Princeton ERA:
What's New and Different
for Proposals

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1   What's New and Different with Princeton ERA: Proposals?

Princeton ERA is replacing Coeus for the development and tracking of sponsored research proposals. This guide will explore key differences between Coeus and Princeton ERA including new terminology, concepts, and procedures.

1.1 New Terminology and Concepts

Princeton ERA uses new terminology, states, and user roles. This section explains how these relate to or differ from Coeus concepts.

1.1.1 Identifying Proposals

Coeus used Proposal Development numbers and Institute Proposal numbers to identify proposals. Princeton ERA will use new terminology and numbering schemas:

Funding Proposals: Proposals in Princeton ERA are called funding proposals and will be created within the grants module. Funding proposals may be called "FP" for short and are identified by their FP ID which is a 10-digit alphanumeric value starting with FP (e.g. FP00000001). All funding proposals are automatically numbered sequentially.

FP00000001

- **Budgets:** Funding proposals may have one or multiple budgets. They may also have associated cost sharing budgets or subaward budgets. The budgets will be linked to the funding proposal. Budgets will be identified by a 10-digit alphanumeric value starting with BU.

  BU00000661

- **SF424:** Proposals that will be submitted system-to-system will have an associated SF424 record. The SF424 will be linked to the funding proposal. It can be identified by the SF424 ID which is a 15-digit alphanumeric value starting with SF-424.

  SF-42400000057

1.1.2 Proposal States

Princeton ERA will allow you to track the status of your proposal, similar to Coeus. Princeton ERA introduces different states for workflow and proposal tracking.

Coeus Statuses

Proposal Development	Institute Proposal
•In Progress •Approval in Progress •Rejected •Recalled •Submitted	•Pending •Funded •Declined

In Princeton ERA, statuses are referred to as "states", and they are more specific compared to Coeus statuses, so it's easier to know where the proposal is in the workflow process. For example, if a proposal was status "approval in progress" in Coeus, it wasn't clear if the proposal was waiting on dept or ORPA approval. In the new system, it is obvious if it is at the department or specialist review stage.

If a proposal was rejected in Coeus, it was not clear who rejected it. In the new system, rejections are known as requesting changes, and it is clear who is requesting the changes.

Although to note in Coeus, when a proposal was recalled by the department administrator, the Coeus status was recalled; in the new system, recalled proposals return to the draft state.

The "JIT" or "Just-in-time Changes Requested" state is also new. While JIT is NIH specific terminology, this state applies to any sponsor and is used for changes needed after a FP is submitted and before it is awarded or is likely to be awarded. This state is used when the sponsor requests a revised budget, protocols need updates, or congruency review is needed.

Proposal States

- Draft
- Department Review
- Department Review: Response Pending from PI
- Specialist Review
- Specialist Review: Pending Changes by PI
- Pending Sponsor Review
- JIT Response Required
- Pending Sponsor Review Award Anticipated
- Award Notification Received
- Awarded
- Not Submitted
- Withdrawn from Sponsor
- Not Funded

Princeton ERA also has workflow bubbles, to help visualize where the proposal is in workflow. The bubble highlighted in orange indicates where the FP is in the workflow.

1.1.3 User Roles

Princeton ERA has new user roles to define the security access that departmental users and ORPA users have in the system.

Department Roles

Coeus	Princeton ERA
• **Aggregators** • **Viewers** • **Approvers**	• **Editors:** Can edit proposal • **Readers:** View only access to proposal • **Admin Contact:** Main dept person responsible for proposal and person who receives proposal email • **Reviewers:** Department approvers

In ERA, three roles are the same as Coeus roles. Editors are like aggregators, meaning they can edit proposals in editable states, readers are like viewers, meaning they can view but not edit proposals, and reviewers are like approvers for the dept. Princeton ERA has a new role called the Admin Contact. The Admin Contact is the main person responsible for this proposal and the person who receives proposal email automatically generated by the system.

ORPA Roles

In Coeus, the person in ORPA who approves the proposal is known as the ORPA GCA or ORPA Grant and Contract Administrator. In Princeton ERA, that person is known as the Specialist, and it is important to note that terminology because it is used throughout the application. When your proposal is nearing the award stage, the specialist may be your ORPA Award Specialist but at the proposal submission stage, this person is your ORPA GCA.

Coeus	Princeton ERA
• ORPA GCA	• Specialist

1.1.4 Email Recipients

Princeton ERA will also introduce new email notifications which are different and fewer than the current Coeus emails. They are also sent to less people.

See below for a quick summary of when automatic system generated notifications are sent and who the recipients are.

Submitting Department Reviewers
- Proposal Submitted

Admin Contact
- Department Requests Changes
- Specialist Requests Changes
- Final SPO Review Completed
- JIT Changes Requested

Editors + Admin Contact
- Award Letter Received

1.2 New Procedures

The new functionality that Princeton ERA offers will introduce new procedures. This section gives a high-level description of processes that are changing, but for more detail on the new processes and how-to guides please refer to the associated training manuals.

1.2.1 Departmental Approval

Princeton ERA will introduce changes to the departmental review process.

