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Proposal Hierarchy

What is a proposal hierarchy?

Proposal hierarchy is a way of combining multiple smaller budgets (child budgets) into one big budget (parent budget).

Why create a proposal hierarchy?

There are many reasons why you may want to or should create a proposal hierarchy.

- A proposal has 2 or more co-PIs, and each PI wants to see his/her budget separately.
- Two or more departments are participating on a proposal, and each dept wants to see their budget separately.
- A sponsor pays different overhead and/or employee benefit rates on different cost elements.
  - Note: This is not the on/off campus case. On and off campus can be handled in the same budget screen. Double click on the line item and select the "off campus" radio button.
- NIH K99/R00 "Pathway to Independence" proposals where the first two years are at 8% OH and the last 3 years are at 62% OH
- NIH F99/K00 "Predoctoral to Postdoctoral Fellow Transition" proposal where the first 1-2 years are at 0% and the last 3-4 years are at 8%
**A Basic Understanding of Coeus and Proposal Hierarchy**

If you’ve never done proposal hierarchy before, the important concept to understand is the children are created first, then the parent (this is the opposite of the pre-Prime award module, where the parent is created first, and then the children). Any changes to the budget are made to the children, then synced to the parent proposal. The parent budget cannot be edited in the parent itself—all budget changes must be in the children and synced to the parent.

**Proposal hierarchy is different from other hierarchies!**

**Child proposals are created first, not the parent**

- Each with the same lead unit (different depts can each have a child proposal, but the lead dept starts each child proposal and assigns Coeus rights to the other depts to work in those proposals).
- Each with their own Proposal Development number
- Each with their own budget (a budget has to be started for each child in order to create the hierarchy)

**One child is chosen to create the parent**

- Select one of the children and use it to "create hierarchy".
- Coeus then copies the child you selected to create the parent. The parent has its own Proposal Development number which Coeus automatically assigns.
- Do NOT manually add a proposal as a placeholder for the parent

**Remaining child proposals are linked & synced to the parent**

- Open the parent proposal and link the other child proposals to it, or open each child proposal and link each to the parent (a budget has to be started in each child before it can be linked)

**Tips**

- Upload the narratives and enter special review information in child 1, not the parent (because if you have to create the hierarchy again, you'll copy the children, not the parent).
- Certify the investigator(s) and answer the YNQ in the parent. (If you do certify the investigator(s) and answer the YNQ in the child proposals, you will have to do it all over again in the parent.)
- The proposal hierarchy is only two levels, the top level parent and second level children. When the parent is routed for approval, the whole hierarchy is routed. The status of the child and parent proposals are the same.
- The lead unit of the parent and child proposals are always the same (Different depts can each have a child proposal, but the lead dept starts each child proposal and assigns Coeus rights to the other depts to work in those proposals).
- The lead PI of the hierarchy is the person checked off as the lead PI in the parent proposal.
- The lead PI can be chosen in the parent
Representation of a proposal hierarchy:

Proposal hierarchy tables

Create a proposal hierarchy table to make your life easier!

- Multiple PIs on one proposal:

<table>
<thead>
<tr>
<th>Child # or parent?</th>
<th>Proposal number</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child 1</td>
<td>00024787</td>
<td>Prof Smith</td>
</tr>
<tr>
<td>Child 2</td>
<td>00024788</td>
<td>Prof Jones</td>
</tr>
<tr>
<td>Child 3</td>
<td>00024789</td>
<td>Prof Grady</td>
</tr>
<tr>
<td>Parent</td>
<td>00024790</td>
<td></td>
</tr>
</tbody>
</table>

- Different OH rates on one proposal:

<table>
<thead>
<tr>
<th>Child # or parent?</th>
<th>Proposal number</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child 1</td>
<td>00024800</td>
<td>Items with OH at 33%</td>
</tr>
<tr>
<td>Child 2</td>
<td>00024801</td>
<td>Items with OH at 62%</td>
</tr>
<tr>
<td>Parent</td>
<td>00024802</td>
<td></td>
</tr>
</tbody>
</table>

- NIH K99/R00 proposal:

<table>
<thead>
<tr>
<th>Child # or parent?</th>
<th>Proposal number</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child 1</td>
<td>00028541</td>
<td>First 2 years at 8% OH</td>
</tr>
<tr>
<td>Child 2</td>
<td>00028567</td>
<td>Last 3 years at 62% OH</td>
</tr>
<tr>
<td>Parent</td>
<td>00028570</td>
<td></td>
</tr>
</tbody>
</table>
General proposal hierarchy creation, step-by-step

Create the **first child** proposal. (Note: The children are created before the parent!)

