

Coeus Changes: Open Session

Wednesday, September 29, 2021



Schedule of Updates

September - December 2021

September

- Capture 'Major Goals' descriptions for new version of Other Support report (Business Objects)
- Capture UEI number

October

- Implement improvements to CoeusWeb, including new deadline and submission data capture and sharing with PEER
- Combine Investigator and KP tabs in Coeus Premium
- Link budget effort amounts to proposal effort
- Capture new effort details for continuation proposals in Coeus to support compliance

November/December

- Adapt Coeus to implement UEI number and NIH FORMS-G changes

Why Are We Making These Changes?

Long-Term Goal of Increased Functionality Within CoeusWeb

- VUMC's mandate to move away from desktop applications
- Java's (the company) decision to phase out support
- Greater flexibility and compatibility within web applications

Identification of Need for Additional Data Capture

- Audit recommendation to capture and track effort
- Record routing and due date information
- Store 'Major Goals' for Other Support
- Will roll out in both Coeus Premium and CoeusWeb

BIG TAKEAWAY:

We simplified the process of entering effort in Coeus Premium and CoeusWeb to ensure consistency and easier review.

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However, continuation records must include data about existing effort commitments for key persons, including collaborators at other institutions if they are named in the proposal.

BIG TAKEAWAY:

We simplified the process of entering effort in Coeus Premium and CoeusWeb to ensure consistency and easier review.



OSP specialists will compare continuation budgets to existing commitment levels and follow up regarding missing data or inconsistencies that may require sponsor approval.

New Effort Capture Process

Charged

A calculated field. The level of effort included in Period 1 of the Coeus budget

Justification (Override)

In some situations, the numerical level of effort in the budget does not accurately reflect the commitment level described in the budget justification. This column is only used if the justification effort is different than the level of effort in the budget. ex. VA appointments

Committed

Only for use on continuations. Reflects whatever the sponsor believes to be the committed level of effort for the budgeted period. For example, the level of effort described for this period in the original application or at JIT

Actual

A calculated field. The total level of effort shown in Period 1 of the budget--this may include cost-shared effort

Person Months

A calculated field. Reflects the person months commitment based on either the 'Actual' column effort or the 'Justification' column effort, if it is populated



Effort Capture in Coeus

Coeus Premium

Actual

Calculated based on total level of effort shown in the budget--this may include cost-shared effort

Person Months

Calculated based on either the 'Actual' column effort or the 'Justification' column effort, if it exists

Person Name	Budget Charged Effort %	Budget Actual Effort %	Justification Effort %	Person Months	Sponsor-Committed Effort %	Explanation of Variance / Comments
Buble,Michael	0.0	0.0	0.0	0.0	0.0	

Charged

Calculated based on level of effort included in Period 1 of the Coeus budget

Justification

Only used if the justification effort is different than the level of effort in the budget

Committed

Only for use on continuations and reflects what the sponsor believes committed effort is

Effort Capture in Coeus

CoeusWeb

Actual

Calculated based on total level of effort shown in the budget--this may include cost-shared effort

Person Months

Calculated based on either the 'Actual' column effort or the 'Justification' column effort, if it exists

PI

Name	Role	Unit	Budget Effort Charged	Actual	Justification Effort	Person Months	Committed Effort	Comments
Buble, Michael	Principal Investigator	Biostatistics - 104268	0%	0%	0	0	0	

Charged

Calculated based on level of effort included in Period 1 of the Coeus budget

Justification

Only used if the justification effort is different than the level of effort in the budget

Committed

Only for use on continuations and reflects what the sponsor believes committed effort is

Changes to Coeus Premium

We combined the 'Investigator' and 'Key Persons' tabs into a single tab.

