

COEUS PREMIUM PROPOSAL DEVELOPMENT CHECKLIST

Before submitting your proposal for approval, use this checklist as a guide to make sure you have included all the necessary components of the proposal. Refer to Training materials for detailed instructions.

PROPOSAL TAB

- Does the Narrative have a check beside it?
- Does the Budget have a check beside it?
- Is the Lead Unit Number correct for the PI?
- Is the PI's Descriptive Title less than 82 characters? (NIH specific)
- Are the Start and End Dates correct?
- Is the Proposal Type correct?
 - **Continuation** = a non-competing continuation of an existing award
 - **New** = for new applications
 - **Resubmission** = amended or revised application
 - **Renewal** = competing continuation of an existing award
 - **Revision** = a supplement or change proposal for an existing award
 - **Task Order** = a project funded under a master agreement
- Is the Activity Type correct?
 - The Activity Type selected will determine the rates that are applied to the proposal budget.
- Is the Sponsor (Sponsor Code) correct?
 - Use the defined NIH Institute / NIH (000471) should only be used when the more defined institute is unknown.
- Is the Prime Sponsor field complete?
 - Enter the Prime Sponsor if submitting as a subawardee; otherwise enter **No Prime Sponsor (000867)**.
- Did you enter the Sponsor Proposal Number, if applicable?
 - Check sponsor instructions for what should be entered in the Federal Identifier field. Required field for NIH / NSF Resubmission, Revision, Renewal, and Change/Corrected.
(For NIH it should be in 2-ltr; 6-digit format CA123456)
- Did you enter the prior Award No. for Revision, Renewal, or Continuation submissions?
- Did you enter the Original Proposal No. for Changed/Corrections, Revisions, Resubmissions or Progress Reports?
- Is the NSF Code selected?
- Is the Notice of Opportunity / Special Program selection correct?
- Is the Subcontract checkbox marked if applicable?
- Is the Funding Opportunity Number or CFDA Number correct?
- Is the proposal connected to Grants.Gov?
- For NSF submissions** - did you enter the Agency Program Code and Agency Division Code?

ORGANIZATION TAB

- Are there any additional Performance Sites (Locations) entered?
- Is the address completed for each entered Location?

MAILING INFO TAB

- Is the Deadline Date & Type entered?

INVESTIGATORS TAB

- Are all PIs, Co-PIs & Co-Investigators based on the Proposal Development Investigator definition listed on the Investigator Tab?
- Did you enter the weighted average of proposed effort for the total project period in terms of percent for each Investigator?
- Are all the Investigators listed in this tab certified in Coeus?
- Are the printed & signed certifications at OSP?

KEY PERSON TAB

- Are all the key people listed, as well as significant contributors, consultants, and mentors?
- Are the Key Person Roles entered?
- Did you enter the weighted average of proposed effort for the total project period in terms of percent for each Key Person?
- If there are key personnel, did you answer "Yes" for YNQ 0B17 & list the individuals that need to complete Brown's COI disclosures in the Explanation field?
- Did the necessary Key Personnel fill out the Conflict of Interest and other necessary forms?

PROPOSAL PERSONNEL SCREEN

- Did you attach the required Personnel documents (Biosketches, Other Support, etc.) for all Investigators and Key Personnel?
- Are the Biosketches in the correct format (refer to sponsor requirements)?
- Did you verify the Person Details (eRA Commons User Ids, email addresses, directory title, and address)?
 - **For NIH Submissions** – Does their eRA Commons User ID in Coeus match their eRA Commons ID in Commons?
 - **For NSF Submissions** - Does the PI email address in Coeus match their email address in their Fastlane Profile?
- Did you verify the Degree information for each person? (Rolodex entered persons require manual entry of degree info).

SPECIAL REVIEW TAB

- If your proposal has Human Research Participants or Laboratory Animal Care did you include them in this tab?
- If the Human Research Participants or Laboratory Animal Care protocol is approved, did you enter the approval date in the Appr. Field?
- If the Human Research Participants protocol is exempt, did you include the appropriate exemption code in the comments box?

