# Coeus Changes: Open Session

Wednesday, September 29, 2021

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# 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

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# 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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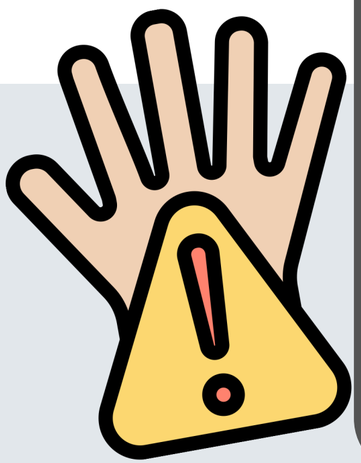


However, continuation records must include data about existing effort commitments for key persons, including collaborators at other institutions if they are named in the proposal.

# 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

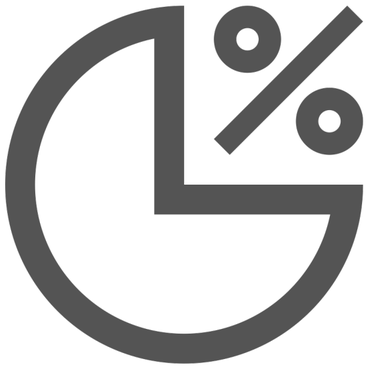
Only for use on continuations. Reflects whatever the sponsor believes to be the committed level of effort for the budgeted period. For example, the level of effort described for this period in the original application or at JIT

### 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



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# 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

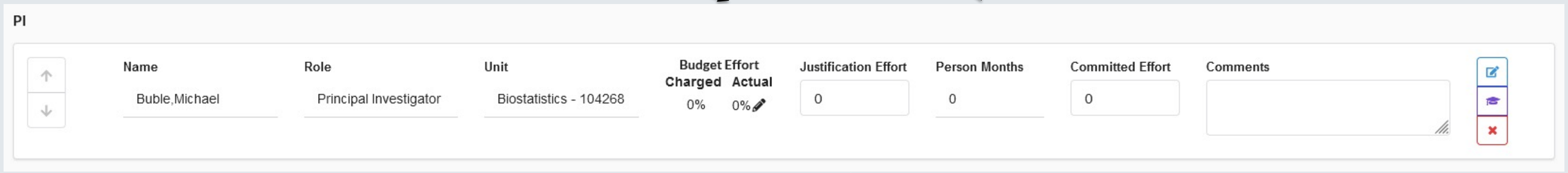
**Committed**
Only for use on continuations and reflects what the sponsor believes committed effort is

