Coffee with ORPA: Princeton ERA Tips + Tricks

March 18, 2021

Kyle Burkhardt
Agenda

 Survey Highlights
 Tips and Tricks
 Coeus Retirement
Princeton ERA
Survey Highlights
February 2021 Survey Highlights

- 50 responses out of ~200 survey recipients
- Thank you for taking the time to provide your feedback!
- Overall positive
Highlights

3. Overall, Princeton ERA is more intuitive and easier to use than Coeus.
46 responses

82% strongly agree or agree
93% fully or mostly meets needs
Highlights

5. The budget functionality in Princeton ERA:
43 responses

- Fully meets my needs: 51.2%
- Mostly meets my needs: 23.3%
- Occasionally meets my needs: 20.9%
- Does not meet my needs: 7.6%

72% fully or mostly meets needs
After removing those who have not had an agreement yet, 82% fully or mostly meets needs
After removing those who have not had a subaward yet, 75% fully or mostly meets needs
Favorite Features

- Intuitive, user-friendly, easier to use, easy to access info
- Transparency of the steps, status, progress
- History tab
- S2S
- Drag and drop attachments
- Approval process
- Electronic assurances
- The agreements module
Suggestions For Improvement

› Budget
  › Not using an excel spreadsheet to calculate % effort
  › Not budgeting by % effort
  › Enter salary amount manually
  › Budget PDF should not lump all personnel salaries onto one line
  › Should not be confusing

› Easier process for adding non-institutional personnel

› Among many other suggestions
Suggestions That Exist (or Coming Soon)

- “Back to funding proposal” shortcut from proposal budget
- Ability for PI to complete Compliance Review in Princeton ERA
- A summary quick guide for S2S – just the steps in order
- Live classes – coming soon!
  - Brown bag lunch for subawards
  - Princeton ERA live hands-on zoom classes
  - Look for these on the Employee Learn Center—soon!
What one thing did Coeus do better than Princeton ERA?

- **Budget**
  - Adjusting the budget
  - Did not have to use % Effort
  - Salary amount could be manually entered

- Uploading all attachments in one place

- Nothing/not sure/can’t think of anything
Princeton ERA

▷ SaaS solution
  ▷ Limited customizations, can’t customize more
▷ Talked with Huron about your feedback
▷ Budgeting by person months: they’ve heard this request from many institutions and it’s on their roadmap
Searching Tips
Searching

- Princeton ERA searches are “begins with” searches
- % sign is the wildcard
## Searching Tips

<table>
<thead>
<tr>
<th>Field</th>
<th>Search Term</th>
<th>Search Results Returned</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>demo</td>
<td>Returns short titles that begin with demo</td>
<td>• Demo Proposal Excitement</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Demo Prep</td>
</tr>
<tr>
<td>Name</td>
<td>%demo</td>
<td>Returns short titles that contain “demo” somewhere in the short title...beginning, middle, or end</td>
<td>• Demo Proposal Excitement</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Demo Prep</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• NIH Demo</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Video Demo Proposal</td>
</tr>
</tbody>
</table>

- “Name” is the short title
- If you’re using the wildcard, the % sign does not need to be put after the search term, only before!
## Searching Tips – Proposal IDs

<table>
<thead>
<tr>
<th>Field</th>
<th>Search Term</th>
<th>Search Results Returned</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>10</td>
<td>Returns nothing</td>
<td></td>
</tr>
</tbody>
</table>
| ID    | %10         | Returns proposal IDs that contain 10 somewhere in the ID | • FP00001053  
|       |             |                         | • FP00000107  
|       |             |                         | • FP00000010  |

- Proposal ID searches in the Grants tab do not need FP when using the % sign
  - FP%10, fp%10, and %10 return the same list
# Searching Tips – Agreement IDs

<table>
<thead>
<tr>
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<th>Search Results Returned</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>10</td>
<td>Returns nothing</td>
<td></td>
</tr>
</tbody>
</table>
| ID    | %10         | Returns agreement IDs that contain 10 somewhere in the ID | • OTH0001053  
• REQ0000107  
• RA000000010  
• REQ0000010 |
| ID    | REQ%10  
req%10 | Returns subaward initiation or modifications that contain 10 somewhere in the ID | • REQ0000100  
• REQ0000010  
• REQ0000210 |
Searching Tips

