



UNIVERSITY *of* MARYLAND

# **SPA/SPAC Updates** **2<sup>nd</sup> Quarter 2014**

May 22, 2014

2:30 – 4:00 pm

HSF-II Auditorium



# Today's Agenda

- SPAC Personnel Changes
- Staff moves in SPA
- Coeus Reminders
- NIH Reminders and Announcements
- Kualo Coeus Implementation

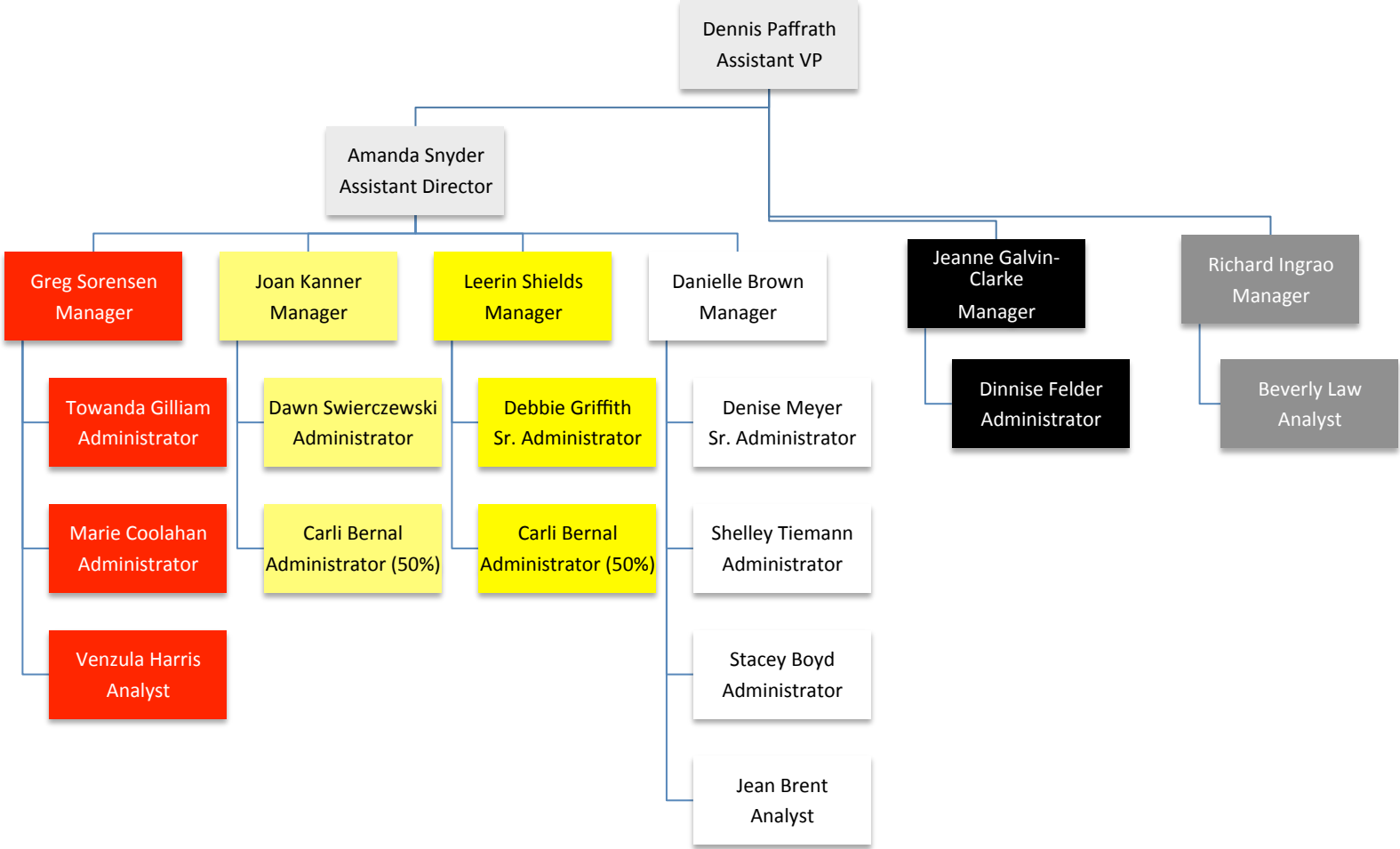
# SPAC Personnel Changes

- Team Staff Yellow
  - Carolina Castro has moved out of SPAC
- Coverage until replacement/**Red Team**
  - Med General Internal Medicine 10408080
  - Med Nephrology 10408130
  - Med Rheumatology 10408150
  - Diagnostic Radiology 10403000