This helps capture the new data and makes Premium's Proposal Development more consistent with CoeusWeb and Coeus awards tracking



CHANGES TO COEUS PREMIUM (CONTINUED)

This new consolidated tab has a designated area for the contact PI and another area for all other proposal persons. Each proposal person displays the new effort fields and comment box

Principal Investigator

Person Name	Budget Charged Effort %	Budget Actual Effort %	Justification Effort %	Person Months	Sponsor-Committed Effort %	Explanation of Variance / Comments
Buble,Michael	0.0	0.0	0.0	0.0	0.0	

Principal Investigator Units

Unit Type	Unit Number	Unit Name
Lead Unit	104268	Biostatistics
Approving Unit	007000	Training

Key Persons

OR

Person Name	Project Role	Other Project Role	Budget Charged Effort %	Budget Actual Effort %	Justification Effort %	Person Months	Sponsor-Committed Effort %	Explanation of Variance / Comments	Unit
Orzabal,Roland	Multi-PI		0.0	0.0	0.0	0.0	0.0		007000 : Training
Jones,Norah	Co-Investigator		0.0	0.0	0.0	0.0	0.0		007000 : Training

Changes to CoeusWeb

We upgraded core components of CoeusWeb's proposal development.

This includes General Info, Organizations, Special Review, and the Grants.gov screens. Note: the combined Investigator and KSP tab was already the standard in CoeusWeb

The screenshot displays the CoeusWeb interface for proposal development. The top navigation bar includes 'Coeus Home', 'Proposal Development', 'Inbox', a search bar, and the user profile 'Crouse, Shane C'. A left sidebar contains navigation options: 'View Proposal', 'Edit Proposal', 'General Info', 'Investigator/Key Person', 'Organization', 'Special Review', 'Grants.gov', 'Budget', 'Attachments', 'Questionnaire', 'eCat Forms', and 'Tools' (with sub-options: 'Proposal Roles', 'Print', 'Copy', 'Add New Rolodex Entry').

The main content area shows a form for proposal M0061755. Key fields include:

- Proposal Number:** M0061755
- Sponsor:** National Institutes of Health/Unknown
- Prime Sponsor:** (empty)
- Lead Unit:** 104268 : Biostatistics
- PEER Log:** (empty)
- Proposal Period:** 02/01/2022 - 01/31/2027
- Due Date:** 10/01/2021
- Title:** Shane testing 9.0

A 'Save' button is located below the main form fields.

The form is divided into two main sections:

- General Info:** Contains a 'Title' field with 'Shane testing 9.0', a 'Proposal Type' dropdown set to 'New', and a 'Start Date' field set to '02/01/2022'.
- Submission Info (this data is shared with PEER for OSP Specialist Review):** Contains a 'Deadline to Sponsor' field set to '10/01/2021', a 'Submission Method' dropdown set to 'S2S', an 'Anticipated Submission Date' field set to '10/06/2021', and a 'Date Justification (mail description)' dropdown set to 'PI on Study Section'.

COMBINED INVESTIGATOR/KSP TAB - COEUSWEB

This screen will work very similar to the tab in Premium but with some additional, user-friendly features

PI

	Name	Role	Unit	Budget Effort Charged	Actual	Person Months	Committed Effort	Comments	
 	Buble, Michael	Principal Investigator	Biostatistics - 104268	0%	0% 	0	0		  

CoeusWeb Investigator/KSP (Continued)

Justification Column

Hidden by default; click the pencil icon to display it

Committed Effort Column

Will only appear for continuations if the 'Proposal Type' is set to 'Continuation'

Contact Info and Education/Degree

Details are editable from this screen

Investigator Contact Info Screen

Has additional 'Contact Info' view (see below) to catch missing or incorrect contact info, including Commons IDs, phone numbers, and zip codes



Full Name	First Name	Middle Name	Last Name	Unit	Role	Commons Id	Email	Title	Address 1	Address 2	Address 3	City	State	County	Post
Buble,Michael	Michael		Buble	104268	Principal Investigator	BUBLEM	coeushelp-vumc@vumc.org		3401 West End Avenue	Ste 970		Nashville	Tennessee	Davidson	3721
Orzabal,Roland	Roland		Orzabal	007000	Multi-PI	ORZABAL	coeushelp-vumc@vumc.org		3401 West End Avenue	Ste 970		Nashville	Tennessee	Davidson	3721
Jones,Norah	Norah		Jones	007000	Co-Investigator		coeushelp-vumc@vumc.org		3401 West End Avenue	Ste 970		Nashville	Tennessee	Davidson	3721