<table>
<thead>
<tr>
<th>Field</th>
<th>Search Term</th>
<th>Search Results Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Sponsor</td>
<td>simons</td>
<td>Returns nothing</td>
</tr>
<tr>
<td>Primary Sponsor</td>
<td>%simons</td>
<td>Returns proposals with “The Simons Foundation” as the direct sponsor</td>
</tr>
</tbody>
</table>

• “Primary Sponsor” is the direct sponsor
Filter and Results

- Additional filters can be added
- Blue headers are sortable
Filters

- Appear to “stick” for your session—even after navigating away
- Use “clear all” to clear your search results

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>SmartForm</th>
<th>State</th>
<th>PI</th>
<th>Primary Sponsor</th>
<th>Submission Type</th>
<th>Application Deadline</th>
<th>Specialist</th>
<th>Submitting Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>FP00001020</td>
<td>A New Proposal</td>
<td>[Edit]</td>
<td>Not Submitted</td>
<td>NIH - National Institutes of Health</td>
<td></td>
<td>Funding Submission</td>
<td></td>
<td>Bringham</td>
<td>PSY-Psychology</td>
</tr>
</tbody>
</table>

Office of Research and Project Administration
Filtering Your Inbox

<table>
<thead>
<tr>
<th>Field</th>
<th>Search Term</th>
<th>Search Results Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>FP</td>
<td>Returns all proposals</td>
</tr>
<tr>
<td></td>
<td>fp</td>
<td></td>
</tr>
<tr>
<td>ID</td>
<td>!=fp</td>
<td>Returns all agreements</td>
</tr>
<tr>
<td>ID</td>
<td>!=req</td>
<td>Returns all proposals and agreements except subawards</td>
</tr>
</tbody>
</table>

Your inbox is your “to-do” list: proposals and agreements waiting for action from you
Dashboard

- Recently Viewed
- Easily access recently viewed proposals and agreements
Navigation Tips
Accessing Proposal SmartForms from the Grants tab

➢ Click the Edit link
➢ Click on the SmartForm to directly go to it
## Navigating Around

<table>
<thead>
<tr>
<th>When you’re on...</th>
<th>Clicking on....</th>
<th>Does this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Workspace</td>
<td>Blue Edit or Create Buttons (left navigation bar)</td>
<td>Opens SmartForms for that Workspace</td>
</tr>
<tr>
<td>Any SmartForm page</td>
<td>Exit button (lower right corner)</td>
<td>Returns the Workspace</td>
</tr>
<tr>
<td>Any Workspace</td>
<td>Breadcrumbs icon (upper left corner)</td>
<td>Opens breadcrumbs; click on the link you want to go to</td>
</tr>
</tbody>
</table>
Navigating out of the Budget, Subaward Budget, or Cost Share Budget Workspace

How to return to the Funding Proposal Workspace?

▷ Click on the >> breadcrumb and click on your proposal name
▷ Or, click on the proposal name on the workspace
Access Budget SmartForms
Navigate to the FP SmartForm from any Budget, Subaward Budget, or Cost Share SmartForm
Random Tips
Two Ways to Create New Proposals

Dashboard > Create > Grants > Create Funding Proposal

Grants > Create Funding Proposal
Three Ways to Create New Agreements

- Dashboard > Create > Create Agreement
- Agreements > Create Agreement
Three Ways to Create New Agreements
Related Projects

› FPs cannot be linked to other FPs
› Agreements can be linked to FPs
   › Through the agreements module
   › Or through the grants module
› Agreements can be linked to other agreements
   › Through the agreements module
Related Projects
Removing “Abandoned” Proposals from the Inbox

› Open the proposal
› Click on “Withdraw Proposal”
› Enter a reason
› Proposal is removed from your inbox
› State changes to “Not Submitted”
› Proposal appears on the Grants > “Proposals” and “Completed” tabs
Copy Proposal

➢ Search for and view the proposal
➢ Click “Copy” in the left navigation bar
➢ Enter a proposal name
➢ Ignore the checkbox
➢ Click OK
Where is the Copied Proposal?