- Write down this proposal number (follow the example of the chart above).
- The lead unit for a child is the lead unit for the entire proposal
- Fill out the **Proposal** tab
  - You can include “child 1” in the title if you’d like
- Fill out the **Investigator** tab
  - If the hierarchy is being created because there is more than one PI and each PI wants to see his/her budget separately, enter the PI for this budget only

Add the **Budget** for child 1

- Include a brief description for each budget line
  - Why is the cost in *this* budget?
    - Different PI?
    - Different OH rate?
- Mark the budget as final and complete if possible
- You don’t have to, but it does simply your life
- You can mark it final/complete later if you need to
- If this child has cost sharing, enter and distribute the cost sharing in this budget.

Add ALL **Narratives and Special Review information** in child 1

- Why? If you need to copy your hierarchy, you have to copy the children and then choose a child to make the parent.
- So if your narratives and special review information were only in the parent, you will have to upload or add them all over again
- When you copy a parent proposal, it only copies the parent, it does not copy the children too. (It does not copy the hierarchy.)

**What not to do in Child 1**

- Do not answer YNQ (If you do, you’ll have to answer the YNQ again in the parent.)
- Do not certify the investigator (If you do, you’ll have to certify again in the parent.)

Create the **remaining child** proposals

- Write down the numbers for each child
- Create child proposals 2, 3, 4, etc
- Each child proposal has a different proposal number
- You could copy child 1 and make changes for child 2, or start child 2 from scratch
  - Copying is recommended because start/end dates will definitely be the same. (All child proposals must have the same start/end dates)
- Do not copy the narratives or budget. (The narratives are already in child 1 and don’t need to be duplicated in other child proposals. The budget will be different in each child.)
- Each child must have a budget before continuing! If a budget has cost sharing, enter and distribute the cost sharing in that child.
- Do not answer the YNQ or certify the investigators.
Create the hierarchy

- Note: Your child proposals must have budgets before creating the hierarchy
- They don’t have to be final and complete, but they have to be started.
- Open child 1 in Edit mode
  - From the Edit menu, select “Create Hierarchy”

If the proposal does not have a budget version marked “final” the following message will be displayed. Click OK to create a hierarchy using the latest version of the budget.

Coeus then displays this message with the parent proposal number, which is a higher number than the child. Write this number down too!
Open the parent in Edit mode

- Update the proposal title if necessary
- From the Edit menu, select “Link Child Proposal”

Select "Sub Budget" & click OK

- This means you want to include all budget line items
Search for Child 2, select it and click OK

- Child 2 has to have a budget.
- The start/end dates for child 2 have to be the same as child 1.

If the proposal does not have a budget version marked “final” the following message will be displayed. Click OK to create a hierarchy using the latest version of the budget.
Some Coeus narrative types are only allowed to exist one time in a proposal (For example, narrative, facilities, and equipment attachments can only exist once.) If child #1 has these types, they are synced to the parent. If child #2 also has these same types, they will not be synced to the parent because they can only exist one time in the parent. It’s better to upload attachments only in child #1 to avoid confusion.

Coeus then states the child has been linked to the parent

Repeat linkage with child 3, 4, etc

- All children have to have the same proposal start/end dates and all children must have a budget started.
- You could open each child proposal in Edit mode and from the Edit menu select "Link to Hierarchy", but it’s faster to open the parent proposal in Edit mode and link children to the parent

The Proposal tab icons display if the proposal is a parent (+) or child (-). A sync button is now in the second toolbar to sync changes from the children to the parent.
This proposal is part of a hierarchy and is the parent
This proposal is part of a hierarchy and is a child
This proposal is not part of a hierarchy

Now the parent and each child have a Proposal Hierarchy tab and a sync button in the second toolbar
Parent has the +

Child 1 (-)

Child 2 (-)

Click + to expand to see all budget versions

Goal is for all boxes to be green (synced) instead of red (not synced)

Click "show legend" button to see what all icons mean (click "Hide" to hide the legend)

Press sync button in the parent to sync all changes from child budgets to parent budgets

New tab!
If each child had a different PI, all PIs are listed on the Investigator tab

- Select one as the lead PI and lead unit in the parent

---

**Child 1:** Cava

**Child 2:** Sarmiento

---

**Parent proposal**

The parent displays the Child 1 PI & Child 2 PI.  
Child 1 PI is checked as lead.  
If needed, change the lead PI & lead unit here.

