KC Update
February 2016
Agenda

Welcome and Introductions

Kuali Coeus Post Go-Live May 2015

KC Updates – February 2016
  • KualiCo Partnership and Project Goals
  • Release Notes and Resources
  • Updated features

Questions and Answers
Welcome and Introductions

Carol Wood, Assistant Director, OSP
Carole Trainor, Senior Training Specialist, OSP
Ian Cariolo, Senior Coeus Support Specialist, OSP
Kara DeNutte, Senior Coeus Support Specialist, OSP
Amy Holden, Data Analyst, OSP
Kimberly Mann, Senior Coeus Support Specialist, OSP
KC Known Issues

Posted on kc.mit.edu

• Updated regularly
• Workaround provided where possible

Proposal Submission Survey (July – September 15)

• Gathered feedback from 96 users on their experience with KC proposal development, submission, and support
• Pain points factored into prioritization of fixes for new release
As you prepared your proposal, how easy were the following sections to complete?
Based on the survey results and feedback/pain points overall, the primary focus of the updates was Proposal Development.

However, system improvements were also incorporated in other areas.
KC Update Post Go-Live

Kuali Coeus since Go-Live (May 2015 through January 2016)

- **Development Proposals**
  - More than 2,500 created (2,452 routed to OSP for review)
  - 324 have been submitted to Grants.gov System-to-System (S2S)

- **Awards**
  - 787 new awards have been setup
  - 17,817 award/mod related transactions
KC Support – MIT OSP

• Drop-in sessions
  – One-on-one assistance for specific proposal questions
  – Email kc-help@mit.edu to arrange date/time

• KC Lunchtime Learn sessions
  – Offered monthly since September 2015
  – Presentations posted online

• KC Helpdesk Support
  – More than 4,200 KC Help Tickets since May 2015
Lunchtime Learn Sessions!

March 22\(^{nd}\)
Aero/Astro Conference Room
33-206

March 24\(^{th}\)
OSP Kendall Square Conference Room
NE18-901

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</tr>
</thead>
<tbody>
<tr>
<td>2014/15</td>
<td>413</td>
<td>451</td>
<td>307</td>
<td>233</td>
<td>319</td>
<td>290</td>
<td>253</td>
<td>219</td>
<td>211</td>
</tr>
<tr>
<td>2015/16</td>
<td>960</td>
<td>905</td>
<td>600</td>
<td>344</td>
<td>401</td>
<td>371</td>
<td>377</td>
<td>275</td>
<td>270</td>
</tr>
</tbody>
</table>
KC Training

- **Overview demonstrations**
  - KC Overview, All About Awards, All About Proposals: 19 sessions
  - Videos available online

- **Proposal Development and Advanced Budget**
  - 36 hands-on classes with 380 individuals attending
  - KC: S2S Proposal Development, KC: Proposal Development (Non-S2S), and KC: Advanced Budget Topics (offered ongoing)

- **OSP-specific training**
  - Proposal Review, Subawards, Negotiations: 7 sessions

- **Custom training**
  - Post-Award demo and Q&A: 3 sessions with 78 attending
Kuali Coeus resources: kc.mit.edu

<table>
<thead>
<tr>
<th>About Kuali Coeus</th>
<th>Training</th>
<th>Quick Reference Cards</th>
<th>FAQs</th>
<th>Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kuali Coeus is an enterprise-wide, cradle-to-grave, electronic system for the management of sponsored research. It combines the full functionality of Coeus with the ease of use of CoeusLite.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefits of transitioning to Kuali Coeus</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Kuali Coeus includes all of the modules of Coeus but also includes additional functionality, such as the Award module, which is not currently available in CoeusLite.</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Kuali Coeus is designed to be the interface of the Institute's entire Research Administration system, allowing users to easily navigate through the system.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ANNOUNCEMENTS**

<table>
<thead>
<tr>
<th>Date</th>
<th>Announcement</th>
</tr>
</thead>
<tbody>
<tr>
<td>February 8, 2016</td>
<td>Kuali Coeus Upgrade and Forums</td>
</tr>
<tr>
<td>December 21, 2015</td>
<td>Need help with one of your proposals? The KC Support team can help!</td>
</tr>
</tbody>
</table>

**Related Links**

- Kuali Foundation
- Grants.gov
- IS&T Services Status
- MyCOI
- CITI (Responsible Conduct of Research Training)

Registration, course books, presentations, and videos

34 QRCs on Navigation, Proposals, Reports, Awards, and Institutional Proposals

Generated from questions received by kc-help.

