



Welcome!

Log in to KC via:

- Username & Password found on your Log In Sheet

MIT KUALICOEUS

Welcome to Kual i Coeus: Proposal Development Training!

Here is some information you will need for the class.

To log-in to KC use the following:

Username: **user01**
Password: **user01**

KUALICOEUS | MIT

HOME DASHBOARD MAINTENANCE SYSTEM ADMIN PORTAL

kc6011-s16-20150330-0046 Doc Search Action List GET HELP

Login

UserName:

Password:

Login



Proposal Development

(Non-Grants.gov)

KC Hands-on Training



MIT OFFICE OF
SPONSORED
PROGRAMS

6-hour session

- 3 hour session in the morning
- 3 hour session in the afternoon

Learn how to prepare and submit a proposal in Quali Coeus that meets Institute and Sponsor requirements, compliance and policy standards.



Morning Session

- Quali Coeus Overview
- Accessing Quali Coeus
- Overview of Policies and Guidelines
 - Best Practices
- Hands on Exercises
 - Reading the RFP
 - Searching for Proposal
 - Creating a Proposal
 - Completing Proposal Details
 - Adding Attachments

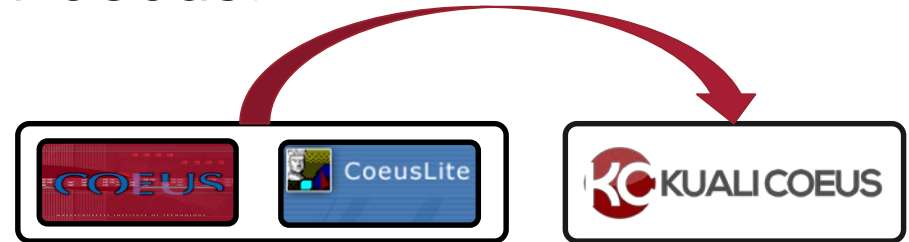


Afternoon Session

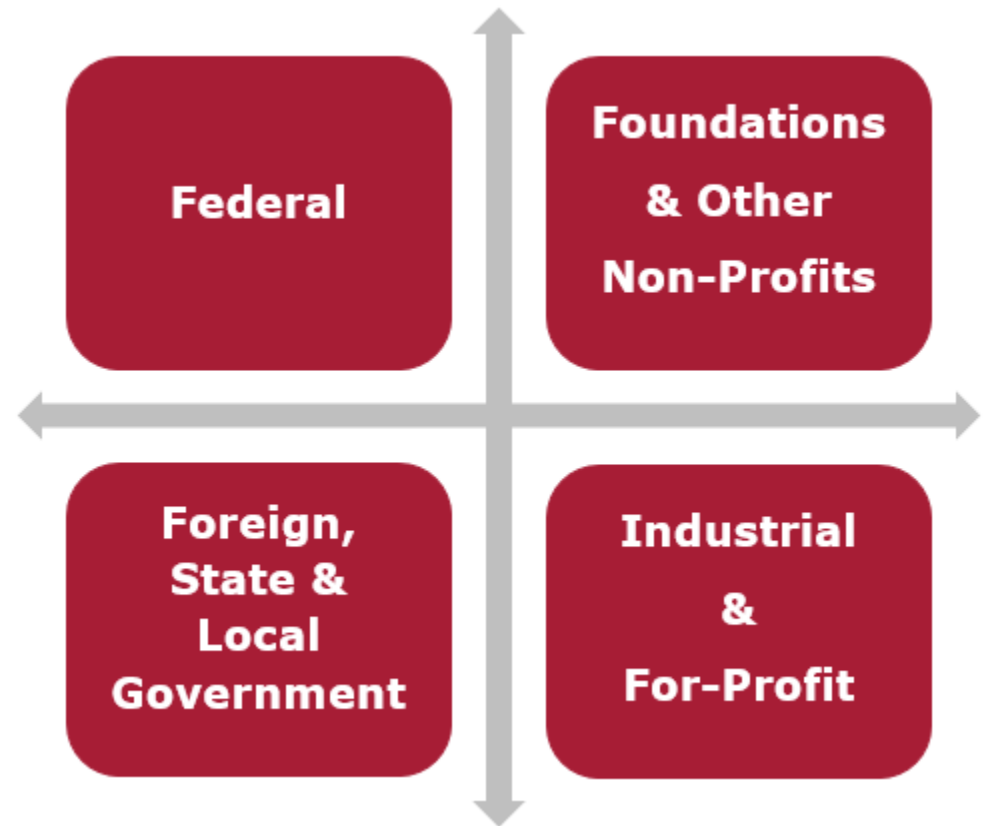
- Hands on Exercises
 - Assigning Roles
 - Creating a New Budget
 - Modifying Proposal Rates
 - Entering Personnel Budget Costs
 - Entering Non-Personnel Budget Costs
 - Autocalculating All Budget Periods
 - Adding Subcontract Costs
 - Distributing Cost Sharing and Underrecovery
 - Finalizing the Budget
 - Copying a Budget
 - Validation & Approval Status
- Next Steps & Additional Resources



