



# Welcome!

Log in to KC via:

- Username & Password found on your Log In Sheet

**Welcome to Kuali Coeus: S2S 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**

**Login**

UserName:

Password:

HOME DASHBOARD MAINTENANCE SYSTEM ADMIN PORTAL

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



# Proposal Development

(S2S - 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 KC via System-to-System (S2S) that meets Institute and Sponsor requirements, compliance and policy standards.



# Morning Session

- KC Overview
- Accessing KC
- Overview of Policies and Guidelines
  - Best Practices
- Hands on Exercises
  - Reading the FOA
  - Searching for Proposal
  - Creating a Proposal
  - Connecting to Grants.gov
  - Completing Proposal Details
  - Adding Attachments

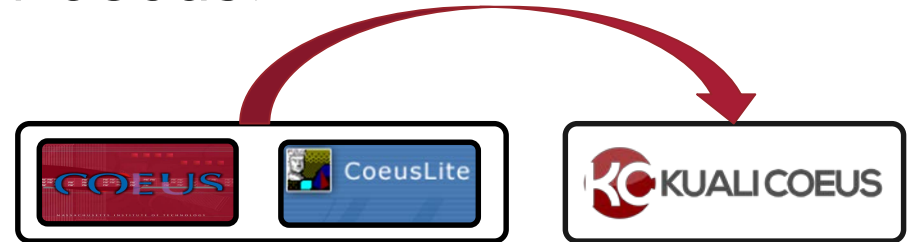


# Afternoon Session

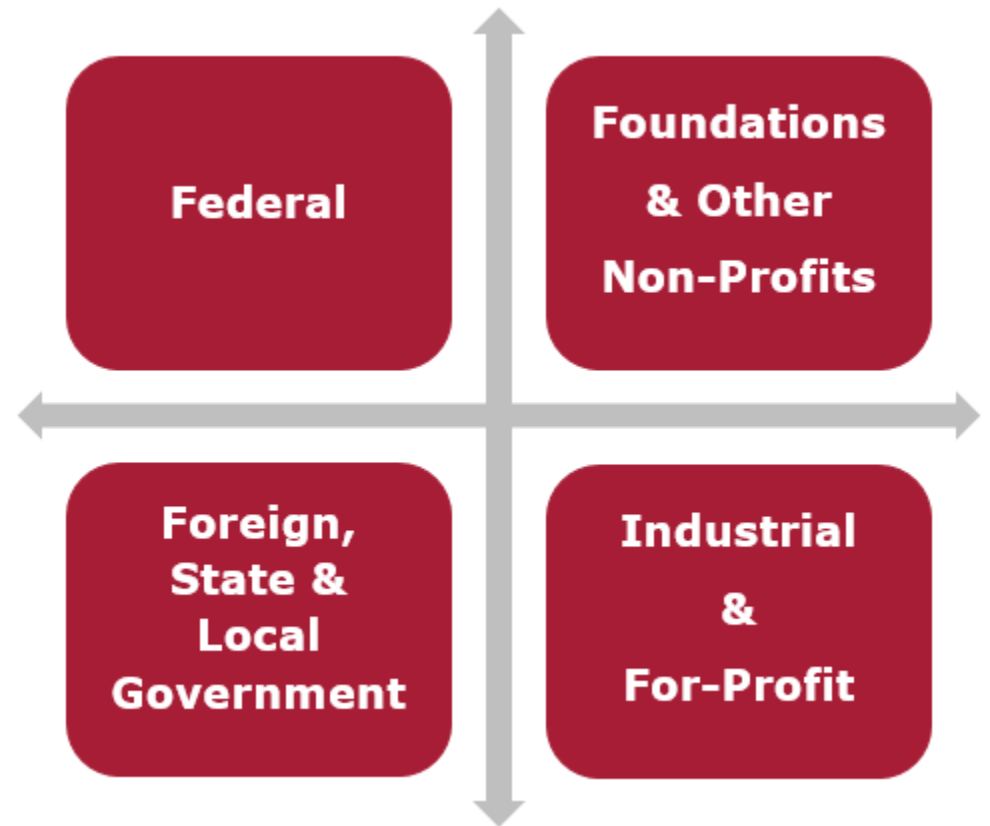
- Hands on Exercises
  - Assigning Roles
  - Creating a New Budget
    - Modifying Budget Rates
    - Entering Personnel Budget Costs
    - Entering Non-Personnel Budget Costs
    - Autocalculating All Budget Periods
    - Uploading Subaward Budget Form
    - Distributing Cost Sharing
    - Finalizing the Budget
  - Copying a Budget
  - Validation & Approval Status
    - S2S Validations
- 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.