# 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

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

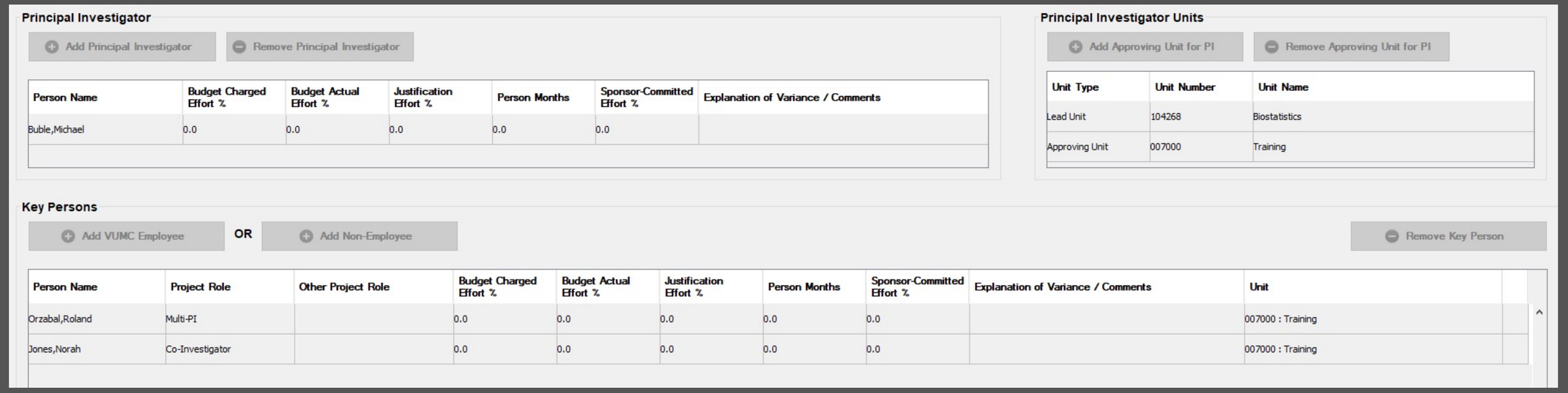
# Changes to Coeus Premium

**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**

Add Principal Investigator | Remove 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**

Add Approving Unit for PI | Remove Approving Unit for PI

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

**Key Persons**

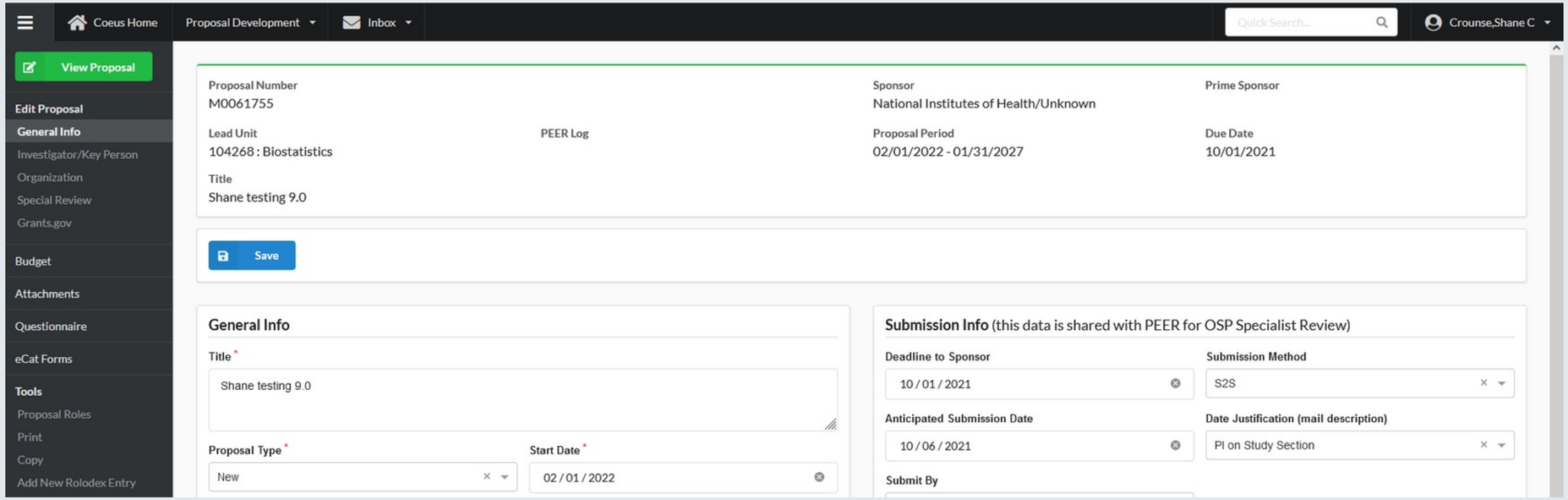
Add VUMC Employee OR Add Non-Employee | Remove Key Person

| 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

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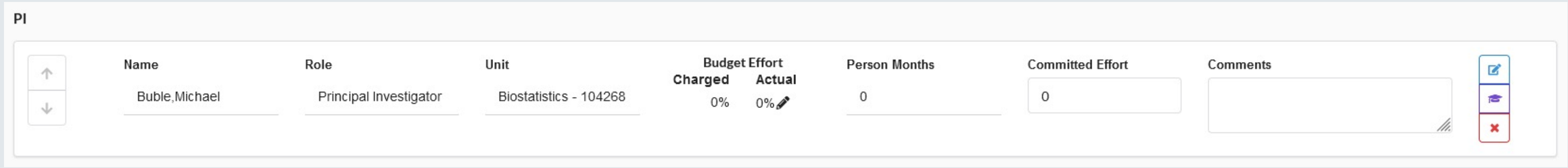
# COMBINED INVESTIGATOR/KSP TAB - COEUSWEB