If you need to add more PIs, add them in the child proposals.
Review the parent budget. The parent budget shows all line items from each child.

- **Summary tab:** Sums all costs from all child budgets. The parent budget status cannot be changed to Complete unless the child budget statuses are all Complete.
- **Period tabs:** If a description was entered in each child, it makes it easy to see which items are from each child.

Parent budget can only be set to Complete if the child budgets are set to Complete.

Child 1 items (yellow -- Cava in the description)
Child 2 items (orange -- Sarmiento in the description)
By filling in the description, it’s easy to see which items are from which child proposal.
The parent total tab sums by each cost element across all budgets.

Make budget changes and mark budgets final and complete

- Budget changes can only be made in the children, not in the parent. Make the changes in the child proposal budgets and sync in the budget screen or sync outside of the budget screen. It’s faster to make the budget changes in each child, then open the parent and press the sync button in the parent, outside of the budget screen.
- Mark child budgets as final & complete, then sync.
- Mark parent budget as final & complete

If you need to make budget changes after marking the children and parent as complete:

- Mark the parent budget as incomplete
- Mark the child budgets as incomplete
- Make the changes in the child budgets
- Mark the child as complete and sync to parent
- Mark the parent as complete

Need to make narrative changes? Add or change them in child 1 and sync. Coeus tells you at the bottom of the parent narrative screen where the file was uploaded--that's where changes can be made.
With the parent open in Edit mode (after linking all child proposals)

- Answer the YNQ
- Certify the investigators
- Verify the lead PI or check off a different PI as the lead if needed

Submit

- Make final changes in parent
- Press sync one final time in the parent. In the parent, click on the Proposal Hierarchy tab, click on the + sign to expand all boxes and make sure all boxes are green, not red.
- Submit parent
- The status of all child proposals will be the same as the parent proposal, "approval in progress". (You may have to search for the proposals again to see the status update on the search results screen.)

Special Note about TBA people in proposal hierarchy

Special note about TBA people

- If there is the same TBA type in both child 1 and child 2, their job codes MUST be different
- For example, there are 2 TBA Grad Assistants, one in child 1 and one in child 2.
  - Child 1: TBA Grad Assistant, job code TBA1
  - Child 2: TBA Grad Assistant, job code TBA2
- If you don’t change the job codes to be different, Coeus will give an unclear error message.
Rights required for creating and maintaining hierarchy

General rights

In order to create a new hierarchy, you have to be an aggregator in the child proposal. (Aggregator is a Coeus role that means a person can do anything in a proposal including creating and submitting a proposal for approval).

In order to link the child proposals to the parent, you must be an aggregator in both the child and the parent proposals.

Assigning rights when there are multiple depts. on one proposal

In this example:
- There are 3 professors/depts. on one proposal.
- PRISM (a center) is the lead dept and will submit the proposal and administer the award if it is funded.
- Three PIs are on this proposal: one from EE, one from CS, and one from MAE.
- Each professor wants to see his/her budget separately.
- PRISM wants the dept administrator from each participating dept to enter their dept’s budget information.
- PRISM creates the three child proposals and assigns the budget creator or aggregator role to the other dept administrators.

- Assigning the budget creator role means the person with that role can only sync the budget to the parent (they have to be in the budget screen when they press sync.)
- Assigning the aggregator role means the person can sync the entire child proposal to the parent
- PRISM selects one of the child proposals to create the parent from (the child must have a budget).
- PRISM links the other child proposals to the parent (the other children must each have a budget).
- PRISM does the final sync and submits the proposal for approval.
Granting access / assign rights / add roles to a person who works in another dept to work in your proposal

1. Click on the Roles button
2. Click the Users button
3. Enter their user ID or last name with a * in the appropriate search box
4. Click Find
   
   alternative way to search: last name and *

Click on their name so the row is highlighted in blue

Click OK
Be sure to press save and then close the proposal. Now the person in the other dept can work in your proposal.

What if someone rejects the proposal and budget changes need to be made?

- Edit your proposal hierarchy
- Mark parent budget as incomplete
- Mark child budget(s) as incomplete
- Make changes to child budget(s)
- Mark child budget(s) as complete
- Sync
- Review parent budget
- Mark parent budget as complete.