# SPAC Personnel Changes

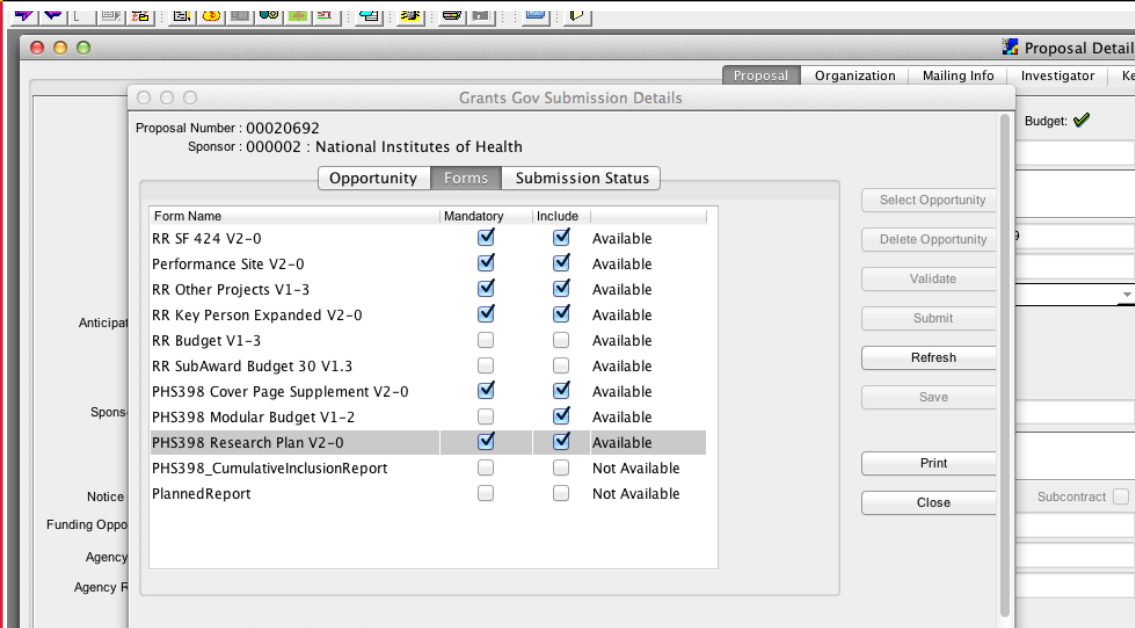
- Coverage until replacement/ **White Team**
  - Med Chairman Office Davis 10408011
  - Med Cardiology 10408050
  - Med Infectious Disease 10408120
  - Med Pulmonary 10408140
  - Family Medicine 10406000

# SPA Organizational Chart (05/12/14)



# Coeus Reminders – Viewing and Printing Grants.gov Forms

- Go to Action → Grants.gov
- Select the “Forms” tab
- Highlight the form(s) you wish to print
- Click Print
- Coeus generates a pdf of your forms, including attachments
- Note: Attachments could be out of order in the generated pdf, but will transmit to the sponsor in the right order



Action → Grants.gov

Select the “Forms” tab

Highlight the form(s) you wish to print

Click Print

Coeus generates a pdf of your forms, including attachments

First page is Grants.gov Form

Any pdf attachments follow Form page

### PHS 398 Research Plan

Please attach applicable sections of the research plan, below.

OMB Number: 0925-0001

1. Introduction to Application <small>(for RESUBMISSION or REVISION only)</small>	<input type="text"/>
2. Specific Aims	M-6_PHS_ResearchPlan_SpecificAims.pdf
3. *Research Strategy	M-7_PHS_ResearchPlan_ResearchStrategy.pdf
4. Progress Report Publication List	<input type="text"/>
<b>Human Subjects Sections</b>	
5. Protection of Human Subjects	<input type="text"/>
6. Inclusion of Women and Minorities	<input type="text"/>
7. Inclusion of Children	<input type="text"/>
<b>Other Research Plan Sections</b>	
8. Vertebrate Animals	M-8_PHS_ResearchPlan_VertebrateAnimals.pdf
9. Select Agent Research	M-11_PHS_ResearchPlan_SelectAgentResearch.pdf
10. Multiple PD/PI Leadership Plan	<input type="text"/>
11. Consortium/Contractual Arrangements	<input type="text"/>

# Signing and Administrative Officials on NIH RPPR

- ***Please*** make sure that your PIs choose someone from your **SPA** team as the Administrative and Signing Officials in their RPPRs
- When left blank, RPPR defaults to first person on the list of officials who happens to be in SPAC, not in SPA.
- We are concerned that an RPPR notification could get lost or delayed because the appropriate official is not selected to receive the notification email.