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



# CoeusWeb Investigator/KSP (Continued)

## Justification Column

Hidden by default; click the pencil icon to display it

## Committed Effort Column

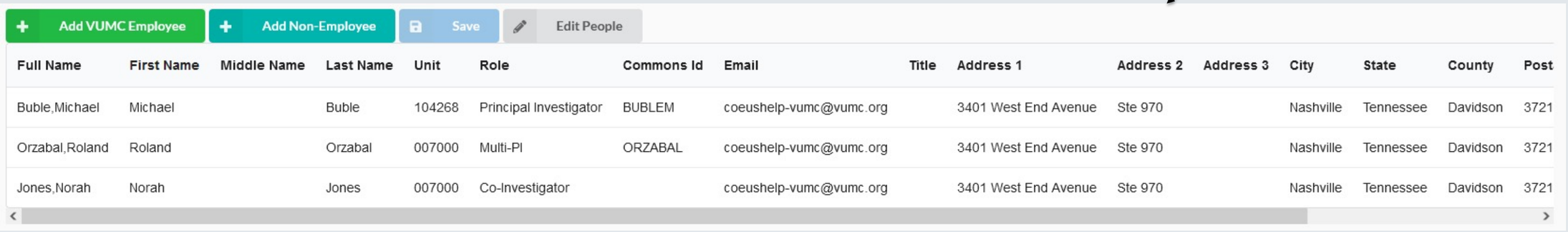
Will only appear for continuations if the 'Proposal Type' is set to 'Continuation'

## Contact Info and Education/Degree

Details are editable from this screen

## Investigator Contact Info Screen

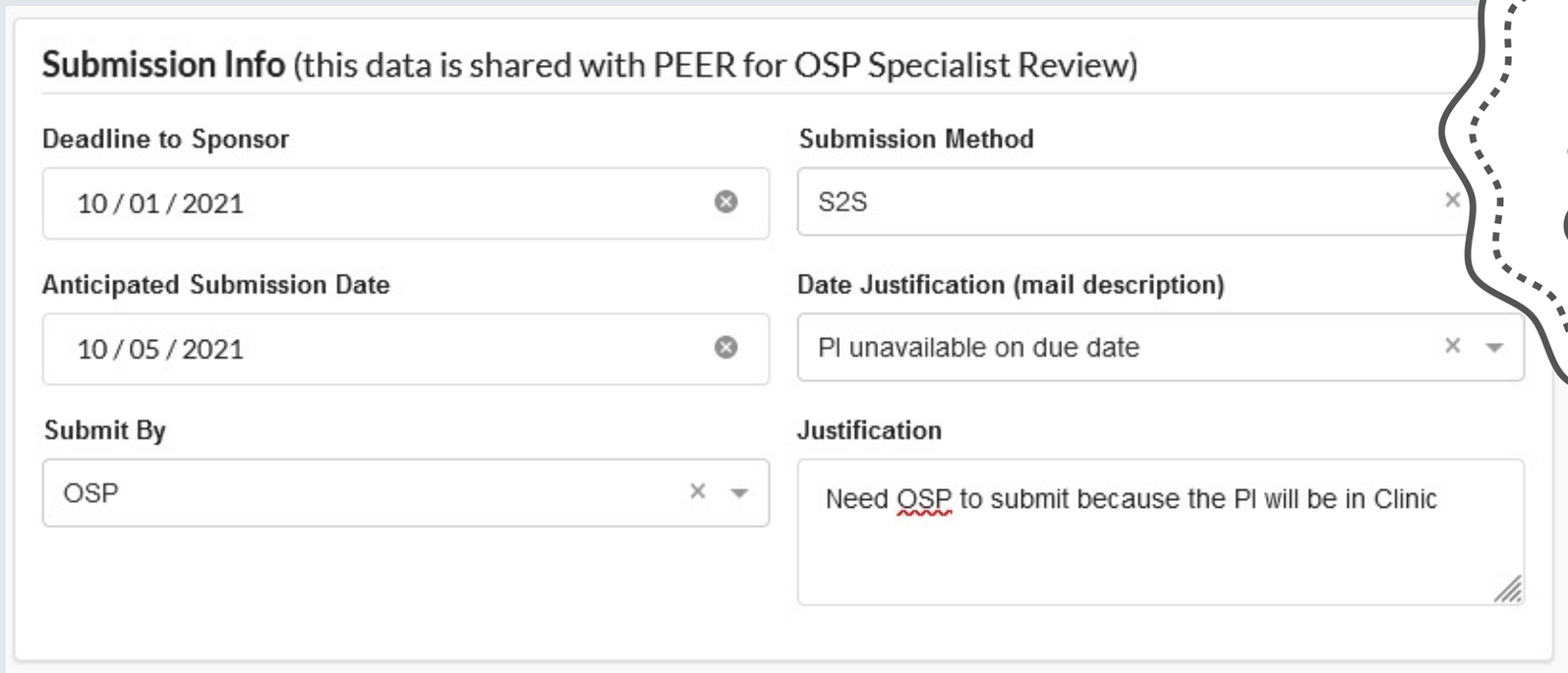
Has additional 'Contact Info' view (see below) to catch missing or incorrect contact info, including Commons IDs, phone numbers, and zip codes