Unlinking a child from a parent

If you realize you have selected the wrong proposal as a child proposal in a hierarchy:

- First make sure that the parent proposal budget is marked incomplete.
- Then open the child proposal in Edit mode.
- From the Edit menu, select “Remove from Hierarchy”.
- The child will then be removed from the parent.
The - sign indicates the child.

Remove from Hierarchy

Sync To Parent

Coeus
Are you sure you want to remove this proposal from hierarchy?

Yes  No
Unlinking or breaking the entire hierarchy

To remove all child proposals from a hierarchy, follow the instructions for unlinking and unlink all proposals.

NOTE: If you unlink all child proposals from a hierarchy, the parent will completely disappear—it is deleted and gone for good. The only way to “bring back” a parent after all children have been unlinked from it is to create the hierarchy again: select one of the children to create the hierarchy with, go to the Edit menu and select “Create Hierarchy”. Then open the new parent proposal (it will have a new proposal number, different than the old proposal number) and link the other children to it.

Copying a proposal hierarchy

- Copy each child from the old hierarchy
- Create a new parent from one of the copied children and link the other copied children to the new parent
  - That is why it is better to upload narratives in the children, preferably child #1, than the parent.
- If you copy the original parent, it’s not a hierarchy anymore—it’s a stand-alone proposal
  - It’s ok if that’s what you want to do, but you will have to open the budget in modify mode and press sync for the rates table to be populated.
Special tips for various proposal hierarchy scenarios

A proposal has 2 or more co-PIs

- Each PI wants to see his/her budget separately
- List the PI just for that child in the investigator tab and just the budget for that PI in the budget screen.
  - Child 1: Professor A
  - Child 2: Professor B
- Parent
  - Parent Investigator tab lists all child PIs.
  - Parent Budget is summed for all child budgets.
  - Check off the lead PI on the Investigator tab

2+ departments are participating on 1 proposal

- See the “rights” section in this proposal hierarchy chapter

Sponsor pays different OH and/or EB on different cost elements

- Example: Sponsor pays 62% on some cost elements, 33% on others.
- Child 1 is for one OH rate
  - Budget includes only the cost elements for that OH rate
- Child 2 is for the other OH rate
  - Budget includes only the cost elements for that OH rate

What about on/off campus rates in one budget?

- In one proposal, technically you can select if a line item is on campus or off campus in the line item details window and you wouldn’t have to use hierarchy, but in reality it is preferred that off campus items are entered in their own budget because it makes it easy for the Award Specialists to set up multiple projects at the award stage, one for on and one for off campus.

NIH K99/R00 proposals: How to make a proposal hierarchy when first 2 and last 3 years have different OH rates

K99 budgets are typically 5 year budgets. The first 2 years are at the 8% OH rate and the last 3 years are at the 62% OH rate.

Does your budget start on 7/1?

- Yes? You do not need to use hierarchy! Change the rates in the rates table in the budget.
  - OH & UR Rate type: “MTDC – custom”
  - In the rates table, scroll to the “MTDC –custom” section.
  - Change the first two years to 8%.
  - Change the last three years to 62%.
No? If your budget starts any other date, then you have to use hierarchy.

There will be 2 child proposals, one with a budget for the first two years and one with a budget for the last 3 years. The start and end dates for each of the child proposals will be for the entire 5 years, though.

- Create child 1. Even though this will be for the first two budget years, the start and end dates of the proposal are still 5 years: 9/1/17-8/31/22 for this example.

- Specify the student and the faculty member on the Investigator and Key Person tabs as appropriate.
• In the budget for child 1, choose MTDC-custom for both OH and for UR rate types.

• In the rates button on the second toolbar, change the "MTDC-custom" percentage from 0% to 8% for the fiscal years involved with the first 2 budget years. In this example, the first two years budget years cross three fiscal years (2018, 2019, and 2020). Click OK and Yes.
Enter budget items, generate and save. Now there are 5 years, but you only want budget items in the first two years.

Manually delete all items out of periods 3 through 5 so they are blank.

Use the delete button in the second toolbar to delete non-personnel costs.

Use the red baron to delete personnel costs, then use the delete button to remove the line item.
- At this time, mark the budget as final and complete, if you wish. Or you can mark it as Final but incomplete or final and complete. Negative underrecovery is ok. Save.