Request New Address Book Entry/Non-MIT Employee, New Sponsor, New Subaward Organization, etc
Kuali Coeus Update
Enhancements Update

• Partnered with KualiCo to meet two primary objectives:
  
  I. Address proposal development issues
  II. Update MIT KC to most recent version of Kuali Coeus

• Proposal Development Issues
  
  • Numerous fixes were applied to KC
  • KC Project Team prioritized fixes based on business needs and user feedback/pain points
  • OSP KC Project team has performed rigorous testing of systems updates using MIT data to ensure stability
KC Upgrade to latest version

• Released the weekend of February 13th

• OSP Forums: Kuali Coeus New Release

  Wednesday, February 17, 10:00 am - 11:30 am
  Wednesday, February 24, 1:30 pm - 3:00 pm

  Both held in Singleton Auditorium (46-3002)

• Release Notes and updated documentation
  will be made available at kc.mit.edu
Navigation Improvements
Search, Lookup, and Navigation

• When an In Progress or Revisions Requested proposal is opened with View, users with modify permissions will now have an Edit button available at the bottom of the screen allowing them to edit without closing and reopening from the Edit link in the PD search results.
New option to close a proposal from within the Proposal Budget without navigating back to the proposal.
Copy and Delete Proposals

- **In Progress** proposals (presently only those native to KC) can now be deleted by Aggregator.
- Users should no longer encounter Incident Report/error when copying proposals that contain Personnel Attachments.
- Copied proposals with Modular budgets retain all synced or manually input Modular Budget data from the original proposal.
### Proposal Summary

<table>
<thead>
<tr>
<th><strong>Title</strong></th>
<th>Kim Test 1511+ RESKC-820</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Principal Investigator</strong></td>
<td>Wood, Carol J</td>
</tr>
<tr>
<td><strong>Lead Unit</strong></td>
<td>069500 - Center for Transportation and Logistics</td>
</tr>
<tr>
<td><strong>Activity Type</strong></td>
<td>Organized Research</td>
</tr>
<tr>
<td><strong>Proposal Number</strong></td>
<td>30810</td>
</tr>
<tr>
<td><strong>Project Start Date</strong></td>
<td>02/22/2016</td>
</tr>
<tr>
<td><strong>Project End Date</strong></td>
<td>02/23/2017</td>
</tr>
<tr>
<td><strong>Include Subaward(s)?</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Sponsor Name</strong></td>
<td>NSF</td>
</tr>
<tr>
<td><strong>Sponsor Deadline Date</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Sponsor Deadline Type</strong></td>
<td></td>
</tr>
</tbody>
</table>

Buttons:
- Submit for Review
- Ad Hoc Recipients
- View Route Log
- Delete Proposal
- More Actions
- Close
Print Enhancements
# PD Budget – Print forms

## Budgets

The following budgets are linked to this proposal.

<table>
<thead>
<tr>
<th>Name</th>
<th>Version</th>
<th>Direct Cost</th>
<th>F&amp;A</th>
<th>Total</th>
<th>Start</th>
<th>End</th>
<th>Status</th>
<th>Comments</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>test</td>
<td>1</td>
<td>161,454.57</td>
<td>77,723.57</td>
<td>239,178.14</td>
<td>02/22/2016</td>
<td>02/23/2017</td>
<td>Incomplete</td>
<td></td>
<td>Add Budget</td>
</tr>
</tbody>
</table>

## Print budget documents

Select the documents below you wish to print:

<table>
<thead>
<tr>
<th>Print Forms</th>
<th>Print Budget Comments</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Budget Costshare Summary Report</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>2 Budget Cumulative Report</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>3 Budget Salary Report</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>4 Budget Summary Report</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>5 Budget Summary Total Report</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>6 Budget Total Report</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>7 Industrial Budget Report</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>8 Industrial Cumulative Budget Report</td>
<td>☑</td>
<td></td>
</tr>
</tbody>
</table>

[Print]
PD Budget – Print forms cont’d

Migrated proposals now print properly and display EB and IDC on Budget Print Reports:
- 3 - Budget Salary Report
- 5 - Budget Summary Total Report
- 6 - Budget Total Report

Various Formatting improvements on the following forms:
- Budget Cumulative Report - Subtotal & total display issues fixed
- “1 - Budget Costshare Summary Report” – Column headers now print when there are no personnel costs included in the budget year

Calculation Fixes
- 4 – Budget Summary Report - Indirect Cost Base correctly reflected when the Apply Rate in line item detail is unchecked.
<table>
<thead>
<tr>
<th>Cost Element</th>
<th>Description</th>
<th>Period 1</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>400365</td>
<td>Program Manager</td>
<td>$37,500.00</td>
<td>$37,500.00</td>
</tr>
<tr>
<td>400706</td>
<td>Research Asst - On</td>
<td>$30,810.00</td>
<td>$30,810.00</td>
</tr>
<tr>
<td>420600</td>
<td>Subcontracts - Subject to MIT F&amp;A</td>
<td>$25,000.00</td>
<td>$25,000.00</td>
</tr>
<tr>
<td>420620</td>
<td>Subcontracts - No MIT F&amp;A</td>
<td>$50,000.00</td>
<td>$50,000.00</td>
</tr>
<tr>
<td>422310</td>
<td>Tuition - RA - Not MTDC</td>
<td>$25,655.44</td>
<td>$25,655.44</td>
</tr>
<tr>
<td></td>
<td>Employee Benefits - Research Rate</td>
<td>$10,500.00</td>
<td>$10,500.00</td>
</tr>
<tr>
<td></td>
<td>OH - MTDC</td>
<td>$59,848.60</td>
<td>$59,848.60</td>
</tr>
<tr>
<td></td>
<td>Vacation - Vacation</td>
<td>$3,062.50</td>
<td>$3,062.50</td>
</tr>
<tr>
<td></td>
<td>Lab Allocation - Utilities - Lab Allocation - Utilities</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Lab Allocation - Salaries - Lab Allocation - Salaries</td>
<td>$5,598.60</td>
<td>$5,598.60</td>
</tr>
<tr>
<td></td>
<td>Lab Allocation - M&amp;S - Lab Allocation - M&amp;S</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Employee Benefits - EB on LA</td>
<td>$1,567.61</td>
<td>$1,567.61</td>
</tr>
<tr>
<td></td>
<td>Vacation - Vacation on LA</td>
<td>$457.25</td>
<td>$457.25</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>$250,000.00</td>
<td>$250,000.00</td>
</tr>
</tbody>
</table>
PD Budget – Print forms
(Lab Allocations)

• The “Allocated Lab Expense” is included as a line in the **Other Direct Costs** section of the following Budget Print Reports:
  – 1 - Budget Costshare Summary Report
  – 2 - Budget Cumulative Report
  – 4 - Budget Summary Report

• The Allocated Admin Support, EB & Vac on LA, and LA bases print correctly on the following Budget Reports:
  – 1 - Budget Costshare Summary Report
  – 2 - Budget Cumulative Report
  – 4 - Budget Summary Report
The “Allocated Lab Expense” is now included as a line in the Other Direct Costs.
Budget Enhancements
PD Budget

• Budget validations that have prevented users from Completing the budget, routing, or navigating the proposal have been revised.
  • Example: Missing Underrecovery Distribution

• Personnel Costs – Budget Personnel “Calculated Fringe” includes the total of individuals’ Vacation Accrual and EB costs