| 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




Only available in CoeusWeb!

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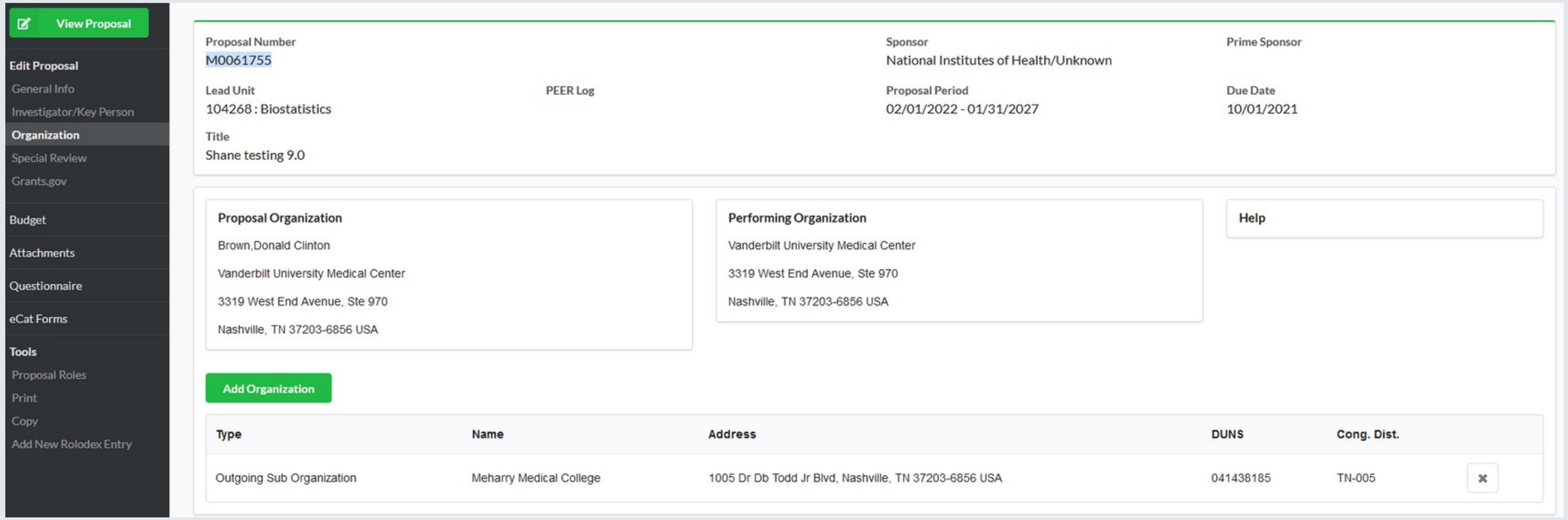
# CoeusWeb Organizations