- Create child 2 for the budget (it will have a different proposal number from child 1). I highly recommend copying child 1 (but not the budget and not the narratives) so that the start and end dates are the same for both proposals, all 5 years.
In the budget for child 2, keep the default MTDC for both the OH and for UR rate types, since it's 62% OH.
• Go to the Budget Periods menu, Adjust Period Boundaries item.

• The Define Periods window then opens.

• Delete the first 2 periods, just leaving the last three years. Note the overall budget start and end dates are still 5 years, but just the last 3 periods (3 years) will be in this budget.

• Click OK and then click Yes to syncing.
- Even though the first tab is labeled as “Period 1”, it is really “Period 3”.

- Enter the cost elements and costs for year 3 in the “Period 1” tab. Generate. Periods 2 and 3 (corresponding to years 4 and 5) will appear. Make changes as necessary.
- At this time, mark the budget as final and complete, if you wish. Or you can mark it as Final but incomplete or final and complete. Save.

- Open Child 1 in Edit mode.
  - The hierarchy HAS to be created from child 1
  - Do NOT create the hierarchy from child 2
- From the Edit menu, choose Create Hierarchy

- It will tell you what the proposal ID is for the parent. Write down that number.
- Open child 2 in Edit mode.
- From the Edit menu, choose Link to Hierarchy.

- Select "sub budget" from the pop-up box that appears.

- Then enter the parent proposal number in the search box.
• Click OK. If your child does not have a final budget version marked, you will see a message letting you know the latest version will be used. Then click yes.
• If you were successful, it will tell you the child has been linked to the parent.

Now you can open the parent and go to the budget there. You'll see the first 2 years at 8% and the last 3 at 62%. Check out the total tab as well.

Also, when you are done you can mark your parent proposal budget as complete (by default, the parent budget is always marked as Final).
If you need to make changes to the child budgets:

- If you marked the parent budget as complete, you’ll have to change that to incomplete first.
- Then open the child proposal in edit mode, and open the budget in edit mode. Change the status of the budget from complete to incomplete.
- Make the changes you need to make in each child.
- Mark the budget as complete in each child.
- Press the Sync button in the second toolbar. This will then sync your budget changes to the parent.
- It’s probably best to do a final sync in your parent budget as well, before you mark the parent budget as complete. That will sync changes from both child proposals into the parent proposal.
- Mark the parent budget as complete

What about everything else (narratives, YNQ, certifications):

- You can upload all narratives in child 1, not in the parent.
- You will answer the Yes/No questions in the parent, not the child proposals.
- You will certify the investigator in the parent proposal, not the child proposals.
- If you have special review information, enter them in child 1.

How to make a proposal hierarchy with different OH or EB rates for cost elements

Sometimes a sponsor will pay different OH or EB rates depending on the cost element. Let’s say in one proposal, there will be domestic travel, reprints, foreign travel, faculty summer salary and a research assistant. The sponsor will pay the following:
1. The standard 62% OH rate will be paid on domestic travel, reprints, and the research assistant. The standard EB rate will also be paid on the research assistant.
2. 33% OH will be paid on foreign travel
3. 25% EB and 40% OH will be paid on faculty salary

In this case, 3 child proposals need to be created, one for each of the cases specified above.

1. Child 1:
   a. Create child 1 for case 1, standard rates for domestic travel, reprints and the research assistant.
   b. Specify the investigator on the investigator tab.
   c. In the budget for child 1, since the OH and EB are the standard rates, you don’t have to change the MTDC or EB rates.
   d. Enter the cost elements and costs for period 1, generate, and adjust in remaining periods as necessary. In the description, you can include that these are at the standard rates (it will be easier to understand later).
   e. If you are ready, you can mark the budget as final and complete; otherwise leave it as final and incomplete, or just incomplete. Save.

2. Child 2:
   a. Create child 2 for the budget with 33% on foreign travel (it will have a different proposal number from child 1).
   b. Specify the investigator in child 2.
   c. In the budget for child 2, change the OH and UR Rate Types on the Summary tab in the Budget to “MTDC –custom”.
   d. Press the Rates button in the second toolbar. Scroll down until you see “MTDC-Custom”. Change the On campus rate from 0% to 33% for each fiscal year.
   e. Enter the foreign travel costs. Specify “33% OH” in the description line (it will help for later) and generate periods. Adjust values in outlying periods as necessary.
   f. If you are ready, you can mark the budget as final and complete; otherwise leave it as final and incomplete, or just incomplete. Save.

