All About Awards

Kuali Coeus Demo
- Kuali Coeus (KC): A Brief Overview
- Accessing and Navigating KC
- Searching for Awards in KC
  - Sorting & Saving Search Results
- Award Module Overview
  - Basic Guidelines
  - Note on KC Award IDs
- Viewing Awards
  - Award Details
  - Time & Money
  - Award Budget
  - Award Hierarchy
  - Printing
  - Medusa

All About Awards
kc-help@mit.edu
**Kuali Coeus** is an upgrade from Coeus and is a cradle-to-grave award management tool.
We will be using **Touchstone** for logging in via:
- Your MIT Kerberos account, or
- A MIT web certificate.

All About Awards
kc-help@mit.edu
The home page provides the option to search for **Awards** in the **Post-Award Menu Group** section.
The **Award Lookup** screen

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award ID</td>
<td></td>
</tr>
<tr>
<td>Sponsor Award ID</td>
<td></td>
</tr>
<tr>
<td>Account ID</td>
<td></td>
</tr>
<tr>
<td>Award Status</td>
<td></td>
</tr>
<tr>
<td>Sponsor ID</td>
<td></td>
</tr>
<tr>
<td>Sponsor Name</td>
<td></td>
</tr>
<tr>
<td>Award Title</td>
<td></td>
</tr>
<tr>
<td>Investigator</td>
<td></td>
</tr>
<tr>
<td>Lead Unit ID</td>
<td></td>
</tr>
<tr>
<td>Lead Unit</td>
<td></td>
</tr>
<tr>
<td>OSP Administrator</td>
<td></td>
</tr>
<tr>
<td>Archive Location</td>
<td></td>
</tr>
<tr>
<td>Archive Date From</td>
<td></td>
</tr>
<tr>
<td>Archive Date To</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The asterisk (*) wildcard is used in KC.
The search results will appear at the bottom of the **Award Lookup** screen.

- Sort by clicking on any column heading.
When viewing an award, among other information, you will see:

- The current **status** of the award
- A timestamp of the **last update**
- **Award ID** and **Award Version**
The **KC Award** record is comprised of:

- **Header**
- **Tabs**
- **Panels**
- **Time & Money**

### Tabs
- Document Overview
- Funding Proposals
- Details & Dates

### Panels
- **Time & Money**
- **Expand All**
- **Collapse All**

### Action Buttons
- Kuali Coeus Overview
- kc-help@mit.edu
**Tabs** represent different areas of information within the award.

**Panels** are the drop-down areas within a tab, where data is maintained.

Two areas that record:
- **Time & Money Transactions**
- **Approved Award Budget**
The **Award** tab provides a summary of award information.

- It includes information about funding proposals, subawards, dates, and the project’s sponsor and includes the following 6 panels:
The **Details & Dates** panel includes:

- View History button
- Current Action
- Institution
- Sponsor
- Sponsor Funding Transfer
- Time & Money
Clicking the **view history** button opens a new window in your browser, displaying the entire **Award History** in terms of **Award Versions** and **Transactions**.
The **Institution** subpanel includes award details:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Award ID</strong></td>
<td>KC-generated. The first 6 digits are the base award number. The next 5 digits are the award node number.</td>
</tr>
<tr>
<td><strong>Version</strong></td>
<td>New Award Version is assigned each time the Award is opened for edits after it has been finalized.</td>
</tr>
<tr>
<td><strong>Award Status</strong></td>
<td>Available status options are: Active, Inactive, Pending, Hold, Terminated, Closed, and Restricted-No Postings.</td>
</tr>
<tr>
<td><strong>Account ID</strong></td>
<td>7 digit WBS account number.</td>
</tr>
<tr>
<td><strong>Award Title</strong></td>
<td>The title of the Award.</td>
</tr>
<tr>
<td><strong>Lead Unit ID</strong></td>
<td>Lead Unit of the Award.</td>
</tr>
<tr>
<td><strong>Account Type</strong></td>
<td>MIT Account Types (e.g. Regular, Fabricated Equipment, No Account, etc.).</td>
</tr>
<tr>
<td><strong>Activity Type</strong></td>
<td>Award Activity Types (e.g. Organized Research, Other, etc.).</td>
</tr>
<tr>
<td><strong>Award Types</strong></td>
<td>MIT Award Type (e.g. Grant, Contract, etc.).</td>
</tr>
</tbody>
</table>