CoeusWeb Routing Info

Capturing deadline and submission data allows departments to share more details with their OSP specialist automatically, including their desired submission date (vs. deadline date), requests for OSP submission, and any special notes about their submission

Submission Info (this data is shared with PEER for OSP Specialist Review)

Deadline to Sponsor	Submission Method
10 / 01 / 2021	S2S
Anticipated Submission Date	Date Justification (mail description)
10 / 05 / 2021	PI unavailable on due date
Submit By	Justification
OSP	Need <u>OSP</u> to submit because the PI will be in Clinic

Only
available in
CoeusWeb!

CoeusWeb Organizations

The Organization tab functions much the same way as before. Collaborators or performance sites can be added to the proposal. These organizations still come from the curated Coeus list, and users can still request organizational additions via PEER

The screenshot displays the 'Organization' tab in the CoeusWeb interface. On the left is a dark sidebar with navigation options: View Proposal (highlighted), Edit Proposal, General Info, Investigator/Key Person, Organization (selected), Special Review, Grants.gov, Budget, Attachments, Questionnaire, eCat Forms, Tools, Proposal Roles, Print, Copy, and Add New Rolodex Entry. The main content area shows proposal details for M0061755, including sponsor (National Institutes of Health/Unknown), prime sponsor, proposal period (02/01/2022 - 01/31/2027), due date (10/01/2021), and title (Shane testing 9.0). Below this, there are sections for 'Proposal Organization' (Brown, Donald Clinton at Vanderbilt University Medical Center) and 'Performing Organization' (Vanderbilt University Medical Center). A table at the bottom lists organizations, with one entry for Meharry Medical College. A green 'Add Organization' button is visible above the table.

Type	Name	Address	DUNS	Cong. Dist.
Outgoing Sub Organization	Meharry Medical College	1005 Dr Db Todd Jr Blvd, Nashville, TN 37203-6856 USA	041438185	TN-005

CoeusWeb Special Review

The new CoeusWeb Special Review tab still functions much the same way as before

The screenshot displays the CoeusWeb Special Review interface. On the left is a dark sidebar with navigation options: View Proposal (highlighted in green), Edit Proposal, General Info, Investigator/Key Person, Organization, Special Review (highlighted in grey), Grants.gov, Budget, Attachments, Questionnaire, and eCat Forms. The main content area shows proposal details for M0061755, including Lead Unit (104268 : Biostatistics), Title (Shane testing 9.0), Sponsor (National Institutes of Health/Unknown), Proposal Period (02/01/2022 - 01/31/2027), and Due Date (10/01/2021). Below this is a table of special reviews with columns for Special Review, Approval, Protocol No., Application Date, Approval Date, Exemptions, and Comments. One entry is shown for 'Human Subjects' with a 'Pending' approval status. A green '+ Add Special Review' button is located above the table. Edit and delete icons are visible at the end of the table row.

Special Review	Approval	Protocol No.	Application Date	Approval Date	Exemptions	Comments
Human Subjects	Pending					

CoeusWeb Grants.gov

While the new Grants.gov tab functions much the same way as before, it now has a feature that automatically imports previous record information when submitting a changed/corrected

The screenshot displays the CoeusWeb Grants.gov interface. On the left is a dark sidebar with navigation options: View Proposal (highlighted), Edit Proposal, General Info, Investigator/Key Person, Organization, Special Review, Grants.gov, Budget, Attachments, Questionnaire, eCat Forms, Tools, Proposal Roles, Print, Copy, and Add New Rolodex Entry. The main content area shows proposal details for M0061755, including Lead Unit (104268: Biostatistics), Title (Shane testing 9.0), Sponsor (National Institutes of Health/Unknown), Proposal Period (02/01/2022 - 01/31/2027), and Due Date (10/01/2021). Below this are buttons for Save, Validate Proposal, and Print Application. The Opportunity section includes Funding Opportunity Number (PA-FN-R01), CFDA Number (93.855), Competition Id (FORMS-F), Opening Date (10-09-2019), and Closing Date (10-08-2024). It also shows Submission Type (Application), Revision options (Increase/Decrease Award and Duration), and Agency Routing Identifier. At the bottom, a table lists forms with columns for Form Name, Mandatory, Include, Available, and Print.