- Three ways to access the copy
  - Click on the History tab of the original proposal
  - Click on the Grants tab
  - Click on the Dashboard
Copy Agreement

- Search for and view the agreement
- Click “Copy Agreement” in the left navigation bar
- Enter the agreement name
- Click OK
Where is the Copied Agreement?

Two ways to access the copy
- Click on the History tab
- Click on the Agreements tab
### Budgets Tab

#### Working Budgets

<table>
<thead>
<tr>
<th>Name</th>
<th>SmartForm</th>
<th>Date Modified</th>
<th>State</th>
<th>Funding Source</th>
<th>Total</th>
<th>In Financials?</th>
</tr>
</thead>
</table>

12 items per page
History Tab Tips: Proposals + Agreements

- Proposals: Defaults to 10 items
- Agreements: defaults to 25 items
- Click through the pages or increase the number of items displayed on the History tab
Proposal Deadline Date

- The date it’s due at the sponsor
- Mandatory field
- If there is no proposal deadline date, fill in 12/31/9999
Adding Comments in Princeton ERA

Proposals:
- “Add Comment” activity
- Records comment on the History tab
- Anyone who can view the proposal can view the History tab
- Can make it easier for reviewing the record later

Agreements:
- Does not have the Add Comment functionality
- Activities have a comments or notes box that are recorded on the History tab
Help Text

- Princeton ERA SmartForm pages have help text
- To view the help text, click the blue bubble
S2S

▷ As of 3/12/2021: 29 NIH proposals submitted via S2S
▷ New: DOD + DOE proposals can now be submitted via S2S
▷ S2S Guides
  ◦ Updated: S2S guide updated with DOD + DOE
  ◦ New: S2S Quick Guide listing the basic S2S steps
▷ Videos
  ◦ S2S series
  ◦ Coming soon: DOD + DOE videos
Princeton ERA Home Page

› Sometimes the “old” version of the guide is displayed
› “Force refresh” your browser to get the latest version
Admin Contact

- Each proposal + agreement should have an “Admin Contact”

- Who is the Admin Contact?
  - The department admin responsible for working on this proposal or agreement

- Admin Contact receives all email notifications for the proposal or agreement, including clarifications or requests for additional information
Admin Contact

› Agreements: Admin Contact defaults as the person creating the agreement

› Proposals: Admin Contact must be manually added on the Personnel SmartForm > Administrative Personnel section.
  › If the Admin Contact is left blank, notifications will be sent to the PI
Admin Contact

Most Princeton ERA email is sent only to the Admin Contact

Not the Admin Contact?
- You will not receive most Princeton ERA email
  - e.g. you will not receive agreement activation emails
- Ask the Admin Contact to forward notifications
- Periodically check the system
  - e.g. Agreements "Active" tab
Agreement Collaborators

» Agreement Collaborators are for co-PIs and editors
  » Manually fill in institutional co-PIs
  » Manually fill in agreement editors; dept editors do not default
Princeton ERA emails
Manually Sending Emails in Princeton ERA

- Proposals: “Send Email” activity
  - Any Princeton person
- Agreements: "Contact Owner” activity
  - Agreement Owner: ORPA GCA or ORPA subaward team member
- Email logged on the History tab.
- Sign your name so the recipient knows who sent the email.
- Email is sent from erasupport@princeton.edu.
Receiving Email from Princeton ERA

- Some emails are system generated
  - Proposal changes certain states
  - Agreement is approaching its expiration date

- Some emails are user generated
  - Proposals – Send Email
  - Agreements – Contact Owner
  - Ancillary Reviews

- Do not respond directly to emails from erasupport@princeton.edu
  - This creates an ERA Support Help Desk ticket.

- Use Send Email (Proposals) or Contact Owner (Agreements) activities
  - Records the response on the History tab
Agreements “Clarifications Requested” Email

› GCA or Subaward Admin requests clarifications
› Admin Contact receives a clarification notification
› Clarifications are not listed in the email
Agreements “Clarifications Requested” Email

The History tab has the changes requested

- Clarification Requested
  - Thompson-Siegel, Maureen
  - 2/16/2021 9:54 AM

Please make the following changes:
1. Update (ABC) item.
2. Upload (XYZ) document.