• Additional Confirmation/Warning prompts have been added to Proposal Budget, triggered when:
  • user clicks the Delete icon on the Periods and Totals screen
  • user clicks “Save and Apply to Other Periods” and the edits would change existing entries in future periods
## New validations

### Periods & Totals

<table>
<thead>
<tr>
<th>Period Start Date</th>
<th>Period End Date</th>
<th>Months</th>
<th>Total Sponsor Cost</th>
<th>Direct Cost</th>
<th>F&amp;A Cost</th>
<th>Unrecovered F&amp;A</th>
<th>Cost Sharing</th>
<th>Cost Limit</th>
<th>Direct Cost Limit</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/01/2016</td>
<td>01/31/2017</td>
<td>12.0</td>
<td>34,134.10</td>
<td>24,752.63</td>
<td>9,381.47</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>[icon]</td>
</tr>
<tr>
<td>02/01/2017</td>
<td>01/31/2018</td>
<td>12.0</td>
<td>33,447.70</td>
<td>24,312.63</td>
<td>9,135.07</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>[icon]</td>
</tr>
</tbody>
</table>

**Total:**
- Total: 24.00
- Total Sponsor Cost: 67,581.80
- Total Direct Cost: 49,065.26
- Total F&A Cost: 18,516.54
- Total Unrecovered F&A: 0.00
- Total Cost Sharing: 0.00
- Total Cost Limit: 0.00
- Total Direct Cost Limit: 0.00

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**Please Confirm to Continue**

Are you sure you want to delete period?

- [ ] Cancel
- [x] OK
New validations cont’d

After making changes and clicking Save and Apply to Other Periods, you will now receive a validation warning/confirmation.
• For migrated proposals, open and view Subaward RR Budget V1-3 form uploaded to the KC budget > Subaward section without errors.

• Copying Budget versions when there is a manual entry of a Subaward in Subaward section.

• MIT F&A/Overhead no longer calculated on Subaward Cost Sharing added via Subaward section of the budget.

• Multiple fixes to **Modular Budget** syncing and handling Subaward line items, cost sharing, LA and IDC.

• **Underrecovery** calculations for all OH Rate Type and UR Rate Type scenarios are working.
• **Single Point Entry** - when users click on “Object Code Name” field, a drop-down menu selection opens with blank search box. Users may enter the name or number in the search box, or scroll through the menu items to make their selection.
PD Budget
(Lab Allocations)

• Users no longer need to create separate custom groups for each budget person assigned to a period for lab allocation to properly calculate on the “4 - Budget Summary Report” and other Reports

• Budget Personnel "Calculated Fringe" field (in Details and in Budget Summary) now includes only the individuals' EB and Vacation, NOT the EB on LA or Vac on LA.
Certification and Disclosure
• The **Notify All** and **COI Disclosure Status** windows will better convey requirements according to Proposal Type, Proposal Sponsor, and Personnel Role.

• The **Notify All** window will now display only the names of those personnel in roles required to certify.

• The **COI Disclosure Status** window will display only those required to disclose according to responses given to certification answers, instead of listing all proposal personnel.
• A new Validation warning will appear when **Non-employees** are added to roles requiring certification. The warning will convey a different role on the proposal or an MIT employee guest account may be required.

• Proposal validation “COI Disclosure Not Complete” will now appear when appropriate, and will prevent routing.

• Email notification “All Proposal Persons Certified” no longer sent out when certifications for all investigators/key persons are not complete.
COI Disclosure Status window will only display those whose certification responses indicated a potential conflict.

Notify All window will only list those in roles requiring certifications.
Routing and Approval
• When re-routing Revisions Requested proposals, there is no longer an additional stop for the *Original Aggregator* to approve.