3. Child 3:
   a. Create child 3 for the 25% EB and 40% OH will be paid on faculty salary case (it will have a different proposal number from child 1 and child 2).
   b. Specify the investigator in child 3.
   c. In the budget for child 3, change the OH and UR Rate Types on the Summary tab in the Budget to “MTDC –custom”.
   d. Press the Rates button in the second toolbar. Scroll down until you see “MTDC-Custom”. Change the On campus rate from 0% to 40% for each fiscal year. In the example below, I changed just the On campus rate, but if there will be an Off campus rate for your proposal, please change it there.
   e. Keep scrolling through the Rates section until the “Employee Benefits Research Rate” section. Change the rate from the standard default rate to 25% for each fiscal year.
   f. Enter the faculty summer salary costs. Specify “40% OH and 25% EB” in the description line (it will help for later) and generate periods. Adjust values as necessary.
   g. If you are ready, you can mark the budget as final and complete; otherwise leave it as final and incomplete, or just incomplete. Save.

4. Now let’s have Coeus create the parent and then let’s link all 3 children together
   a. Open Child 1 in Edit mode.
   b. From the Edit menu, choose Create Hierarchy
   c. It will tell you what the proposal ID is for the parent. Write down that number.
   d. Open the parent in in Edit mode.
   e. From the Edit menu, choose Link Child Proposal.
   f. Select Sub Budget.
   g. Enter Child 2’s proposal number in the search box, click Find.
   h. Highlight it in the search results list, click OK.
i. Coeus will then say it is linked.
j. Go back to the Edit menu and choose Link Child Proposal again.
k. Select Sub Budget.
l. Enter Child 3’s proposal number in the search box, click Find.
m. Highlight it in the search results list, click OK.
n. Coeus will then say it is linked. Now all three children are linked to your parent!
o. Now you can open the parent and view the budget there. You’ll see the three child budget cost elements in each period, one after the other. Because you labeled the description with OH and/or EB rates, it’s easy to see which line corresponds to a particular child.
p. Check out the Budget total tab as well. You will see the OH-MTDC line for the 62% OH. There is also one line for “OH-MTDC-custom” which combines the 40% OH rate on the faculty member and the 33% OH Rate on the foreign travel together. The EB line combines the standard EB rate for the research assistant with the 25%EB rate for the faculty salary.

If you need to make changes to the child budgets:
• If you marked the parent budget as complete, you’ll have to change that to incomplete first.
• Then open the child proposal in edit mode, and open the budget in edit mode. Change the status of the budget from complete to incomplete.
• Make the changes you need to make.
• Mark the budget as complete.
• Press the Sync button in the second toolbar. This will then sync your budget changes to the parent.
• It’s probably best to do a final sync in your parent budget as well, before you mark the parent budget as final and complete. That will sync changes from both child proposals into the parent proposal.

What about everything else (narratives, YNQ, certifications):
• You can upload all narratives and special review information in the child proposals, preferably child #1. Do not upload narratives in the parent.
• Answer the Yes/No questions in the parent, not the child proposals.
• Certify the investigator(s) in the parent proposal, not the child proposals.

What if the sponsor pays only part of the benefits, and the department is cost sharing the remainder of benefits, and at the same time is paying OH on some cost elements and no OH on others?

Sample proposal conditions: In this example, the sponsor is paying 20% TDC on some cost elements and no OH on others. Also, there is a cap on Employee Benefits (EB) of $5000. The remaining EB (difference in the normal, current EB rate) needs to be cost shared, and you’ll need to provide the department source for this. (An alternative is the sponsor is paying 25% EB (a percentage) instead of a flat rate ($5000). How to handle this alternative is shown in red italics below).

What to do??? You’ll need to set up a proposal hierarchy with two child proposals, and then create the parent. If you’ve never done proposal hierarchy before, the important concept to understand is the children are created first, then the parent (this is the opposite of the pre-Prime award module, where the parent is created first, and then the children). Any changes to the budget are made to the children, then synced to the parent proposal. The parent budget cannot be edited in the parent itself—all budget changes must be in the children and synced to the parent. The proposal hierarchy section of this manual explains proposal hierarchy in detail.

Let’s create the children first.

Child 1:
This is your first child proposal. This proposal will have 20% TDC, so on the budget summary tab, change the “OH Rate Type” and “UR Rate Type” to “TDC – custom”.