# Coeus to Quali Coeus Transition

- **Kuali Coeus:** Web-based enhancement of Coeus
- Part of Kuali's suite of open source enterprise software developed for universities, by universities
- **Go Live:** July 1, 2014
- **PLANNED DOWNTIME** – both Coeus and Kuali Coeus will be unavailable June 23-30

# Transition of Proposals and Other Data

- Recommended: Prepare proposals in Coeus and leave “in progress”
  - Route for approvals and submit via Kualo Coeus
- Coeus data will be available in Kualo Coeus
  - We will migrate proposals, institute proposals, negotiations, awards, and subwards from Coeus into Kualo Coeus

# User Data Clean Up

- Please review your department users:
  - From the Main Menu, select Admin > Unit Hierarchy
  - Locate and select the folder for your department
  - From the menu, select Action > User Maintenance
  - Click on the “username” column header to sort alphabetically
- Let Janet Simons know if there are people who should no longer be listed for your department:
  - Email [jsimons@umaryland.edu](mailto:jsimons@umaryland.edu)
  - Include the Department Code and the full names of the people to be inactivated from your department

# Kuali Coeus - Training

- Delta Training sessions for current Coeus users:
  - ◆ **Tuesday, 6/10, 1:00 – 3:00 pm, SOD Room G205**
  - ◆ **Thursday, 6/19, 1:00 – 3:00 pm, SOP Room N-111**
  - ◆ **Monday, 6/23, 10:00 – noon, HSF II Room 600**
  - ◆ **Wednesday, 6/25, 10:00 – noon, SOL Room 108**
- Sessions will cover:
  - Exciting new features in Kuali Coeus
  - Key differences between Coeus and Kuali Coeus

# Kuali Coeus Training (Continued)

- Approver tutorials available in June
- Training for viewers will be available in June (Institute Proposal, Award, Subcontract Modules)
- Tutorials, checklists, etc. will available on the SPA Kuali Coeus Website
- We hope to have a Kuali Coeus “sandbox” for the campus to explore
- New user training will be available after Go Live

# What doesn't change with the move from Coeus to Kuali Coeus?

- Overall business processes are the same
  - Still route the same types of actions
- The functionality is the same as in Coeus
  - For example, we are still submitting System to System federal proposals
- The data collected in Kuali Coeus is the same data you are already entering into Coeus
  - Many fields even have the same names

# Proposal Development

**kuali** COEUS® Researcher Unit Central Admin Maintenance System Admin Provide Feedback Release 5.2 (Oracle9i)

action list doc search Logged in User: 35710011 Login Logout

**Proposal Development Document** ?

<b>Doc Nbr:</b>	35789	<b>Status:</b>	In Progress
<b>Initiator:</b>	35710011	<b>Created:</b>	09:48 AM 05/16/2014
<b>Sponsor Name:</b>	National Institutes of Health	<b>PI:</b>	

Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions  
Budget Versions Permissions Proposal Summary Proposal Actions Medusa

Document was successfully saved.

*In app help* expand all collapse all \* required field ?

Required Fields for Saving Document hide

Required Fields for Saving Document	
<b>Proposal Number:</b>	207
<b>* Proposal Type:</b>	New
<b>* Lead Unit:</b>	10101000 - SOM Office of the Dean
<b>* Activity Type:</b>	Research
<b>* Project Title:</b>	Test - Test - Test
<b>* Sponsor Code:</b>	000002 National Institutes of Health
<b>* Project Start Date:</b>	12/01/2014
<b>* Project End Date:</b>	11/30/2017

**\* Project Title**

<b>Institutional Fields Conditionally Required</b>
<b>Award ID:</b>
<b>Original Institutional Proposal ID:</b>

**Sponsor & Program Information** show  
**Organization/Location** show  
**Delivery Info** show

# Budget

action list doc search

Logged in User: 23880040

Login Logout

**Budget Document** ?

Doc Nbr:	35602	Status:	SAVED
Initiator:	10940013	Created:	10:36 AM 04/21/2014
Budget Name:	Budget1	Version #:	1

Budget Versions Parameters Rates Summary Personnel Non-Personnel Distribution & Income Modular Budget Budget Actions

[< return to proposal](#)

\* required field ?