- KC is the result of the partnership between the Kuali Foundation and Coeus Consortium and is based on Coeus functionality developed at MIT.
- KC is an **upgrade** from Coeus.
- Only one user interface.
- All Coeus Proposal and Award data will be migrated to KC by Go-Live.

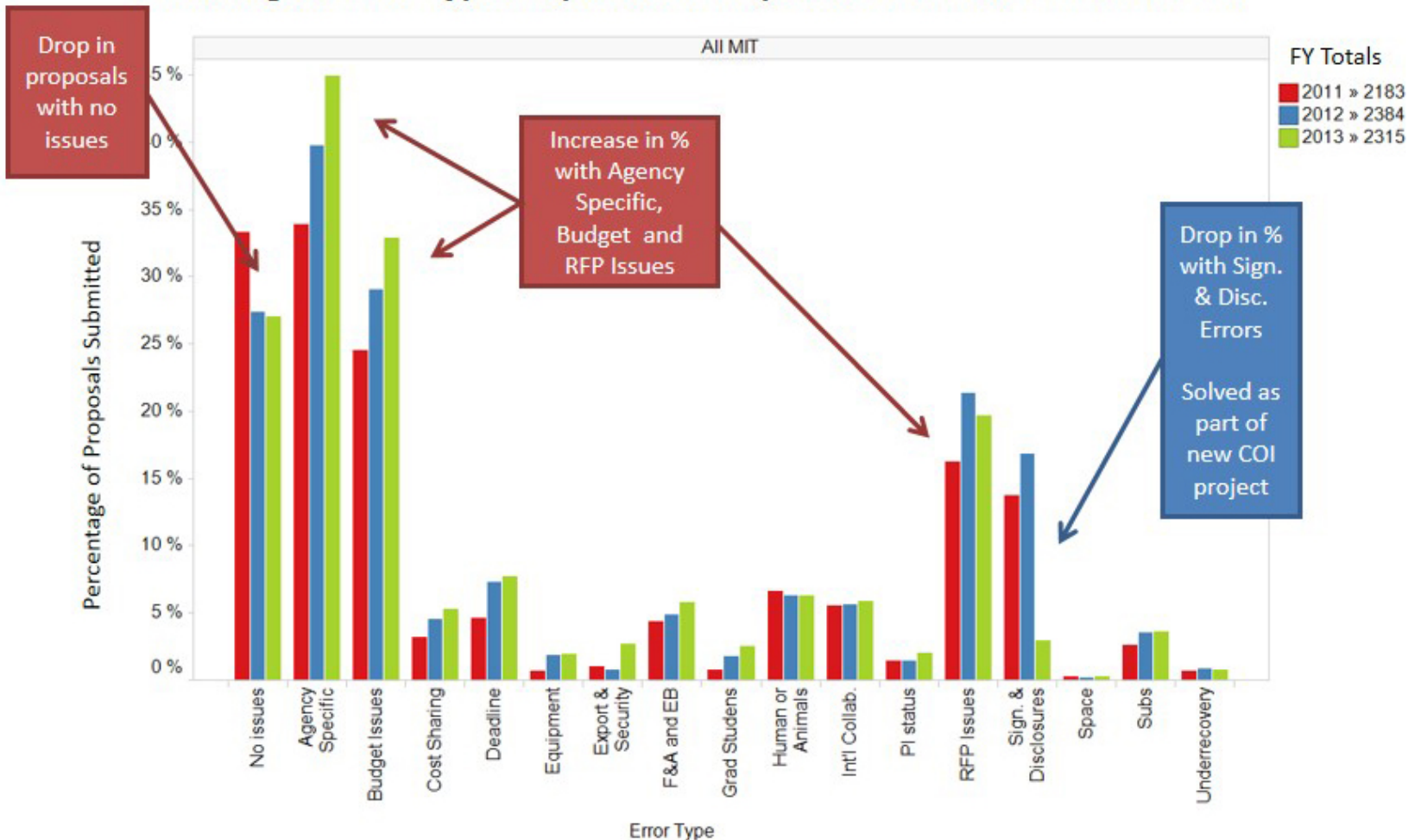


Proposals for each Sponsor type must be created and routed for review and approved in Kuali Coeus. Keep in mind that Sponsors are subject to different policies and regulations.



- KC is MIT's system of record.
 - All Proposals MUST be entered in KC.
- Create budgets with a robust budgeting tool.
 - A Detailed Budget in KC is required whenever the Sponsor requires a detailed budget.
- Route the proposal online for internal approvals.

Percentage of Error Types Reported on Proposals Submitted FY11 thru FY13




- **Routing for approval**
 - Make sure units requiring approval are included.
- **Attachments**
 - Incomplete/inaccurate.
- **Budget Justification**
 - Does not match the budget (make sure any changes are carried throughout proposal).
- **Faculty Effort**
 - Check OSP website for complete policies and guidelines. Be aware of differences between Academic Year effort and Summer effort.
- **Travel**
 - Provide details and purpose of each trip.

- Gather sponsor and proposal information from PI.
- Read sponsor RFP/Solicitation for requirements and guidelines.
- Create a plan for managing deadlines.
- Create Proposal in KC.
 - Meet compliance & policy requirements