Form Name	Mandatory	Include	Available	Print
RR SF 424 V2-0	✓	✓	✓	
Performance Site V2-0	✓	✓	✓	

Coeus Web Proposal Summary

We've upgraded the Coeus Web Proposal Summary screen to include many of the new data collection elements and provided access to Grants.gov forms for individual printing

The screenshot displays the Coeus Web Proposal Summary interface. The top navigation bar includes 'Coeus Home', 'Proposal Development', 'Inbox', and a search bar. The left sidebar contains navigation options like 'Edit Proposal', 'Proposal Summary', 'Budget', 'Attachments', 'Questionnaire', 'eCat Forms', 'Tools', 'Proposal Roles', 'Print', 'Copy', and 'Add New Rolodex Entry'. The main content area is divided into sections: 'In Progress' (with 'Validate Proposal' and 'Print Application' buttons), 'Approval in Progress', and 'Submitted'. The proposal details section shows: Proposal Number M0061755, Sponsor National Institutes of Health/Unknown, Prime Sponsor, Lead Unit 104268 : Biostatistics, PEER Log, Proposal Period 02/01/2022 - 01/31/2027, Due Date 10/01/2021, and Title Shane testing 9.0. The 'General Info' section includes: Proposal Type New, Activity Type Research, Anticipated Award Type Grant - Research, Coeus Award Number, Sponsor Proposal Number, Deadline to Sponsor 10/01/2021, Submission Method S2S, Anticipated Submission Date 10/05/2021, Date Justification PI unavailable on due date, Submitted By OSP, and Osp Submission Justification Need OSP to submit because the PI will be in Clinic. The 'Grants.gov' section is visible but empty. The 'Investigator/Key Persons' section includes a table with columns for Name, Department, Role, Commons ID, Budget Charged Effort, Budget Actual Effort, Justification Effort, and Person Months.

Name	Department	Role	Commons ID	Budget Charged Effort	Budget Actual Effort	Justification Effort	Person Months
Buble, Michael	Biostatistics	Principal Investigator	BUBLEM	0%	0%	0%	0
Orzabal, Roland	Training	Multi-PI	ORZABAL	0%	0%	0%	0
Jones, Norah	Training	Co-Investigator		0%	0%	0%	0

CoeusWeb Proposal Create Tool

- Lead Unit
- Proposal Type
- Activity Type
- Anticipated Award Type
- Title
- Direct/Prime Sponsor
- Start/End Dates

We've added a new proposal create screen with the minimum data elements required to start a proposal and help information to explain the implications of various choices

The screenshot shows a web form for creating a proposal. It contains the following fields and controls:

- Lead Unit***: A dropdown menu with a clear button (x) and a help icon (?).
- Proposal Type***: A dropdown menu with a clear button (x) and a help icon (?).
- Activity Type***: A dropdown menu with a clear button (x) and a help icon (?).
- Anticipated Award Type***: A dropdown menu with a clear button (x) and a help icon (?).
- Title***: A text input field with a help icon (?).
- Direct Sponsor***: A search input field with a search icon (magnifying glass) and a help icon (?).
- Prime Sponsor**: A search input field with a search icon (magnifying glass) and a help icon (?).
- Start Date***: A date input field with a placeholder "mm / dd / yyyy" and a help icon (?).
- End Date***: A date input field with a placeholder "mm / dd / yyyy" and a help icon (?).

At the bottom of the form is a green button with a plus sign and the text "Create Proposal".