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

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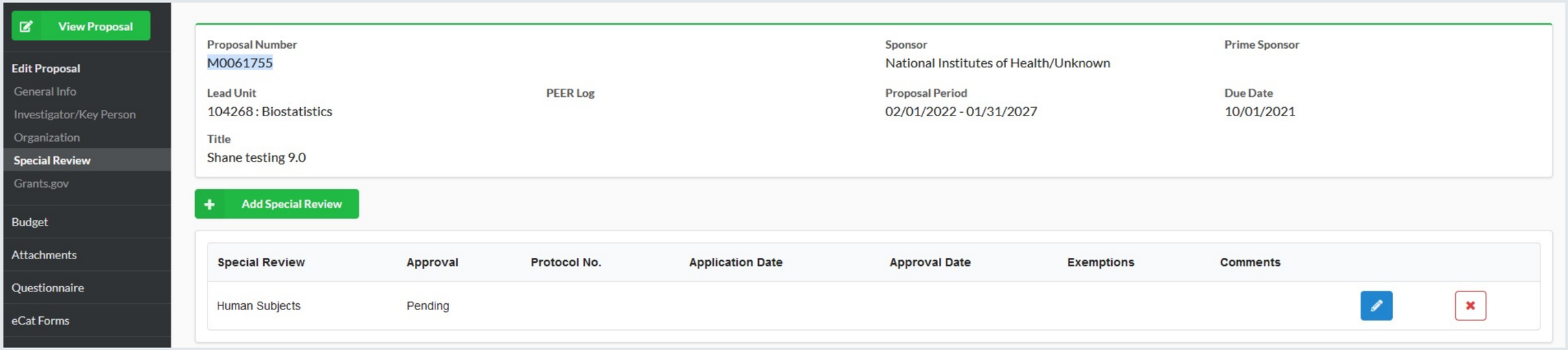
# CoeusWeb Special Review

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

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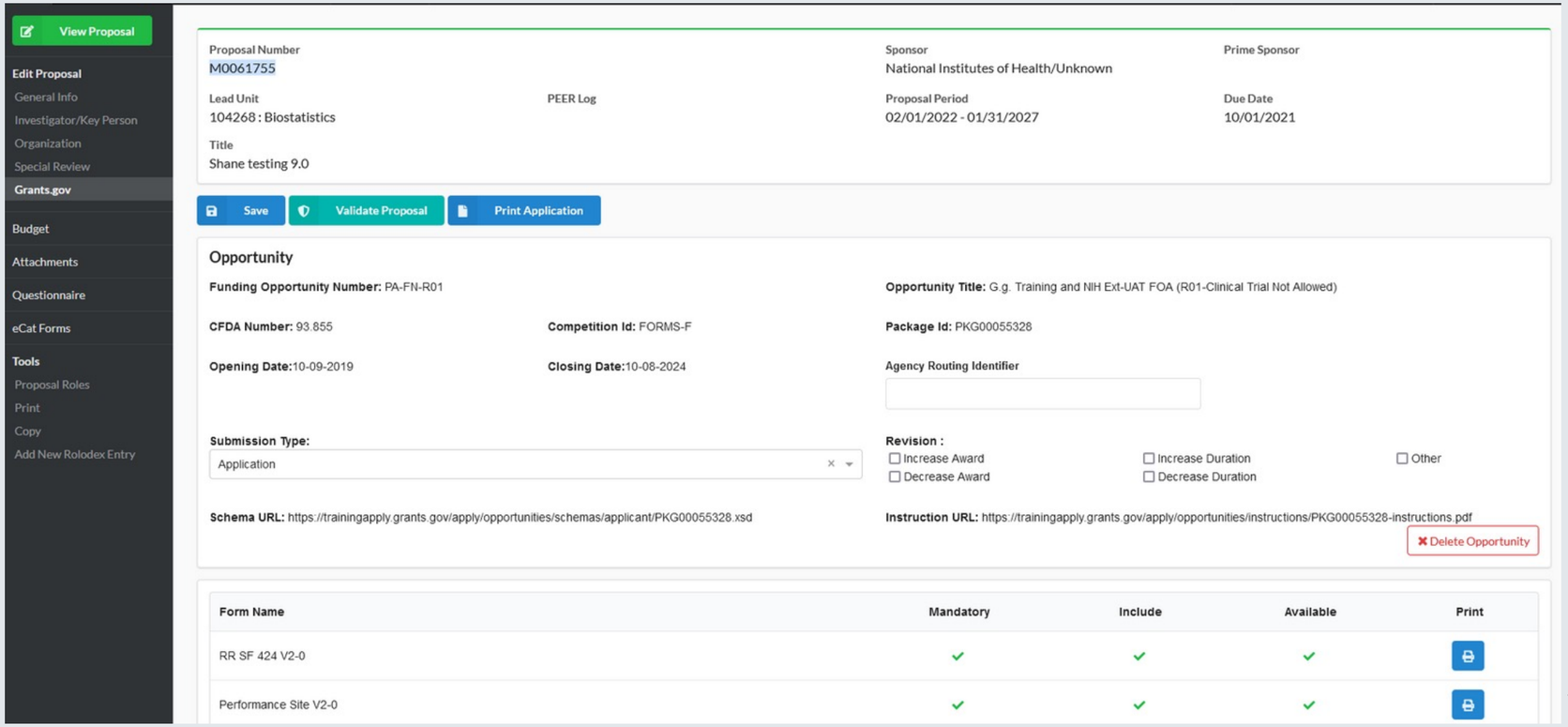
# CoeusWeb Grants.gov