 - Meet sponsor/opportunity requirements
 - Enter Budget information
 - Attach required documents
 - Validate and Submit for approval

DLC Proposal Checklist

- Helpful in the proposal preparation process.



**Kuali Coeus DLC Checklist
Quick Reference Card**

Overview:

This Quick Card serve as a list of items required, things to be done, or points to be considered when preparing to submit a proposal for OSP review. The checklist contains questions to ask the PI(s) concerning the proposal.

Notes:
 Per Institute policy, complete, final (not draft) proposals are due in OPS 5 full business days prior to a Sponsor's deadline date. DLCs may want to determine their own internal processes of when they need to have proposals in their office (for example, proposals may be due in DLC 2 days in advance of the OSP 5 business day deadline).

Who is the Sponsor?

Checkbox	Question
<input type="checkbox"/>	Federal?
<input type="checkbox"/>	Industrial?
<input type="checkbox"/>	Foundation/Non Profit – For Foundation sponsors, on research, non-research proposals, has PI been working with the MIT Foundation Relations Office? (Note – Fellowship proposals do not need to be discussed with Foundation Relations).
<input type="checkbox"/>	If the Sponsor is another university and/or the MIT PI will be submitting a subcontractor proposal, which is the Prime Sponsor (Federal, Industrial, and Foundation/Non Profit)? Where are the funds ultimately coming from?

Is this a new proposal (never submitted to this Sponsor)?