• PD Hierarchy children's status now match the status of the Hierarchy parent proposal, and do not remain *In Progress* when parent is routing or submitted.
From **Action List**, selecting *Show* for a Proposal Dev Document no longer produces an Incident Report. Now, **Proposal Summary** & **Budget Summary** are displayed with an “Open Proposal” link available at bottom of summary.
Proposal Development Hierarchy

• Changes to budget periods on a child proposal can now be synced to parent.
• Creating a Hierarchy parent proposal is possible without an Incident Report when the child has attachments uploaded.
• Parent budget amounts equal total of child budget, regardless of differences in Inflation rates among children.
• In the Hierarchy Parent budget Modular Budget screen, users can now sync data from the detailed budget, and Modular Budget checkbox can be now be edited in Parent’s Budget Setting.

Please email kc-help@mit.edu prior to syncing if assistance is needed.
System-to-System (S2S) Validations and Forms
• **Fixes to NIH Fellowship form population**

  • No longer need to enter info in the Visa Type field if there is info supplied from HR (behind the scenes). Aggregator will be able to print form and not get an Incident Report when no ‘dummy’ info in entered.

  • When there is NO HR data supplied for the person, user will now get a validation error message when printing, indicating that the citizenship info must be manually entered in the Visa Type field.

• eRA Commons ID can now be less than 6 characters when field is needed for other S2S Sponsors.

• **Delivery Info** section is now editable for S2S proposal
• While an S2S Linked PD is **Approval Pending**, the S2S Opportunity Forms to **Include for Submission** can now be edited by proposal Aggregator(s) and DLC users with Modify All Dev Proposals authorization, without requiring rejection of the proposal back to DLC.

• Improvements to several Grants.gov validation messages and Fix It paths.

• In Opportunity Search Screen, Opportunity ID field is no longer case sensitive.

• Fixes to Grants.gov RR_Budget-V1.1 form
  • Senior Personnel’s Months Effort, Salary, EB & Vacation now populate properly for migrated, and copies of migrated, proposals.

• Fixes to Grants.gov SF424 RR –V1.2 form
  • Field 4.a population, including for New proposals, using the Sponsor Proposal Number field.

• Fixes to Grants.gov SF424-V2.1 (non-RR) form
  • Project Title field 15 properly populating with Proposal Title, not PI Directory Title.
Award Additions
New Award Fields

New fields added to comply with OMB’s Uniform Grant Guidance.

- **FAIN ID**: Federal Award Identification Number (FAIN) is unique within the Federal agency, and required for each financial assistance award to assist recipients in correctly reporting subawards.
  - The Federal agency may not - with limited exceptions - modify the FAIN during the life of the award. Agencies use different formats. For example, NIH implements the FAIN by deriving it from the core elements of the grant number. For example, the FAIN for 1R01GM654321-01 would be R01GM654321. The field in KC is alphanumerical.
  - In KC this field is located in the Award tab → Details and Dates panel → Sponsor subpanel
New Award fields cont’d

• **Federal Award Year**: in YYYY format
  – In KC this field is located in the Award tab → Details and Dates panel → Sponsor subpanel

• **Federal Award Date**: the date when the Federal award is signed by the authorized official of the Federal awarding. Format is month, day, and year.
  – In KC this field is located in the Award tab → Details and Dates panel → Time & Money subpanel
Subaward
Module
Additions
Subaward New Fields

New fields added to comply with OMB’s Uniform Grant Guidance.

• Federal Award Project Description
  • In KC this field is located in the Subaward tab → Subaward panel

• F&A Rate
  • In KC this field is located in Subaward tab → Subaward panel
    (XX.XX format)
Subaward New Fields cont’d

de Minimus checkbox

• In KC, this field is located in **Subaward tab → Subaward panel**
Subaward New Fields cont’d

New fields added to comply with OMB’s Uniform Grant Guidance. Funding Source Details section: displays the FAIN ID, the Federal Award Date, Obligated Total, Sponsor and Prime Sponsor IDs, CFDA Number, and Activity Type fields.

In KC this section is located in Subaward tab → Funding Source panel → Current Funding Sources subpanel
Subaward New Fields cont’d

• The DUNS # of a Subrecipient now appears under their name.
Questions?
Thank you for attending!

Release Notes and updated resources will be made available at kc.mit.edu