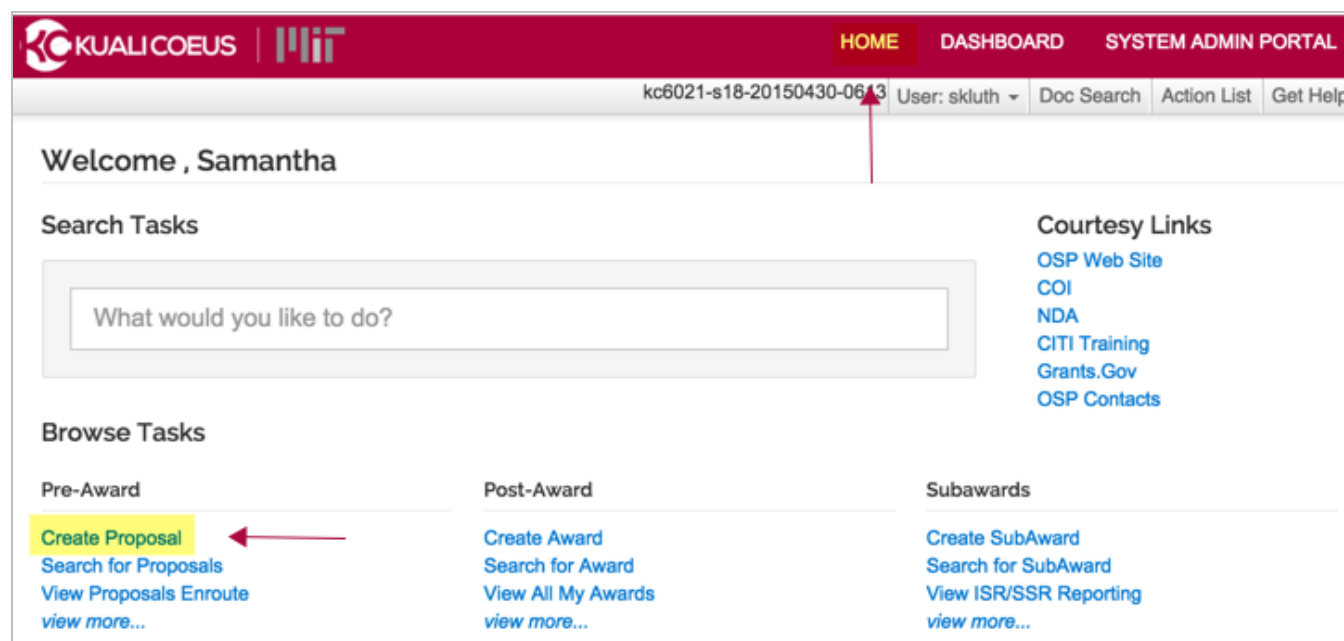


Figure 1 – Accessing the Create Proposal Link

- After clicking the **Create Proposal** link, 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**.
- A pop-up window will appear, enter all of the required information. The required fields will have a red asterisk next to the field name

Figure 2 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 <b>mm/dd/yy</b> 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	<b>Agency/Sponsor</b> is the organization providing funding. Enter sponsor's 6-digit code or click <b>Search</b> to find it.

Table 1 Required fields for saving a proposal

**Proposal Details**

\* indicates required fields

1 **Proposal Type:** \* Resubmission

Lead Unit: 150001 - Center for Coeus Training

2 **Activity Type:** \* Organized Research

3 **Project Dates:** \* 01/01/2017 to 12/31/2018

4 **Project Title:** \* Psychic Rats: Do they know we're coming for them?

5 **Sponsor:** \* 000340 NIH

A **Prime Sponsor Code:**

B **Award ID:**

C **Original Institutional Proposal ID:**

Save Save and Continue Close

Figure 3 – 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 <b>mm/dd/yy</b> 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	<b>Agency/Sponsor</b> is the organization providing funding. Enter sponsor's 6-digit code or click <b>Search</b> to find it.
Conditionally Required	Description
A Prime Sponsor Code	<b>Prime Sponsor</b> , 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.
B 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 2 Required and 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 4 – 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 data is used to aid federal and institutional annual reporting requirements.
3 Action Buttons	Available Action Buttons.
Conditionally Required	Description
1 Sponsor Deadline	The Sponsor-specified due date (in solicitation announcement or instructions) for this submission. <b>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.</b>
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 <i>Notice of Opportunity</i> 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 3 Sponsor and Program Required Fields

## Organization

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

The screenshot shows the 'Organizations & Locations' tab in the Kuali Coeus system. The left sidebar has a 'Basics' menu with 'Organization and Location' selected, indicated by a red circle and the number 1. The main content area shows the 'Applicant Organization' details for the Massachusetts Institute of Technology. The details include: Organization Name (Massachusetts Institute of Technology), Address Line 1 (77 Massachusetts Ave.), Address Line 2 (NE18-901), Address Line 3, City (Cambridge), State (MA), and Postal Code (02139-4307). Below the details is a section for 'Add Congressional District' with a dropdown menu showing 'MA-007', highlighted by a red arrow. At the bottom are buttons for 'Back', 'Save', 'Save and Continue', and 'Close'.