Checkbox	Question
<input type="checkbox"/>	If this is a resubmission of a proposal previously submitted to this Sponsor, what was the original MIT proposal #? (A resubmission proposal is when a proposal has been previously submitted to the Sponsor, but no award has been issued to MIT to date and there is no MIT Account #).

- DLC Administrative Officers must authorize “Proposal Create” privileges for users in their Unit/Department via Roles Database.
- **Touchstone** will be utilized to log into the system via:
 - your MIT Kerberos account, or
 - an MIT web certificate.

MIT

Select English

Please choose your account provider

MIT Kerberos account (or MIT web certificate) Continue

What is my account provider?

Do not remember selection.

Remember selection for this session.

Remember selection permanently, skip this page from now on.

Touchstone@MIT

test settings help

Welcome, please identify yourself to access MIT services.

Have an MIT certificate?

Use Certificate - Go

Always login with this

Certificates are your key to secure web services at MIT, (such as Benefits, Request Tracker, SAPweb, and WebSIS) and the preferred way to access MIT servers.

No certificate? Use Kerberos username

Username: @mit.edu

Password: Login

If you don't have a certificate installed on this machine, you may login using your MIT username (the B characters before your @mit.edu email address) and your Kerberos password.

Have Kerberos tickets?

Use existing tickets - Go


Always login with this

Using your Kerberos tickets to authenticate to MIT Touchstone requires correct browser configuration. This option is useful for Athena and WIN.MIT.EDU users.

- **Proposal Development Document, Proposal Document, Proposal E-Doc and Proposal** refer to the same thing in KC.
- **Document Number, Doc Nbr, and Document ID** are user interface terms that may be used interchangeably.

- Final, submit-able proposals must be received by OSP for approval **a minimum of 5 business days in advance of a sponsor specified deadline**. Failure to do so will require a waiver from your Dean or VPR.

Five-Day Calculator

Proposal Due Date:	Mon Jun 01 2015	
Date Due to OSP:	Mon May 25 2015	

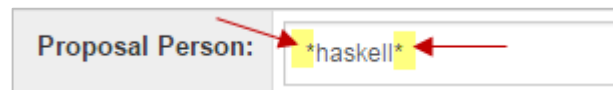
- Read opportunity solicitation and instructions!
 - The greatest number of errors identified during proposal review are related to FOA instructions.



- Do NOT use the **Back or Forward** buttons on the web browser when navigating in KC.



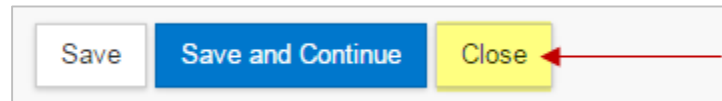
- Use * as a wildcard when searching KC.



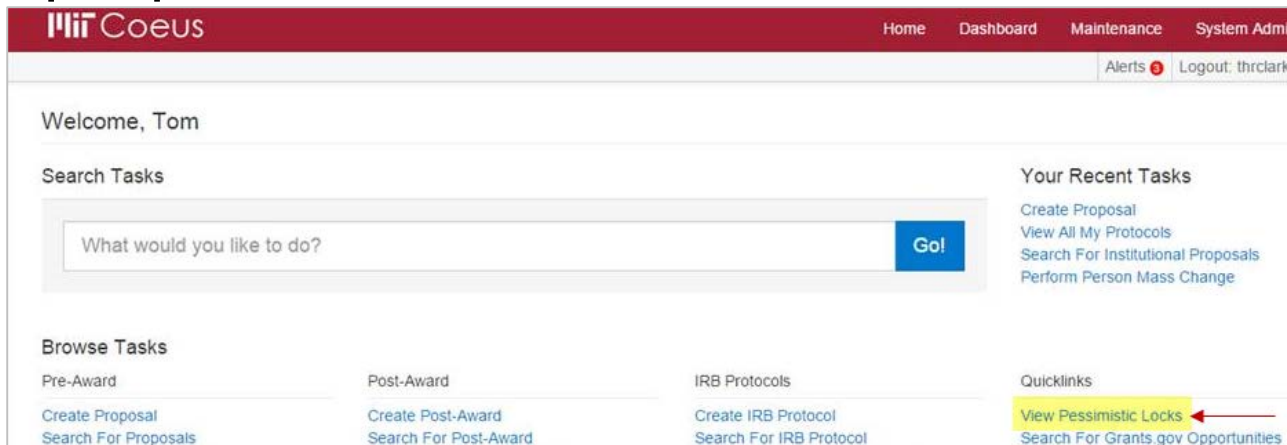
- **Save** often when entering proposals in KC.