Then click on the Rates button (% sign icon) in the second toolbar. Scroll to “TDC – custom” and change the rate from 0% to 20% for every fiscal year (be sure to keep scrolling to see every fiscal year).

While you’re still in the Rates table, scroll to “Employee Benefits Research Rate” and change the benefits rate to 0%. (If your scenario is the alternative example where the sponsor is paying 25% EB, change the benefits rate to 25% here)

Enter all cost elements that have the 20% TDC overhead rate. Start each description with “20% OH” so as to make it easier to distinguish items in the parent budget later. (This might not make sense now, but it will later.)

You will see negative underrecovery, which is fine. (It’s positive underrecovery that’s a problem.)

Generate periods and make any necessary changes.

In the summary tab, Comments box, type comments to explain the situation, something such as “20% TDC overhead. Sponsor is paying $5000 EB as shown in the other child proposal” and anything else you wish to record. Adding detail here is great. (If your scenario is the alternative example where the sponsor is paying 25% EB, you can write: “20% TDC overhead. Sponsor is paying 25% EB as shown in this proposal. Remainder of benefit is cost shared as shown in the other child proposal.”)

If you’re done with the budget, mark it as final and complete.

Upload your narratives in child 1. Do not answer YNQ, do not certify, do not enter special review. You’ll do those things in the parent.

Child 2:

Start another proposal (you can copy child 1, but not copy the budget). This proposal will be 0% OH, so on the budget summary tab, change the “OH Rate Type” and “UR Rate Type” to “TDC – custom”. The default rate for “TDC custom” is 0%, so no changes need to be made in the rates screen.

Enter all cost elements that have the 0% overhead rate. Start each description with “0% OH” so as to make it easier to distinguish items in the parent budget later.

Now it’s time to enter the $5000 in EB the sponsor will pay. Enter FRINGE – Fringe Benefits cost element. Enter $5000 as the cost to sponsor (if just one person. If 2 people, enter $10,000, etc). The Description can be “0% OH – flat EB paid by sponsor”. Double click on the line item. Enter the difference between the $5000 and the standard overhead rate into the “cost sharing” box (If your scenario is the alternative example where the sponsor is paying 25% EB, you can skip this bullet point. The 25% benefit was already entered and calculated in the first child proposal.)

Next step is only if your scenario is the alternative example where the sponsor is paying 25% EB, add the FRINGE line and double click on it. The cost box will be $0 since it was calculated in child 1. Enter the difference between the 25% and the standard EB rate into the “cost sharing” box. You will have to have done the calculation in Excel.

Generate periods and make any necessary changes to cost and cost share.

In the summary tab, Comments box, type comments to explain the situation, something such as “0% overhead. Sponsor is paying $5000 EB per person per year. Dept xxxxx (where xxxxx is the unit picking up the costs) is picking up remainder of employee benefits.” Any other special scenario can be explained here.

Go to the Edit menu and distribute the cost share amount as usual.

If you’re done with the budget, mark it as final and complete.

Upload your narratives in child 1. It is easier to keep track of them and if you have to copy the hierarchy, you will copy the children and thus your narratives will be copied too.

Do not answer YNQ, do not certify, and do not enter special review here. You’ll do those things in the parent.
The parent:

- Now you’ll create the parent.
- Open child 1 in edit mode. Go to the Edit menu, select “Create Hierarchy”. Coeus will then display the parent proposal number. Write down that number.
- Close child 1. Open child 2 in edit mode. From the Edit menu, select, “Link to Hierarchy”. Coeus will ask you if you want to create a “Sub Budget” or “Sub Project”. Select “Sub Budget”.
- Coeus will then ask you to enter the parent proposal number. Once you’ve entered the number, then pressed OK, the children will both be linked to the parent.
- Open the parent in edit mode, open the budget screen and you will see your combined budget, with line items at 20% and others at 0%. If it all looks correct, set the budget to final and complete status.
  - In order to set the budget to complete status, you might have to close the budget screen, then press the Budget button again and set the status to complete from the “select budget” screen.
  - If the parent budget is not correct you will have to go back to each child in edit mode, change the status of the budget to incomplete, make the changes to the budget, and set the child budgets back to complete, then go back to the parent, press the SYNC button in the second toolbar, then review the parent budget again.
- Certify the PI, answer YNQ and, if required, enter special review data.
- Narratives should have been uploaded in the children, not in the parent.
- Then save and submit the parent for approval.