Figure 5 – Organization & Locations Tab

2. To view the **Congressional District** details, click the **arrow** next to the District.
3. 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.
4. Click the **Add Organization** link.
5. Conduct a search using any of the fields found on the Lookup Window, and click **Search**.
6. If you need to manually enter a new address, click the **Add New Address Book** button.

The screenshot shows the 'Organization Lookup' window. The window is titled 'Lookup' and 'ADDRESS BOOK LOOKUP'. It contains several input fields: Address Book Id, Sponsor Code, Sponsor, Organization, Last Name, First Name, Middle Name, and Address Line 1. A red circle and the number 2 are next to the 'Add New Address Book' button. A red arrow points to the 'Search' button at the bottom. The window also has 'Close', 'Clear Values', and 'Search' buttons at the bottom.

Figure 6 – Organization Lookup

7. 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 7 – Other Organizations Tab

8. If necessary, click the **Add Congressional** District button.
9. Click the **save** button or the **Save and Continue** button.

Figure 8 – Add Line Pop-Up Window

Please note, these fields are conditionally mandatory should you need to add a Performance Site Location.

Required Field Name	Description
1 Address	For Other Organization click <b>Search</b> to search for address. For Performance Site click <b>Find Address</b> .
2 Add New Address Book	Manually enter Location for Performance Site.
3 Organization Location	Select the appropriate type (Performance Site or Other Organization) from the drop- down list.
4 State	The corresponding state that pertains to the Congressional District.

Table 4 Organization required fields

## 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.

The screenshot shows the 'Proposal Development' interface for proposal #1589991. The 'Key Personnel' subpanel is selected in the left sidebar. A blue banner at the top of the main content area states 'Document was successfully saved.' Below this, the 'Key Personnel' section has a search bar and an 'Add Personnel' button, which is highlighted by a red arrow. The sidebar includes options for Basics, Key Personnel, Personnel, Compliance, Attachments, Questionnaire, Budget, Access, Supplemental Information, and Summary/Submit.

Figure 9 – Key Personnel screen

The screenshot shows the 'Add Personnel' window with the 'Search for' dropdown set to 'Employee'. The 'Last Name' field contains 'Haskell', highlighted by a red arrow. Other fields include 'First Name', 'User Name', 'Email Address' (pre-filled with 'user@domain.com'), 'Office Phone', 'Home Unit', and 'Campus Code'. At the bottom, there are 'Continue...' and 'Cancel' buttons, with a red arrow pointing to the 'Continue...' button.

Figure 10 – Add Personnel –Search Employee window

**Add Personnel**

Only the top 200 results were returned. If you cannot find what you are looking for, please refine the search criteria

Full Name:	User ID:	Email Address:	Unit Number:	Unit Name:	Organization:	City:
Haskell, Edward	haskelle	eddieh@mit.edu	150001	Center for Coeus Training Center for Coeus Training	Cambridge	
Haskell, Edward	haskelle	eddieh@mit.edu	150001	Center for Coeus Training Center for Coeus Training	Cambridge	
Haskell, Edward	haskelle	eddieh@mit.edu	150001	Center for Coeus Training Center for Coeus Training	Cambridge	
Haskell, Edward	haskelle	eddieh@mit.edu	150001	Center for Coeus Training Center for Coeus Training	Cambridge	
Haskell, Edward	haskelle	eddieh@mit.edu	150001	Center for Coeus Training Center for Coeus Training	Cambridge	
Haskell, Edward	haskelle	eddieh@mit.edu	150001	Center for Coeus Training Center for Coeus Training	Cambridge	

Showing 1 to 6 of 6 entries

First Previous **1** Next Last

Continue... Go back Cancel

Figure 11 – Add Personnel Search Personnel results window

**Add Personnel**

**Assign a role**

Assign a role: \*

- ☐ PI/Multiple
- ☐ Co-Investigator
- ☒ Key Person

Key Person's role will be: \*

Other Significant Contributor

Add Person Go back Cancel

Figure 12 – Add Personnel - Assign a role window

**Key Personnel**

Search for and add key personnel

Add Personnel COI Disclosure Status

Notify All

(PI/Contact) (Certification Incomplete)