- Close out of the proposal by clicking the **close** button at the bottom of the proposal screen to avoid placing a lock on the proposal.



- Access *Pessimistic Lock* to delete locks you put on a proposal.



- For assistance with proposals, awards, COI and other policy related questions, please contact your **OSP Contract Administrator**.
- For KC technical assistance please send email to kc-help@mit.edu and CC **your Contract Administrator**, include:
 - Proposal #
 - Your Name
 - Your Phone Number

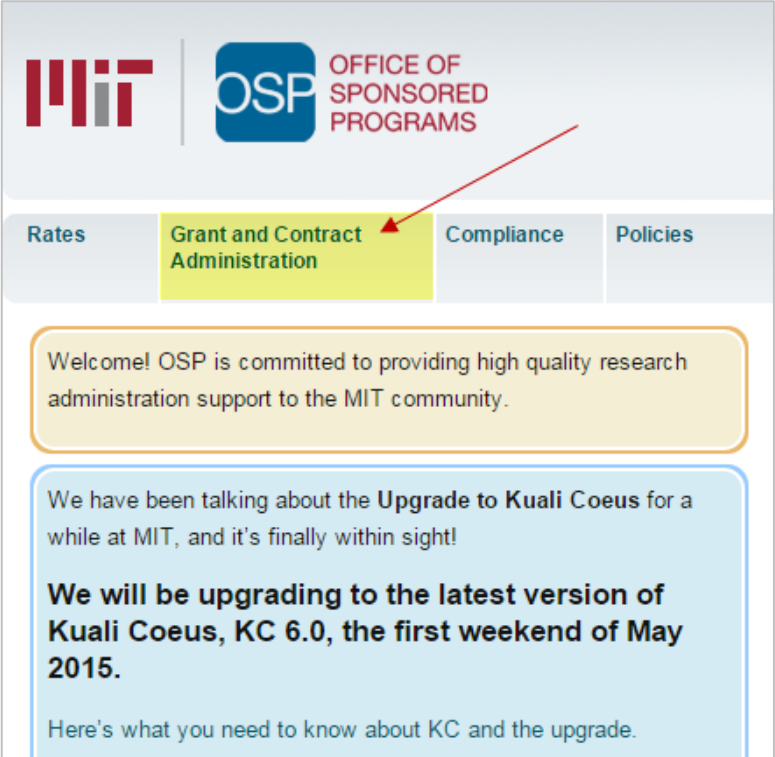


– Kuali Coeus Website

– OSP Website

osp.mit.edu

- Grant and Contract Administration
 - Preparing and Submitting Proposals
 - Roles and Responsibilities



MIT | OSP OFFICE OF SPONSORED PROGRAMS

Rates Grant and Contract Administration Compliance Policies

Welcome! OSP is committed to providing high quality research administration support to the MIT community.

We have been talking about the Upgrade to Kuali Coeus for a while at MIT, and it's finally within sight!

We will be upgrading to the latest version of Kuali Coeus, KC 6.0, the first weekend of May 2015.

Here's what you need to know about KC and the upgrade.

– Join the Research Administration Listserv (ra_Is)

- osp.mit.edu → About OSP → RA Listserv (<http://osp.mit.edu/about-osp/ra-listserv>)
- Updates KC Implementation, Training, OSP Forums, Uniform Guidance, etc.

– Sponsored Research Training

- <http://osp.mit.edu/help-and-training/sponsored-research-training>



Questions