Thanks!
Agreements “Clarifications Requested” Email

› Make the requested changes in agreement SmartForms
› Select “Submit Changes” to return the agreement to the GCA or subaward admin
  › There is a Notes box to include any notes back to the GCA or subaward admin
  › Those notes appear on the History tab
History Tab Tips: Agreements

Filter by
- Activity
- “Author”
- Activity Date
Ancillary Reviews
Ancillary Review Tips

- Ancillary Review Quick Guide
  - Proposals
  - Agreements
PI Assurances

› As of 3/2/2021: 68% of proposal assurances were completed by the faculty member directly in Princeton ERA

› Lead PIs can complete the proposal Compliance Review page + the assurances AR directly in Princeton ERA

› Lead PI + Co-PI Quick Guides + Videos
  › Read quick guides + watch videos to see exactly what it looks like for the Lead PI + Co-PIs/Key Personnel
**Ancillary Review Example Email**

**FP00001076: Notification of Ancillary Review**

**To:** Eli Willis (testpi2)

**Link:** [FP00001076](#)

**PI:** Eli Willis (testpi2)

**Title:** CWO AR PI Example

A Funding Proposal has been assigned to you for ancillary review. Click the link above to access and review the submission.

<table>
<thead>
<tr>
<th>Review Type</th>
<th>Comments</th>
</tr>
</thead>
</table>
| Assurances  | Dear Eli,  
              Please complete the compliance review page and your PI Assurances.  
              Thanks!  
              Kyle |

*Required*
Ancillary Reviews

- Princeton ERA does not notify anyone when proposal ARs are completed
- Princeton ERA does not send reminders
- Check Reviewers tab + “Send Email” (proposals only) to remind ancillary reviewers
- Ancillary Reviews report
  - Report can be scheduled
## Proposals Ancillary Reviews Report Results

Report can be scheduled
Multiple Ancillary Reviews

<table>
<thead>
<tr>
<th>Activity</th>
<th>Author</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provost Office</td>
<td></td>
<td></td>
</tr>
<tr>
<td>This is for a lab/space change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Here is the description of the</td>
<td></td>
<td></td>
</tr>
<tr>
<td>proposed changes: (all changes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>listed).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thanks, Stacey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Existing Floor Plan.pdf</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposed Floor Plan.pdf</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elizabeth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>This is an IDC waiver request.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The justification for this</td>
<td></td>
<td></td>
</tr>
<tr>
<td>request is (ABC reason) and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>the amount of the request is $</td>
<td></td>
<td></td>
</tr>
<tr>
<td>45,234</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thanks, Stacey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compliance Review and PI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assurance request for lead PI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eli Willis.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assurance request for co-PI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tamara Lawrence</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Budget
Copy an Existing Budget

- Navigate to budget workspace
- Click “Make a Copy”
- Name your budget (very important!)
- Budget copy is on the FP workspace
Creating a New Budget from Scratch

- Navigate to Funding Proposal workspace
- Click “Create Additional Budget”
- Specify new budget name + PI
- New Budget SmartForm opens
Deleting a Budget

- Budgets can’t be deleted, but you can mark them here as “no”:
Deleting a Subaward or Cost Share Budget

- Open the workspace for that budget
- Select “Withdraw” activity
Hitting a Certain Budget Number

- Princeton ERA rounds
- Is your budget $1 more or less than you want it to be?
- Have a budget item where indirects is not charged?
  - Reduce or increase that item as needed
Hitting a Certain Budget Number

▷ All items have indirects calculated on them?
▷ Changing a budget item by $1 may result in a $2 difference due to the rounded indirects
Workaround: Hitting a Certain Budget Number

- Reduce a budget item by $1.
- Add the same budget item again on the General Cost Definition page for $1. Select that indirects should not be calculated on the item.
- The budget item will be listed twice, and indirects will be calculated on it except for the $1.
- Do not use “Other” for this.
Faculty: Which Appointment Type to Select?

9 Months

- Sponsor is not NIH
- Sponsor is NIH + the faculty’s base salary is under the NIH salary cap

12 Months

- Sponsor is NIH + the faculty’s base salary is at or over the NIH salary cap (because the cap is based on 12 months)
Faculty at or over the NIH Salary Cap

- 12 month appt type
- Use the NIH salary cap as the base
- Set inflation: No to avoid generating cost share
Non-Faculty:
Which Appointment Type to Select?