Notify

Figure 13 Key Person after Add Person



**KUALICOEUS | MIT** | HOME | DASHBOARD | MAINTENANCE | SYSTEM ADMIN PORTAL

kc6011-s16-20150323-0016 User: dgarcia Doc Search Action List GET HELP

**Organization**

<b>Email Address:</b>	eddieh@mit.edu	<b>Office Location:</b>	E12-345
<b>Office Phone:</b>	617-253-1000	<b>Address Line 1:</b>	77 Massachusetts Ave
<b>Fax:</b>		<b>Address Line 2:</b>	
<b>Pager:</b>		<b>Address Line 3:</b>	
<b>Mobile:</b>		<b>City:</b>	Cambridge
<b>Primary Title:</b>	Professor	<b>County:</b>	Middlesex
<b>Directory Title:</b>	Professor	<b>Country:</b>	United States
<b>Home Unit:</b>	150001	<b>Postal Code:</b>	02139
<b>Division:</b>	Office of the Provost	<b>State:</b>	US - MASSACHUSETTS

Figure 14 – Key Personnel – Person Detail - Organization Tab

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**Extended Details**

**Personal Information**

<b>Age by Fiscal Year:</b>	0	<b>Race:</b>	
<b>KcPerson Id:</b>	710000001	<b>Is Handicapped:</b>	<input type="checkbox"/>
<b>Handicap Type:</b>		<b>Veteran:</b>	<input type="checkbox"/>
<b>Veteran Type:</b>		<b>Has Visa:</b>	<input type="checkbox"/>
<b>Visa Code:</b>		<b>Visa Type:</b>	
<b>Visa Renewal Date:</b>	mm/dd/yyyy	<b>Directory Department:</b>	150001
<b>Is Vacation Accrual:</b>	<input type="checkbox"/>	<b>Is on Sabbatical:</b>	<input type="checkbox"/>
<b>Id Provided:</b>		<b>Id Verified:</b>	
<b>Country of Citizenship:</b>		<b>Citizenship Type:</b>	US CITIZEN OR NONCITIZEN NATIONAL

Figure 15 – Key Personnel – Person Detail - Extended Details Tab

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kc6011-s16-20150323-0016 User: dgarcia Doc Search Action List GET HELP

**PI Proposal Certification Questions**

**Clear All Answers**

Is your current space sufficient to carry out this project, and those already proposed? ⓘ

☐ Yes

☐ No

Do you plan to carry out part of this work in any space other than that of the department, lab or center submitting this proposal? ⓘ

☐ Yes

☐ No

Will you need to assist individuals in a department, lab or center other than the one submitting this proposal? ⓘ

**Back Save Save and Continue Close**

Figure 16 – 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 <b>Notify All button</b> 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 <b>Extended Details</b> to review and update contact information. Add/Remove <b>Units</b> listed for routing for approval.
6	Certify View	Once an Investigator has completed the Certification (indicated by a green checkmark) you may click <b>View</b> to review the Certification responses.
Conditionally Required		Description
1	Key Person Role	If you select Key Person as Proposal Role, the <b>Key Person Role</b> field will display, with the person's directory title as default. Enter the person role on the project/program.  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.

Table 5 Investigator and Key Persons 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 17 Compliance Tab

Required Field Name		Description
1	Type	Select appropriate entry from pull-down menu.
2	Approval Status	Select <b>Pending</b> or <b>Not yet applied</b> approval status from pull-down menu.
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 6 Compliance Tab Human Subjects Protocol fields

# Questionnaire

Access the Questionnaire from the left navigation Subpanel. Complete the required sections as shown below.

Status: In Progress  
[more...](#)

✓ Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Help

Document was successfully saved.

BasicsKey PersonnelComplianceAttachmentsQuestionnaireBudgetAccessSupplemental InformationSummary/SubmitSuper User Actions

1

Questionnaire

Changed/Corrected Questionnaire Re-Routing Proposal Questionnaire

Changed/Corrected Questionnaire (Incomplete)

As compared to the original proposal submission, have you made any changes to the cost sharing, underrecovery or space needs for this proposal, or made any significant changes to the budget or scope of work?

Yes

No

ClearPrint

BackSaveSave and ContinueClose

Figure 18 Questionnaire screen

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

Table 7 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 19 – 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 <b>Activity Type</b> 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 <b>Under Recovery Distribution</b> 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 <b>Cost Sharing Distribution</b> from left navigation and enter source of funds. Detailed budget: populates from the budget line item details.

Table 8 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.

Proposal Development

Proposal: #34838

PI: [Redacted]

Document Info  
 Doc Nbr: 1699947  
 S2S Connected: Yes  
 Initiator: rhanlon  
 Status: In Progress  
[more...](#)

✓ Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

Budgets

The following budgets are linked to this proposal.