Budget Overview hide

**Budget Overview** ?

Project Start Date:	12/01/2014	Modular Budget?	<input checked="" type="checkbox"/>
Project End Date:	11/30/2019	Residual Funds:	<input type="text"/>
Total Direct Cost Limit:	<input type="text" value="0.00"/>	Total Cost Limit:	<input type="text" value="0.00"/>
Budget Status:	Incomplete	Unrecovered F & A Rate Type:	MTDC
Final?	<input type="checkbox"/>	F&A Rate Type:	MTDC
On/Off Campus:	All On	Submit Cost Sharing?	<input checked="" type="checkbox"/>
Comments:	<input type="text"/>		

Budget Periods & Totals hide

**Budget Periods** ?

	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
Add:	<input type="text"/>	<input type="text"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="add"/>



# New (cool) features

- In application Help icon
- All info on the screen, not in separate menus (like Action → Grants.gov)
- Proposal Summary
  - Easy way for approvers to review the proposal
  - High-level review that allows user to drill down for additional details, as desired
- Validations
  - Data validation feature in proposal and budget
  - Shows errors and warnings AND provides a button that takes you right to the tab in the proposal that needs to be corrected

# Proposal Summary

Document was successfully saved.

[expand all](#) [collapse all](#)

\* required field

**Proposal Summary** ▼ hide

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**Proposal Information**

<b>Title</b>	Test - Test - Test	<b>Proposal Number:</b>	207
<b>Principal Investigator</b>	Harry Potter	<b>Project Start Date</b>	12/01/2014
<b>Lead Unit</b>	10101000 - SOM Office of the Dean	<b>Project End Date</b>	11/30/2017
<b>Activity Type</b>	Research	<b>Include Subaward(s)?:</b>	No
		<b>Sponsor:</b>	National Institutes of Health
		<b>Sponsor Deadline Date:</b>	07/07/2014
		<b>Sponsor Deadline Type:</b>	Receipt

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**Budget Totals**

Total Direct Cost:	Total F&A Costs	Total Cost:	Cost Share	Underrecovery	Program Income	F&A Rate Type
\$ 148,167.10	\$ 68,034.38	\$ 216,201.48	\$ 0.00	\$ 0.00	\$ 0.00	MTDC

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**Budget Summary** ▼ hide

▼ hide **Budget Periods**

Period	Start Date	End Date	Direct Cost	Indirect Cost	Underrecovery	Cost Sharing	Total Cost
1	12/01/2014	11/30/2015	\$48,142.42	\$22,011.19	\$0.00	\$0.00	\$70,153.61
2	12/01/2015	11/30/2016	\$49,376.69	\$22,671.52	\$0.00	\$0.00	\$72,048.21
3	12/01/2016	11/30/2017	\$50,647.99	\$23,351.67	\$0.00	\$0.00	\$73,999.66

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▼ hide **F & A**

Rate Type	On Campus	Fiscal Year	Start Date	Institute Rate	Applicable Rate
MTDC	No	2009	07/01/2008	26.00	26.00
MTDC	Yes	2012	07/01/2011	53.50	53.50

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▶ show **Budget Reports**

**Key Personnel (1)** ▶ show

**Custom Data Information** ▶ show

**Questions** ▶ show

**Validations** ▶ show

**Print** ▶ show

# Validation

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**Data Validation** ▼ hide

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**Data Validation** ?

You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov

[turn off validation](#)

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**Validation Errors**

▼ hide	<b>Key Personnel Information (1)</b>	
	The Investigators are not all certified. Please certify Harry Potter.	<a href="#">fix</a>
▼ hide	<b>UMB Required Questionnaire (1)</b>	
	You must complete the questionnaire "UMB Required Questionnaire"	<a href="#">fix</a>

**Warnings**

# Questions?



# Final Notes

- Both presentations will be available on SPA and SPAC websites
- Quarterly Meetings for 2014:
  - August 28<sup>th</sup>, 2:30 – 4:00, Location TBD
  - November 20<sup>th</sup>, 2:30 – 4:00, Location TBD
- Thanks for joining us today!