Non-Faculty
- Typically budgeted as 12 months

Grad Students, choose either:
- Sum 10 academic months + 2 summer months = 12 month type and base (recommended for S2S)
- Or budget 10-month appointment at the AY salary (10 month appt type + base) & 2-month appointment at the summer salary (2 month appt type + base)
Do I Have to Budget Personnel as Personnel?

› Even if the sponsor does not require a detailed budget, personnel should be budgeted at the detailed level within Princeton ERA.

› Why? Proposed effort now appears on the pending section of the Current & Pending Support report for Princeton ERA proposals.
Personnel Cost Sharing

» Personnel cost share can not be specified in the cost share budget
» Personnel cost share is not editable in the cost share budget
» Personnel cost sharing is generated in the Proposal Budget when the % Salary Requested is less than % Effort
» Need to update the personnel cost share?
  » Change the %Sal Req or Effort in the proposal budget
» No cost to sponsor, but there is effort?
  » Fill in % effort, and leave % Sal Req blank.
### Proposal Personnel Budget

<table>
<thead>
<tr>
<th>Period 1</th>
<th>Period 2</th>
<th>Period 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1/2021</td>
<td>7/1/2022</td>
<td>7/1/2023</td>
</tr>
<tr>
<td>6/30/2022</td>
<td>6/30/2023</td>
<td>6/30/2024</td>
</tr>
</tbody>
</table>

**Personnel Costs**

| Effort: | 11.1111 % | 11.1111 % | 11.1111 % |
| Sal Req: | 5.5555 % | 5.5555 % | 5.5555 % |
| FB Rate: | 35.5 % | 35.5 % | 35.5 % |

| Base: | $90,000.00 | $93,600.00 | $97,344.00 |

| Salary Cost Total: | $5,000.00 | $5,200.00 | $5,408.00 |
| Benefits Cost Total: | $1,775.00 | $1,898.00 | $1,974.00 |
| Personnel Cost Total: | $6,775.00 | $7,098.00 | $7,382.00 |

### Cost Share

**Personnel Budget Not Editable in Cost Share Budget**

<table>
<thead>
<tr>
<th>Period 1</th>
<th>Period 2</th>
<th>Period 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1/2021</td>
<td>7/1/2022</td>
<td>7/1/2023</td>
</tr>
<tr>
<td>6/30/2022</td>
<td>6/30/2023</td>
<td>6/30/2024</td>
</tr>
</tbody>
</table>

**Person: Eli Willis (testpi2)**

| Sal Req: | 5.555555500000005 % | 5.555555500000005 % | 5.555555500000005 % |
| Base: | $90,000.00 | $93,600.00 | $97,344.00 |
| Salary: | $5,000.00 | $5,200.00 | $5,408.00 |
| Benefits: | $1,775.00 | $1,898.00 | $1,974.00 |
| Total: | $6,775.00 | $7,098.00 | $7,382.00 |

| Salary Cost Total: | $5,000.00 | $5,200.00 | $5,408.00 |
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| Personnel Cost Total: | $6,775.00 | $7,098.00 | $7,382.00 |
Multi-Prong Approach
Multi-Prong Approach

› Method of submitting the final admin components for GCA review, ahead of the final science/research attachments

› Used when the admin components are finalized ahead of the scientific components

› What are admin components/attachments?
  › Title, budget, budget justification, abstracts & RFP
  › Biosketch and/or C&P (if required by RFP)

› What are research attachments?
  › SOW, narrative, research strategy, or project description
What to do when the Admin Pieces are Finalized?

- Upload all admin components/attachments
- Use the “Add Comment” activity to note you are using multi-prong
- Submit for dept review—don’t keep it in draft.
- After your dept reviewer approves, your GCA can start reviewing the admin components
What to do when the Research/Science Attachments are Finalized?