Name	Version	Direct Cost	F&A	Total	Start	End	Status	Comments	Actions
new	1						Incomplete		Action▼ View Summary Copy Print 1 Complete Budget 2 Include for Submission

Back Save Save and Continue Close

Figure 20 – Budget Screen . Actions menu options

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

## Attachments

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

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Budget Access Supplemental Information Summary/Submit Super User Actions

• Proposal (2): 1 messages

Proposal (1) Personnel (0) Abstracts (0) Internal (0) Notes (0)

Proposal (1) 1 messages

Add attachments to this proposal

+ Add 1

Upload & Add 2

Set All Statuses select

File	Type *	Status *	Description	Uploaded By	Posted Timestamp	Actions
1 Create Proposal Start Screen.png	Non-S2S (System to System) Scope of Work	Incomplete	Enter a Description of the Attachment	Garcia, Dave	03/25/2015 12:30 PM	Details view/edit rights

Back Save Save and Continue Close

Figure 21 – Attachments Tab

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

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

Figure 22 – 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.
Conditionally Required	Description
A Description	Conditionally required for some S2S Attachment types (those that allow multiple uploads of the same type).

Table 9 Attachments 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.

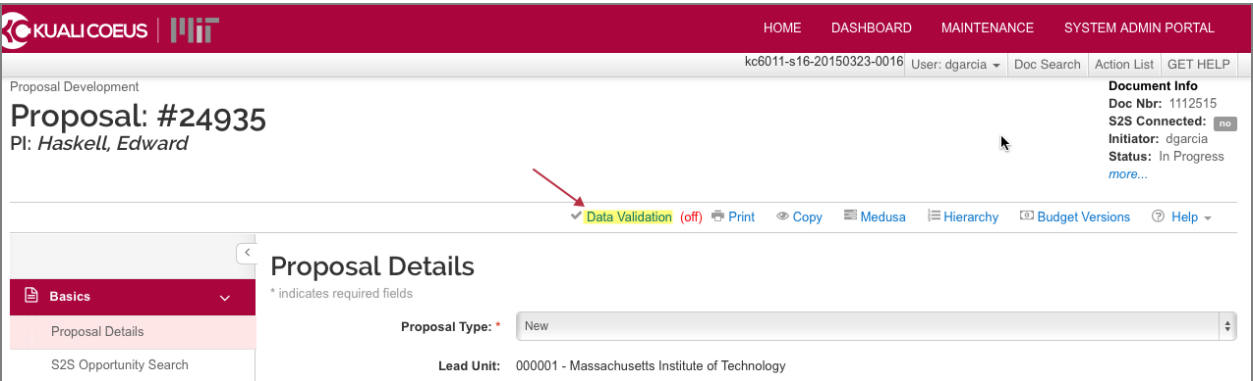


Figure 23 – Data Validation

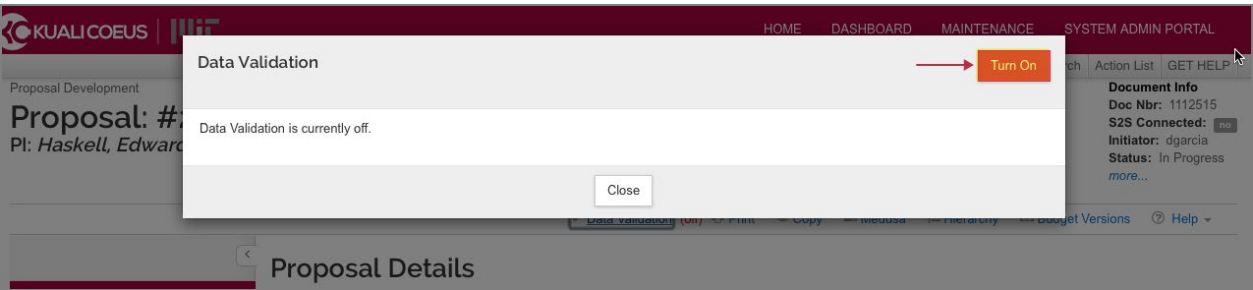


Figure 24 – Data Validation Turn On Button

Data Validation					Turn Off
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	
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 Questionnaire"	Error	Fix It	
Grants.Gov Error					
S2S Opportunity Search	Opportunity	/GrantApplication/Forms/RR_Budget10_1_3/BudgetJustificationAttachment is not valid in RR_Budget10_1_3	Grants.Gov Error	Fix It	

Figure 25 Data Validation On window

## Getting Help:

Email the Kuali Coeus Support Team at [kc-help@mit.edu](mailto:kc-help@mit.edu).  
**Please** include your **Name**, **Contact information**, and the **Proposal Number** you are working on.