Coeus	Princeton ERA
•Submitting dept receives approval mail + needs to approve. •Submitting dept is a center: The PI's home dept also receives approval email + needs to approve. •3 PIs on a proposal + each PI is in a different dept: The submitting dept + and home units of each PI receives the approval mail + needs to approve. •Submitting or PI home dept is an engineering dept: SEAS also needs to approve	•Only the submitting dept receives approval email + needs to approve •Need to know when your PI is submitting in another dept? A report will be available.

1.2.2 Ancillary Reviews

Princeton ERA introduces a new concept of "Ancillary Reviews." Department administrators or ORPA users will add ancillary reviews to funding proposals to request the review of an additional person.

Ancillary review is a method of electronically sending a review request to another person or people associated with an office. It is a manual process, not an automated one. These reviews are separate from the workflow process.

A few reasons ancillary reviews can be sent are for:

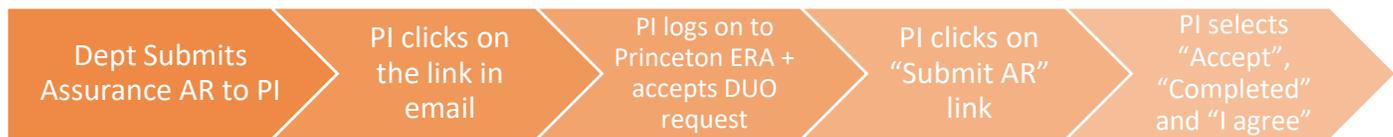- F&A waivers

- Cost sharing commitment approval

- Requesting PIs, co-PIs, and key people to sign their assurances

- Congruency review at the award stage

- Among other reasons

1.2.3 PI Assurances

The "PI Certification" is being renamed "PI Assurances."

The assurances can now be handled electronically within the Princeton ERA system. However, a paper method will still be available too.
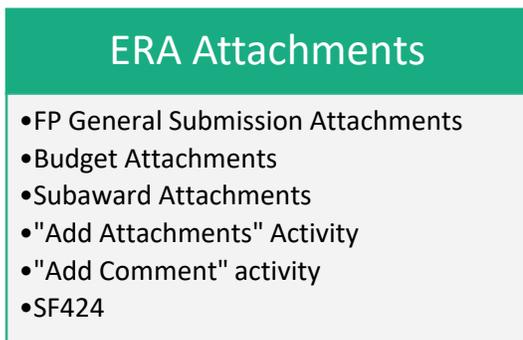
Electronic PI Assurance Process

Dept Submits Assurance AR to PI	PI clicks on the link in email	PI logs on to Princeton ERA + accepts DUO request	PI clicks on "Submit AR" link	PI selects "Accept", "Completed" and "I agree"

Paper Based PI Assurance Process

Dept Submits Assurance AR to themselves	Dept has the PI sign the form	Dept uploads the form to the AR via "Submit AR" link	Dept selects "Accept", "Completed" + "The signed Assurance Statement is uploaded…"

1.2.4 Attachments

In Coeus, Attachments were all uploaded to the narrative tab. In Princeton ERA there are many places you can upload attachments, which will be covered in more detail in the proposal manual:

ERA Attachments

- FP General Submission Attachments
- Budget Attachments
- Subaward Attachments
- "Add Attachments" Activity
- "Add Comment" activity
- SF424

Princeton ERA has an attachments tab on the funding proposal workspace where all documents will appear for viewing.

1.2.5 System-to-System Submission

Princeton ERA will also re-introduce system-to-system (S2S) proposal submission at Princeton, initially for most NIH opportunities.

Coeus

- S2S available for 8 years for NIH, DOD, DOE

Princeton ERA

- S2S available for most NIH opportunities initially

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1.2.6 Multi-Prong Approach

Princeton ERA allows for a new "multi-prong" approach for the submission and review of proposals. This means that final administrative components (attachments) can be submitted ahead of scientific components or research elements for review. The final administrative aspects will be "locked down" while department administrators and their PIs are still working on the research related documents. This new approach is based on recommendations from the "Task Force on Administrative Workload in Research."

The multi-prong approach is addressed differently for S2S versus non-S2S proposals.

Multi-Prong Approach for Non-S2S Proposals

Locked Down During Proposal Approval	Can add/revise/delete attachments at any time
• FP General Submission Attachments • Budget Attachments • Subaward Attachments	• "Add Attachments" activity • "Add Comment" activity to state when science is complete

Multi Prong Approach for S2S Proposals

- Almost all attachments submitted to the sponsor are in the "SF424"
- Upload all administrative components and submit for approval
- Upload all scientific components when they are ready
- Use the "Add Comments" activity to inform your Specialist when the scientific components are complete

Please review the Proposal Manual and S2S Manual for more details on these processes

1.2.7 Proposal Updates at Award Stage

The procedure to make updates to a proposal at the award stage will be different in Princeton ERA than Coeus.

Coeus	Princeton ERA
• Copy the PD—new PD # • Make budget + protocol updates in the copy • Obtain congruency reviews outside of Coeus + upload to the copy • Multiple PDs linked to 1 IP	• Update the existing FP for budget + protocols • Electronically send FP to RIA for congruency review

1.3 Need Help?

That is an overview of the large changes in Princeton ERA proposals—it is a lot of differences! We're here to help. Email your questions to erasupport@princeton.edu, and check out our training manuals and videos.