▶ Upload final research/science in “Add Attachments”
▶ Use “Add Comment” to indicate research/science is complete
▶ Let your GCA know
S2S and Multi-Prong Approach

- Upload all admin components/attachments to the proposal and/or SF424 as appropriate
- Leave the SF424 in the pre-submission state
- Add Comment: multi-prong approach is being used
- Submit for dept review—don’t keep it in draft
- After your dept reviewer approves, your GCA can start reviewing the admin components
S2S and Final Research/Science Attachments

- Upload final research/science in SF424
- Validate SF424: “Valid for Submission” state
- Use “Add Comment” : it’s final!
- Let your GCA know
Awarded Proposals
Awarded Proposals

- As of 3/12/2021: 92 out of 674 Princeton ERA proposals submitted to the sponsor have been awarded
- Need to create a supplement or renewal for an awarded Princeton ERA proposal?
Supplements + Renewals

Do not use the “Create Funding Proposal” button
Revisions + Renewals

▷ Search for awarded FP
▷ Click “Create Renewal” or “Create Revision”
▷ A supplement in Princeton ERA is a Revision
Revisions (Supplements)

- Have same FP root number as the originally awarded proposal
- End in -REV1, -REV2, etc
- Most info from the original proposal is copied except:
  - Deadline date, compliance page answers, ancillary reviews
Renewals

- No info from the original proposal is copied
- New FP number
NIH Resubmissions

- NIH declined the Princeton ERA proposal
- Submitting a resubmission
- Search for “Not Funded” NIH FP
- Click “Create Resubmission”
NIH Resubmissions

- Have same FP root number as the originally declined proposal
- Resubmission ID ends in -RES1
- Most info from the original proposal is copied except:
  - Deadline date, compliance page answers, ancillary reviews
Coeus Retirement
Considerations for Coeus Retirement Date

- We will decline or award Coeus pending proposals through Aug 2021
- Coeus Premium requires a Java license for each user
  - Yearly license
  - License cost is covered by SAGIT until Dec 2021
- The exadata server that hosts Coeus expires June 2023
- OIT migrating all applications to the cloud by June 2023
- If Coeus needs additional life support, we’d have to pay for it
  - We’re no longer under a Coeus support contract
- Goal is to retire Coeus by Dec 2021
What does “Coeus Retirement” actually mean?

- Coeus Premium + Lite applications will no longer exist
- Coeus database will no longer exist
Princeton ERA team has met with
- Anne Marie Phillips, University Record Retention Guru
- RIA
- Export Controls
- Champions
- Subawards

Princeton ERA team is still to meet with
- OGC
- DOF
- SRA
- CEFR
- OTL
- OAC
What Coeus documents + data are we keeping?

**Documents**
- Attachments in Coeus

**Data**
- Data entered into fields throughout Coeus

**Keeping**
- Extracting from Coeus and putting somewhere TBD
For:
- Closed Coeus awards with Record Retention dates after 8/31/2021
- PS CNV + AWD awards with Record Retention dates after 8/31/2021

We’re looking at “keeping” the following:

<table>
<thead>
<tr>
<th>Coeus Award Module</th>
<th>Coeus Subaward Module</th>
<th>Coeus Institute Proposal Module</th>
<th>Coeus Proposal Development Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Attachments tab attachments</td>
<td>• We’ll reach out to sponsors to ask if we need to retain invoices</td>
<td>• Attachments screen attachments</td>
<td>• Narrative screen attachments</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Personnel screen attachments</td>
</tr>
</tbody>
</table>

Above is about attachments, not data

We’re still working out if we need to keep Special Review + YNQ data or not
Other Notes

➤ Crosswalk
  ➤ To link Coeus PD+IP, Coeus subaward, Coeus award, PS Award ID to each other

➤ IRB module
  ➤ No data or attachments will be extracted

➤ Data and attachments associated with awards that have RR dates 8/31/2021 and earlier will not be extracted

➤ Declined proposals will not be extracted
Concerns We’ve Heard So Far

How will I know how many proposals were submitted or awards received by a PI or by my dept?

- Coeus IW reports will still exist (PI + co-PI)
- Prime IW reports will still exist
- Tableau Sponsored Research Dashboard will still exist (2012 + later; lead PI)

I use proposals from the past (including declined proposals) as a template for the proposal I’m submitting right now

- Opps, rules, and procedures change
- At least a year’s worth of proposals will be in Princeton ERA

I look at the budget module for budget data / I look at the budget justification for C&P effort commitments / I look at the original proposal data

- Those items would have been included in the Coeus proposal attachments, and those attachments are being extracted if they are associated with awards with record retention date after 8/31/2021
Coeus Retirement
Q+A
Thank You!