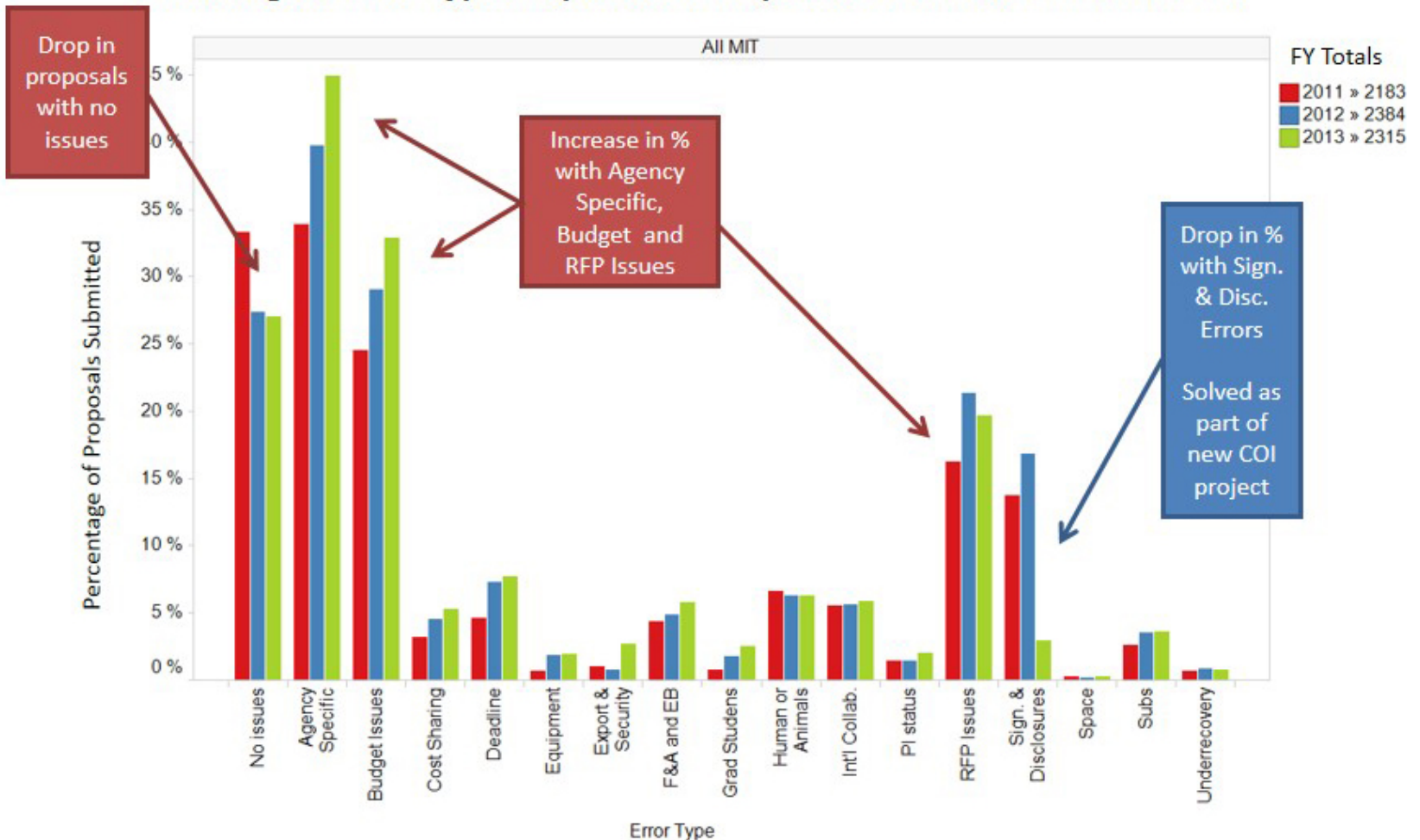
Proposals for each Sponsor type must be created and routed for review and approved in KC. Keep in mind that Sponsors are subject to different policies and regulations.



- 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.
- Grants.gov Forms are automatically populated with data entered in KC and HR information maintained by MIT.
- S2S validations and submission.
- Route the proposal online for internal approvals and S2S submission to Sponsor.



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 FOA 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 and S2S Submission

## 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"/>	<b>Federal?</b>
<input type="checkbox"/>	<b>Industrial?</b>
<input type="checkbox"/>	<b>Foundation/Non Profit</b> – For Foundation sponsors, on research, non-research proposals, has PI been working with the MIT Foundation Relations Office? (Note – Fellowship proposals <b>do not</b> 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, <b>which is the Prime Sponsor (Federal, Industrial, and Foundation/Non Profit)?</b> 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 <b>resubmission</b> of a proposal previously submitted to this Sponsor, <b>what was the original MIT proposal #?</b> (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.

The image displays two overlapping screenshots of the MIT Touchstone@MIT login interface. The left screenshot shows the account provider selection screen, where the user has selected 'MIT Kerberos account (or MIT web certificate)' and is ready to click 'Continue'. The right screenshot shows the main login page with three options: 'Use Certificate - Go', 'No certificate? Use Kerberos username', and 'Use existing tickets - Go'. Red arrows point to the 'Use Certificate - Go' button and the 'Login' button in the Kerberos section.