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

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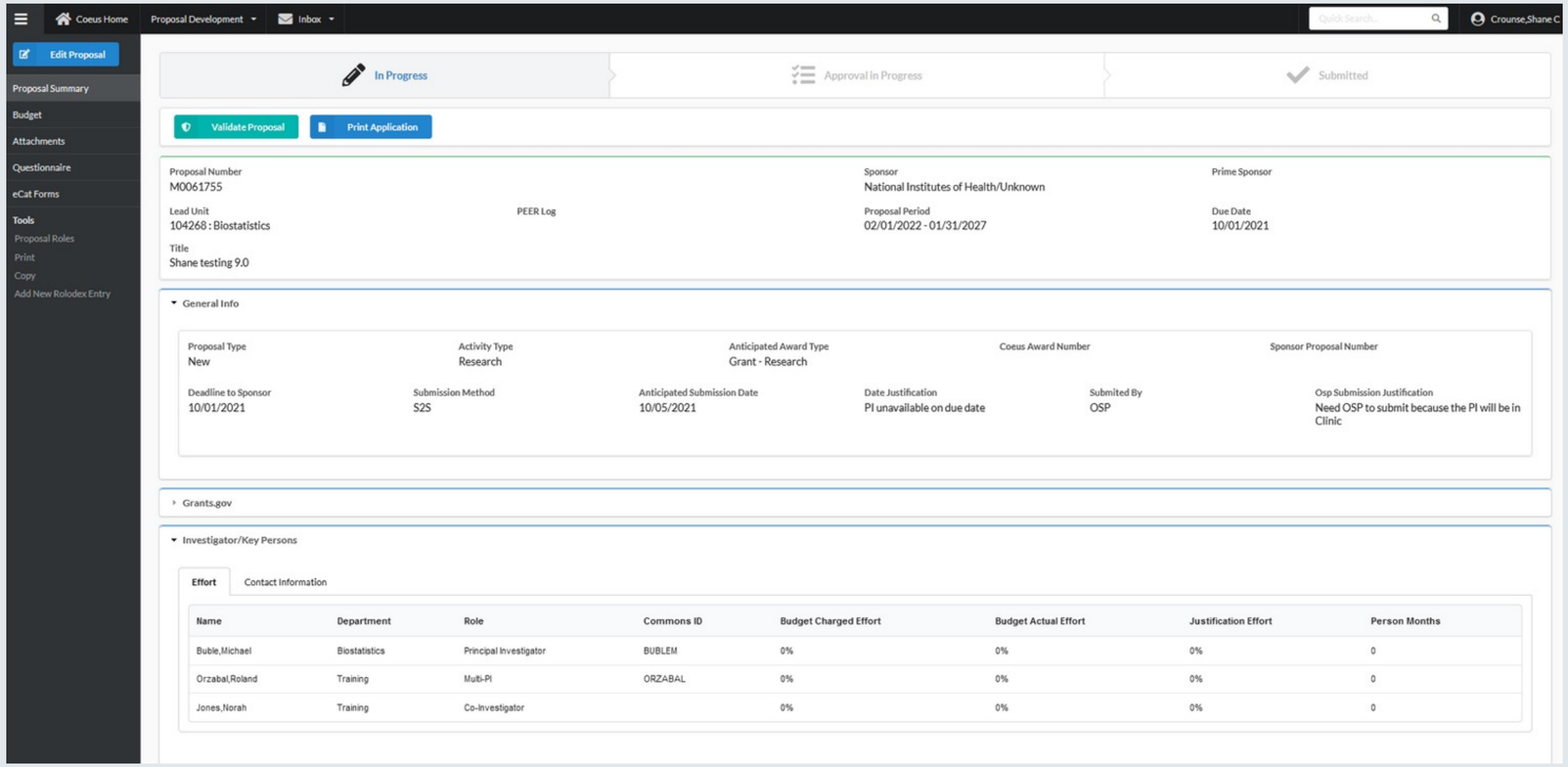
# CoeusWeb Proposal Summary