All About Awards
kc-help@mit.edu
The **Sponsor** subpanel includes:

<table>
<thead>
<tr>
<th><strong>Sponsor ID</strong></th>
<th>The MIT sponsor code and name. This field is populated from the Proposal Development module.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sponsor Award ID</strong></td>
<td>The award identifier number supplied by the sponsor and shown in the award document.</td>
</tr>
<tr>
<td><strong>Modification ID</strong></td>
<td>Used to record official updates to the award.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Prime Sponsor</strong></th>
<th>The sponsor code and name for the source of the sponsor’s prime award. This field is populated whenever MIT is the recipient of a subcontract or sub-grant.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CFDA Number</strong></td>
<td>Catalog of Federal Domestic Assistance number inserted at the award setup when the proposal includes Federal Assistance.</td>
</tr>
<tr>
<td><strong>NSF Science Code</strong></td>
<td>The National Science Foundation code. Used for Institutional and federal reporting.</td>
</tr>
</tbody>
</table>
The **Time & Money** subpanel includes:

<table>
<thead>
<tr>
<th>Award Effective Date</th>
<th>The effective date shown on the original award document.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project End Date</td>
<td>Expiration date of current funded period plus anticipated unfunded periods, including possible option years.</td>
</tr>
<tr>
<td>Execution Date</td>
<td>The date of final award execution.</td>
</tr>
<tr>
<td>Anticipated Amount</td>
<td>Sponsor funding anticipated for the entire project.</td>
</tr>
<tr>
<td>Obligation Start Date</td>
<td>Effective date for the current funding period.</td>
</tr>
<tr>
<td>Obligation End Date</td>
<td>End date for the current funding period.</td>
</tr>
<tr>
<td>Modification Date</td>
<td>The date the modification was received, if applicable.</td>
</tr>
<tr>
<td>Obligated Amount</td>
<td>Sponsor funding provided to date under the award. Does not include cost share.</td>
</tr>
</tbody>
</table>
The **Subaward** panel includes sections for:
- Budgeted Subcontracts
- Funded Subcontracts
The **Contacts** tab has four panels that list both MIT and Sponsor contacts, including:

- Key Personnel (from MIT Proposal)
- Unit Contacts (MIT)
- Sponsor Contacts
- Central Administration Contacts (MIT OSP)
The **Sponsor Contacts** panel displays the sponsor’s contact information associated with the award.

![Sponsor Contacts Table]

**Note:** Clicking on the **book** icon next to the **Person/Organization** name will display additional information about the Person/Organization.
The **Commitments** tab contains three panels:

- Cost Sharing
- Rate
- Preaward Authorizations
The **Payment, Reports & Terms** tab maintains detailed invoice, payment schedules, reports, terms, and other related information about the award.

- There are six panels on the **Payment, Reports & Terms** 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.
The **Comments, Notes & Attachments** tab displays comments, notes and attachments associated with the award.
Time & Money is used to manage money provided for a project.

- It shows the distribution of the obligated and anticipated amounts and tracks changes as the project progresses.
- Users can view award hierarchies and see exactly how funding is distributed throughout one or multiple awards for a project.
The **Award Hierarchy** panel provides a structured, graphical representation of a sponsored project in an expandable collapsible tree view.

- It tracks two categories of money information and the associated time period information for each *Award* in the *Hierarchy*:
  - **Obligated** (money available for spending), and
  - **Anticipated** (money expected for all periods).

![Award Hierarchy Panel](image)
The round symbol next to Award ID (of each node of the hierarchy) represents the Award Status:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>The award is active.</td>
</tr>
<tr>
<td>Pending</td>
<td>The award is pending.</td>
</tr>
<tr>
<td>Hold</td>
<td>The award is on hold.</td>
</tr>
<tr>
<td>Closed/Terminated/Restricted</td>
<td>The award is closed, terminated, or restricted.</td>
</tr>
</tbody>
</table>

The Transition Type Code listed is the most recent Time & Money transaction that took place on this particular Award.
Awards with child accounts have a drop-down list that defaults to the ‘Totals’ selection.

- The drop-down allows you to control the level of detail displayed in the Award Hierarchy.
**Totals**

**Obligated** – The total amount of the obligated award. This is the top level award account that can be distributed to the Sub-Parent and Child accounts.