- **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	

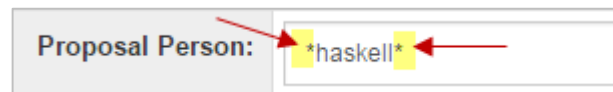
- Read opportunity solicitation and instructions!
  - The greatest number of errors identified during proposal review are related to FOA instructions.



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



- Use \* as a wildcard when searching KC.

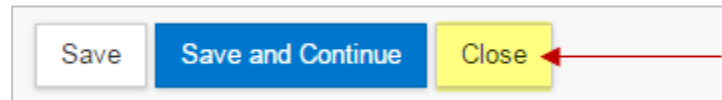


- **Save** often when entering proposals in KC.

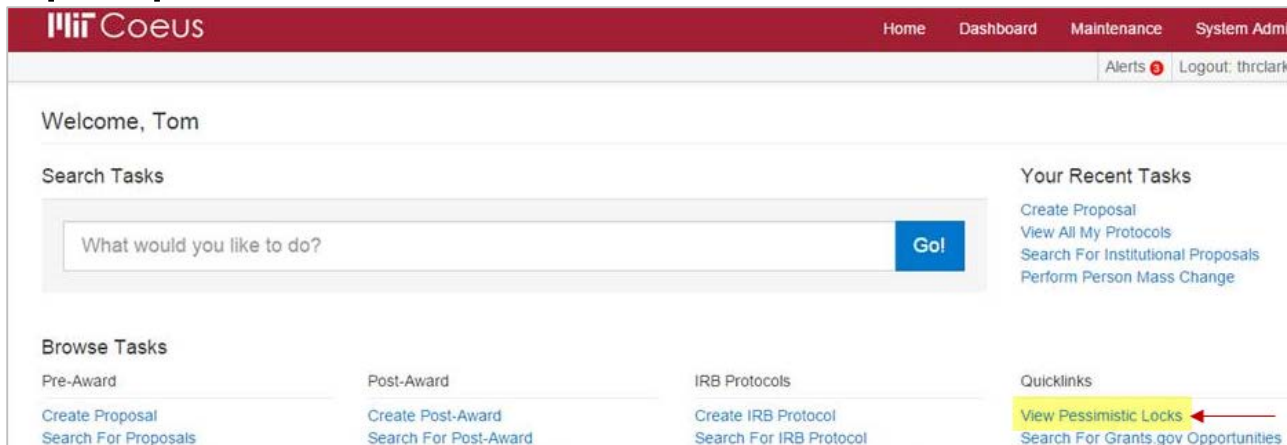




- Close out of the proposal by clicking the **close** button at the bottom of the proposal screen to avoid placing a lock on the proposal.



- 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](mailto:kc-help@mit.edu) and CC **your Contract Administrator**, include:
  - Proposal #
  - Your Name
  - Your Phone Number

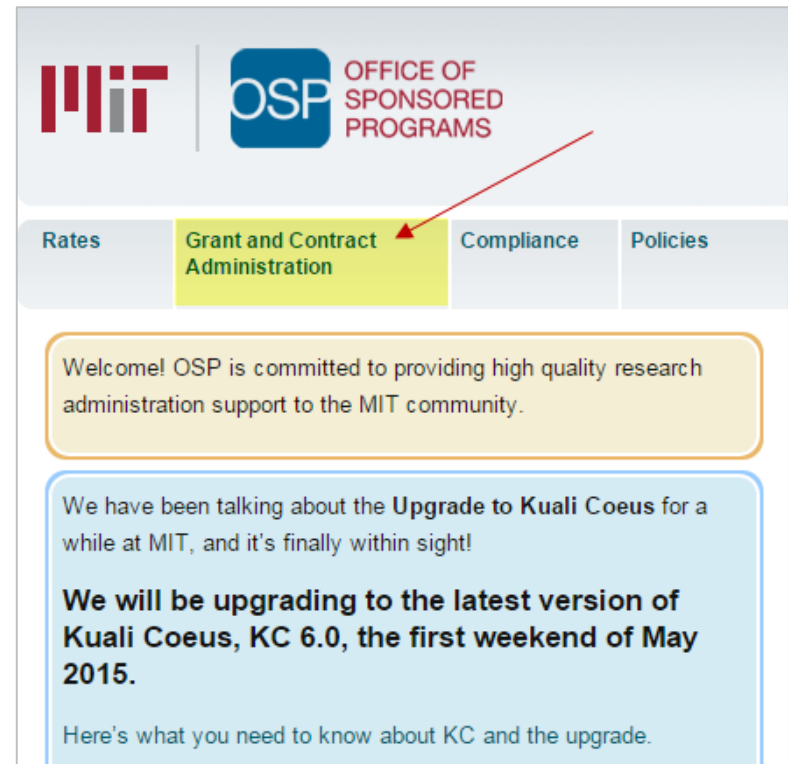


– **Kuali Coeus Website**

– **OSP Website**

[osp.mit.edu](http://osp.mit.edu)

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



## – Join the Research Administration Listserv (ra\_ls)

- 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

