Coeus Electronic Document Storage

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Agenda

- Overview
- CoeusLite My Awards
- PI/Co-I Access to My Awards: Project Documents
- Roles Database Integration for My Awards Roles
- New Coeus User Roles for Electronic Documents
- Document Types & Naming Conventions
- Resources
Why Electronic Document Storage?

- A Digital MIT initiative to reduce paper, improve access and streamline workflow
- EDS enables 24/7 access to Institute Proposal and Award documents for all research stakeholders
- Aug 2012 – all Development Proposals created and stored in Coeus
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April 2013 – OSP started attaching documents to Institute Proposals

January 14, 2014 – OSP started attaching documents to Award accounts

- All active NSF, NIH, ONR and DOE awards
  - Awards and Mods – Retroactive
  - Other associated documents – Going forward only

- All other sponsors – Going forward only
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Institute Proposal Attachments

- Only documents not available in the Dev Proposal are uploaded as IP Documents
  - Examples: JIT submissions, Reps & Certs

Award Attachments

- In general, all documents related to the award are attached at parent level
  - Examples: Agreements, mods, extension requests, sponsor approvals

- Exceptions (attached to child accounts) include:
  - Task Orders/RPPs under master agreement
  - Fabricated Equipment approvals
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Moving toward paperless!
- Storage of paper files discontinued going forward
- Awards received before 1/14/14 will have some documents in paper file, some electronic

Future process changes:
- Electronic document storage will enable streamlined process for communicating new awards/mods and account set ups/changes by OSP to DLCs/PIs
CoeusLite: My Awards

Provides authorized users one-stop access to documents linked to an award across modules (Development Proposal, Institute Proposal, Award)

PI/Co-I does not require a Coeus role – access requires up-to-date Certificates

DLC may limit authorizations to view documents for a specific module, or across all modules
PI My Awards: Project Documents

Award Summary

- PI select an award from the **My Award List** of parent level awards (-001) on which he or she is a PI or Co-I

- **Award Summary** includes Account, Award Type, Account Type, Effective Date and Personnel, Schedule and Special Reviews, Money and End Dates

- PI at parent level (lead/contact) has **Project Documents** link in left Navigation
PI My Awards: Project Documents

- PI at parent level (lead/contact) has access to files for the entire project structure in one view, including all child awards that have associated documents.
Co-I My Awards: Project Documents

Award Summary
- Co-I at parent level has no **Project Documents** link in left Navigation
- PI of child awards must use **Award Search** to access Project Documents

Project Documents
- PI of child award accesses Project Documents associated only with that award
My Award Roles Integrated with Roles Database

- CoeusLite My Award authorizations will be maintained by DLC Financial Primary Authorizers via the Roles Database.
- Document Roles enable viewing of attachments in Coeus Premium Award and Institute Proposal modules and via the new CoeusLite My Awards Project Documents interface.
My Awards Roles maintained in Roles Database

New Roles for Project Documents DLC Authorization

- View Shared Award Documents
- View Shared Institute Proposal Documents
- View Dev Proposal Attachments
- View All Shared Documents

Existing Coeus Roles moving to Roles DB

- View Departments Awards
- View Key Person Maintenance
- Maintain Key Person
My Award Roles Integrated with Roles Database

- Authorizations granted at Unit/Profit Center level (e.g. PC391000 – OSP)
  - NOTE: Cost Object level role assignment is NOT compatible with Coeus

- “View Departments Awards” populates users’ My Awards lists with all -001 level active awards for the Profit Centers in which the roles is assigned
  - Without it, My Awards will not display list of -001 awards; users must use Award Search for access
  - Should be assigned along with Project Document and Key Person Maintenance roles
Coeus Authorizations – where to assign them?