**Anticipated** – The anticipated funding over the life of the project.

---

**Dates Only**

Displays date information only without any associated funding.
**Distributed / Distributable**

*Distributed* – The amount is has *been* distributed to Sub-Parent and Child accounts.

*Distributable* – The amount that is left to *be* distributed to Sub-Parent and Child accounts.
Award Budget is accessed from the Budget Versions tab of the Award.
The **Budget Overview** panel displays key dates and cost totals, limits, and sharing figures, providing a handy consolidated view of basic information about the budget.
Budget Versions tab displays information about the different Award Budget versions.

- Award Budgets can be submitted, approved, rejected, cancelled, and posted to the financial system from KC.

Parameters tab displays key identifying information about the Award Budget version and budget periods and totals.

- This page is displayed by default when the Award Budget document is first accessed.
The **Rates** tab displays the types of rates applied to **Award Budget** document.

- The Rate types and classes that appear are driven by the Award type, and what has been centrally maintained.
The **Summary** tab displays the budget details that have been entered on the **Award Budget Personnel** and **Non-Personnel** tabs.
The **Personnel** tab displays personnel related costs that are associated with the awarded research.

![Screenshot of the Personnel tab in the award budget interface]
The **Non-Personnel** tab displays personnel (*non specified personnel*) and non-personnel costs that are associated with the awarded research.
Back in the main **Award** record, the **Award Actions** tab includes the following panels.
The **Print** panel allows you to print the **Award Notice** containing all or just the selected award components, including award modifications, if any, as well as award time and money transactions.
In the **Award Notice** section of the **Print** panel, check the items you want to include in your **Award Notice** and then click **print**.
In the **Award Modification** section of the **Print** panel:

- select a version from the **Award Version** drop-down,
  and
- Transaction from the **Transaction** drop-down to print
The **Medusa** tab displays the entire Award structure.
To view details of the linked records, click on the **Award**, **Institutional Proposal**, **Proposal Development**, and **Subaward Number** link.
The **Current & Pending Support** report can be accessed from the **Home → View Current & Pending Support**.
- The **Current Support Report** includes current Award Information.
- The **Pending Support Report** includes proposals submitted to the Sponsor for funding, which are still in ‘Pending’ status.

All About Awards
kc-help@mit.edu
Identify the **individual** for whom to generate the Current & Pending Support report by clicking the **Look-Up** icon.

Once selected, the individual’s name will appear for each report category.
The **initiate report** button, generates results in a table within KC.

**Export Options**

save the information to the computer in one of the file formats.
The **print** button, generates a PDF document with the results.

### Current Support for Haskell, Edward

<table>
<thead>
<tr>
<th>Sponsor Award ID.</th>
<th>Sponsor</th>
<th>Role</th>
<th>Title</th>
<th>Award Amount</th>
<th>Effective Date</th>
<th>End Date</th>
<th>Effort %</th>
<th>Academic Year Effort %</th>
<th>Summer Year Effort %</th>
<th>Calendar Year Effort %</th>
</tr>
</thead>
<tbody>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>Award Hierarchy</td>
<td>$0.00</td>
<td>01/01/2015</td>
<td>12/31/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>Award Budget</td>
<td>$818,579.40</td>
<td>01/01/2015</td>
<td>12/31/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>All About Awards</td>
<td>$0.00</td>
<td>01/01/2015</td>
<td>12/31/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>All About Awards</td>
<td>$0.00</td>
<td>01/01/2015</td>
<td>12/31/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>Award Hierarchy</td>
<td>$0.00</td>
<td>01/01/2015</td>
<td>12/31/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>004999</td>
<td>Multi-Sponsored Consortium</td>
<td>PI</td>
<td>Consortium Master Agreement</td>
<td>$0.00</td>
<td>12/01/2014</td>
<td>11/30/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>Time &amp; Money</td>
<td>$0.00</td>
<td>01/01/2015</td>
<td>12/31/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>Award Budget + Child 1</td>
<td>$388,434.55</td>
<td>01/01/2015</td>
<td>12/31/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>Time &amp; Money</td>
<td>$0.00</td>
<td>01/01/2015</td>
<td>12/31/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000340</td>
<td>NIH</td>
<td>PI</td>
<td>All About Awards</td>
<td>$50,000.00</td>
<td>01/01/2015</td>
<td>12/31/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Kuali Coeus Overview

Questions

All About Awards
kc-help@mit.edu