SPA/SPAC Updates
2nd 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

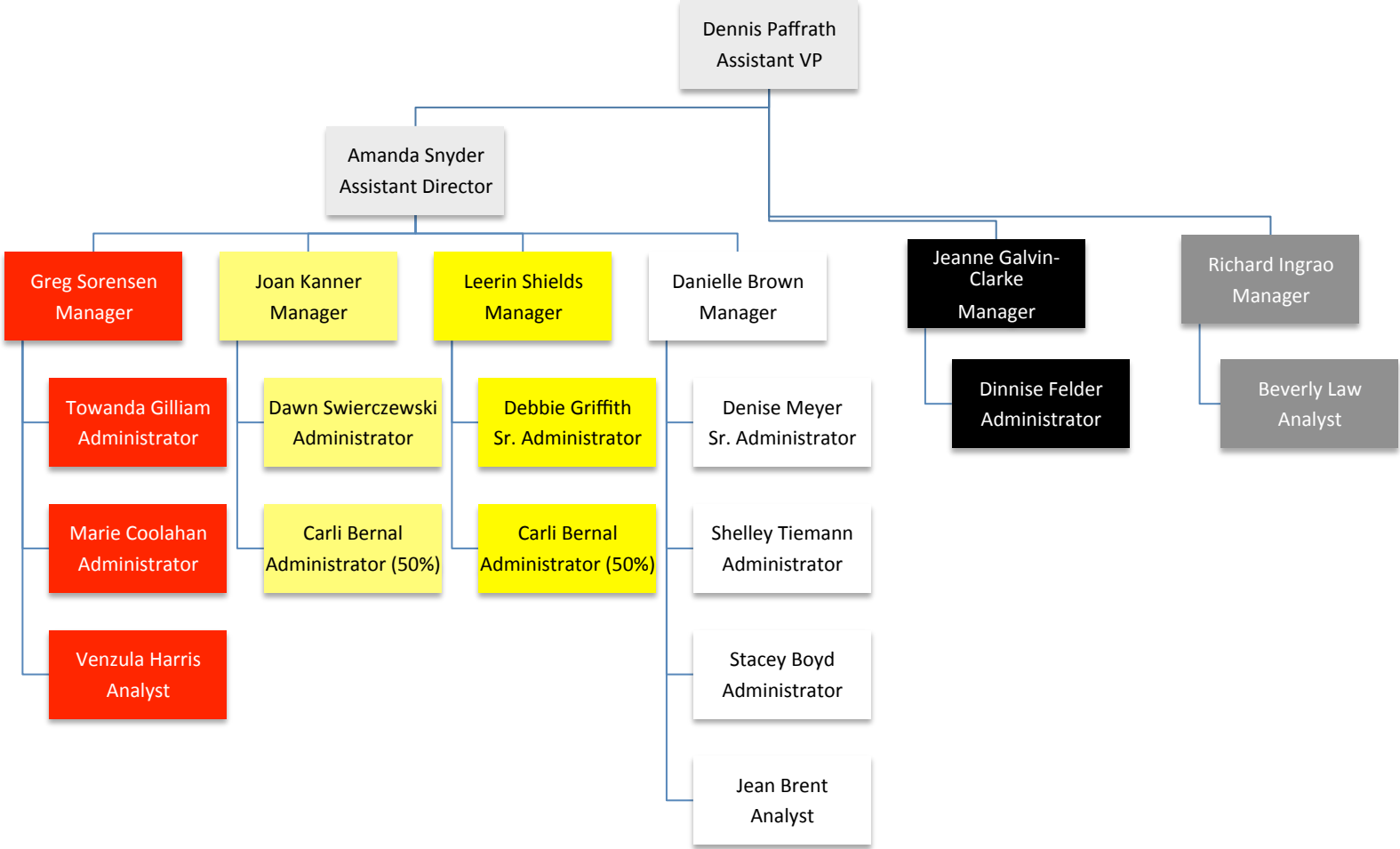- NIH Reminders and Announcements

- Kuali 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
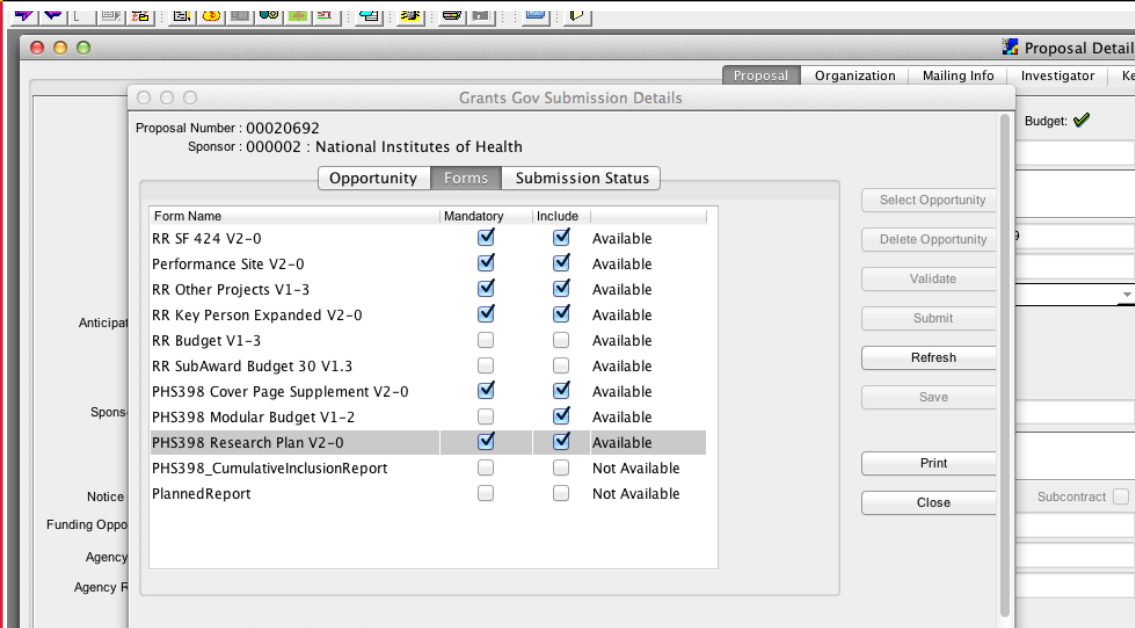
SPAC Personnel Changes

- 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)

- **Dennis Paffrath** — Assistant VP
  - **Amanda Snyder** — Assistant Director
    - **Greg Sorensen** — Manager
      - Towanda Gilliam — Administrator
      - Marie Coolahan — Administrator
      - Venzula Harris — Analyst
    - **Joan Kanner** — Manager
      - Dawn Swierczewski — Administrator
      - Carli Bernal — Administrator (50%)
    - **Leerin Shields** — Manager
      - Debbie Griffith — Sr. Administrator
      - Carli Bernal — Administrator (50%)
    - **Danielle Brown** — Manager
      - Denise Meyer — Sr. Administrator
      - Shelley Tiemann — Administrator
      - Stacey Boyd — Administrator
      - Jean Brent — Analyst
  - **Jeanne Galvin-Clarke** — Manager
    - Dinnise Felder — Administrator
  - **Richard Ingrao** — Manager
    - Beverly Law — Analyst

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

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 Kuali 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 Kuali Coeus

- Coeus data will be available in Kuali Coeus
  - We will migrate proposals, institute proposals, negotiations, awards, and subwards from Coeus into Kuali 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
  - 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

Budget

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.

* required field

Proposal Summary   ▾ hide

Proposal Information

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

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

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

▾ 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

▶ show Budget Reports

Key Personnel (1)	▶ show
Custom Data Information	▶ show
Questions	▶ show
Validations	▶ show
Print	▶ show

Validation

Questions?

Final Notes

- Both presentations will be available on SPA and SPAC websites

- Quarterly Meetings for 2014:
  - August 28th, 2:30 – 4:00, Location TBD
  - November 20th, 2:30 – 4:00, Location TBD

- Thanks for joining us today!