<table>
<thead>
<tr>
<th>Roles Database – DLC Maintained Roles</th>
<th>Coeus Maintained Roles (via Webform request)</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Departments Awards</td>
<td>View Award &amp; View Institute Proposal</td>
</tr>
<tr>
<td>View Key Person Maintenance</td>
<td>Proposal Creator*</td>
</tr>
<tr>
<td>Maintain Key Person</td>
<td>View/Maintain All Dev Proposals*</td>
</tr>
<tr>
<td>View Shared Award Documents</td>
<td>View/Maintain Award Budget for RAFT**</td>
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<tr>
<td>View Shared Institute Proposal Documents</td>
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<tr>
<td>View Dev Proposal Attachments</td>
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<tr>
<td>View All Shared Documents</td>
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</tbody>
</table>

* Requires request come from DLC AO/FO
** Requires Award Budget training completion
1. View Shared Award Documents (New Role)

**Will allow user to access**

- all shared Award Documents at the -001 parent plus all shared Award Documents at child award levels when accessing via the -001 level award
- only Shared Award Documents on a given child account when accessing via child award record (Award Search)
- only Shared Award documents if no additional View Documents role is given for other modules (e.g. no Institute Proposal documents will display)
2. View Shared Institute Proposal Documents (New Role)

Will allow user to access

- For -001 parent award - all Shared Institute Proposal attachments on IPs funded to the -001 parent or any of its child awards
- For child award - only Shared Institute Proposal attachments on IPs that are funded to that child account/award
3. View Dev Proposal Attachments (New Role)

**Will allow user to access**

- All Proposal Dev Attachments on Dev Proposals linked to Institute Proposals funded to the -001 award parent, AND
- All Proposal Dev Attachments on Dev Proposals linked to the Institute proposals funded to child awards in the structure
- For child award records: all Proposal Dev Attachments on Dev Proposals linked to IP's funded to that child award

Note: this role does not give access in Coeus Lite or Premium to the Proposal Development Module
4. View All Shared Documents (New Role)

This role combines the rights of all three View Shared Documents roles, and can be used by DLC Primary Authorizers to grant all three roles to a user without having to individually select each one

- View Shared Award Documents
- View Shared Institute Proposal Documents
- View Dev Proposal Attachments
“Award Attachment Types” & “Institute Proposal Attachment Types” tables provide guidance on which sort of project documents are uploaded where and what info the naming conventions convey.
Welcome to CoeusLite

Primary Features of CoeusLite include:

- My Proposals: Allows Principal Investigators and departmental administrators to prepare and submit grant applications for institutional approval and allows for systematic review and transmission of applications to federal agencies through Grants.gov.
- My Awards: Allows Principal Investigators and departmental administrators to review summary-level award information including investigator, award amount, special monitors, etc. Also includes access for Principal Investigators and departmental administrators to maintain and confirm award key persons through key Person Maintenance.
- My COI: Allows Principal Investigators and Key Personnel to submit proposal-specific and annual financial conflict of interest disclosures as required by federal regulations and some non-federal contracts.
- My ARRA: Allows Principal Investigators to review data gathered from Coeus and SIF and complete their reports to meet the Federal reporting requirements of Section 1512 of the Recovery Act.

To create, maintain, and support the most robust electronic solution to manage all components of sponsored projects from proposal development through award closeout while fostering best practices by joining innovative technology with the knowledge base of a national consortium of research stakeholders.
Resources

❖ Coeus Electronic Document Storage webpage – OSP Website: Contract and Grants Administration: Award Set Up: Coeus Electronic Document Storage (EDS)
  ❖ Basic info and links to Quick Cards, Document Types and Naming Conventions guidance, etc.

❖ Quick Reference Cards, etc. on Coeus Help & Training Website
  ❖ Separate Quick Cards for DLC admin users, PI’s & Co-I’s, DLC Primary Authorizers, Premium Users
  ❖ http://osp.mit.edu/coeus/user-guides/quick-reference-cards

❖ For Help – email Coeus-help@mit.edu
UPCOMING OSP FORUM

UNIFORM GUIDANCE: What We Know So Far

August 14, 2014