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

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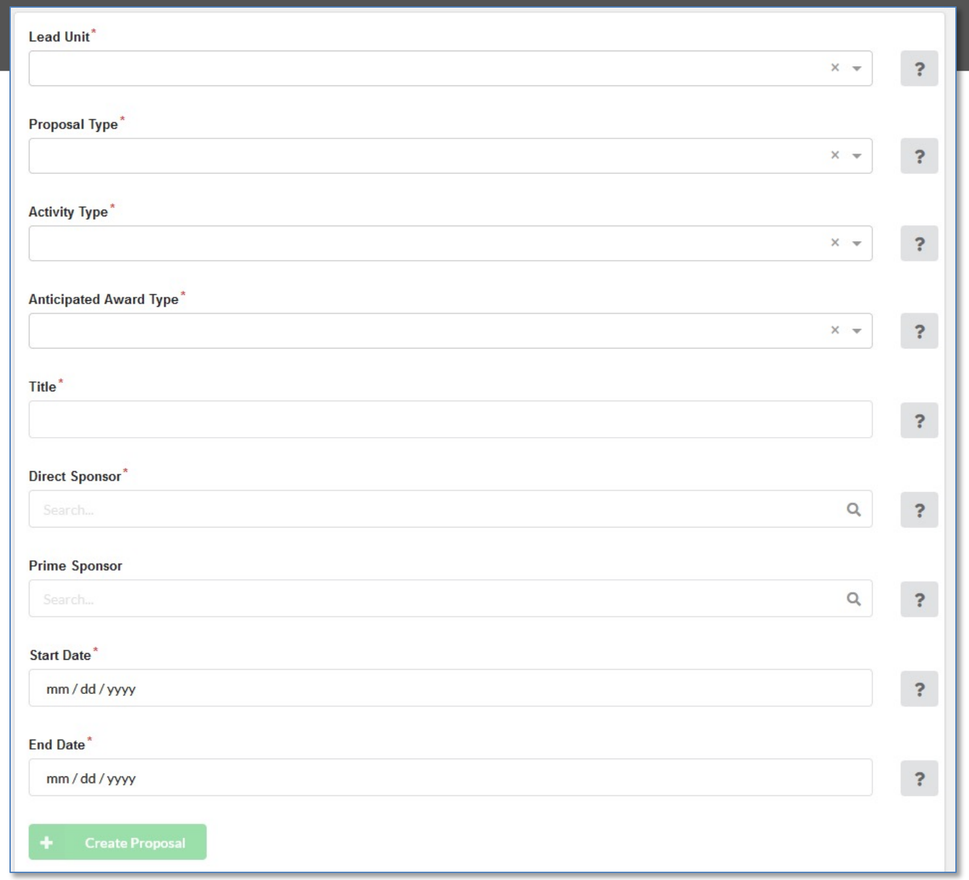
# CoeusWeb Proposal Create Tool

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

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

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