SCIENCE CODE TAB

- Applies only to Bio-Med: Is the correct code/description filled out? (Can select up to 4 keywords).

OTHERS TAB

- Are there any foreign countries involved with the project? If so, did you identify which countries in the Country fields?
- Did you fill out the total number of Grad Students?
- Did you fill out the total amount of Other Fees?
- Did you fill out the total amount of the Stipend?
- Did you fill out the total amount of Student Tuition?
- If there are subcontracts with this proposal, have you entered the Subcontractor PI(s)?
- For NASA submissions** – did you enter the NSPIRES User Name?

GRANTS.GOV SCREEN

- Review Grants.gov forms being submitted to sponsor.
- For Change / Corrected applications, is that Submission Type selected on the Opportunity Tab?
- Are all the appropriate Forms on the Forms Tab checked to "Include" (i.e. Modular Budget, Subaward Budget, Cover Letter)?
- Does the proposal pass the Grants.gov Validation?
- Do all the Uploads attach to the forms in the appropriate fields?
- Does the R&R Budget form display Senior and Other personnel correctly (# of professionals, person months, salary, and fringe benefits)?

ABSTRACT SECTION

- Did you enter Brown's required Proposal Abstract in the Layman Abstract of the Abstracts section?
- For NSF Submissions** – If required by the notice of opportunity, did you list Suggested Reviewers or Reviewers Not to Include in the respective Abstract types?

NARRATIVE MODULE

***Note** – Please refer to the Sponsor instructions for which Narrative Types to include with your proposal submission.

- Did you upload the final and correct versions of all the narratives necessary for business review?
- Did you verify that the correct narratives were attached to the corresponding Narrative Type?
- Are all narratives marked as "Complete"?
- Are all narratives in the sponsor required format (i.e. word or PDF, margins, header/footer, etc.)?
- If the submission is a Special Program, did you upload the sponsor instructions?

YES/NO QUESTIONS

- Are all of the questions reviewed & answered?
 - Brown's institutional and regulatory issues are addressed in this section. Did you mark "Yes" to any regulatory or institutional issues that apply to this proposal?
- Are the Explanation fields complete for questions that require explanations?
- Did you verify Question 0B16 – Is the maximum F&A rate allowed by the sponsor?
- Did you enter the names of other individuals involved in this project considered "Investigators" (any person who is responsible for the design, conduct, or reporting of research) in the explanation field of Question 0B17?
- Are the answers appropriate to this sponsor/submission?

PREPARE FOR ROUTING

- Did you run the Validation Checks?
- If warnings / errors exist, have they been corrected?
- Did you Validate with Grants.Gov
- Are the printed & signed certifications at OSP?
- Are additional required approvals included in the proposal submission (i.e. Cost Sharing)?

Acknowledgment: Thank you Vanderbilt Medical School, MIT & the Coeus Consortium for their supporting documentation on which this is based.

BUDGET MODULE

Detailed Budget

- Are Direct, Indirect, and Total costs entered for each period of the budget?
- Review / Confirm the F&A rates applied to the proposal.
- Did you review the Budget Persons Table / Window?
 - Does each individual have the appropriate **Appointment Type** selected and the correct **Effective Date** & Calc. **Base Salary** entered?
 - Effective date on budget Persons screen has been updated to reflect effective data of salary listed
- Are all NAMED and TBA personnel entered correctly in the Personnel Budget Details of Salary Line items?
 - Are Start & End Dates correctly entered for the period of the work?
 - Was the correct Period selected?
 - Was both the % Charged & % Effort entered for each individual paid under that line item?
 - Budget salaries have been reviewed and seem accurate.

Name	Job Code	Start Date	End Date	Period	% Charged	% Effort	Salary
Nair, Poovenderan S.	1070	01-Jun-2010	31-Aug-2010	Summer	50.00	50.00	\$17,510.00
Quinn, Jennifer L.	1070	01-Jul-2010	31-Aug-2010	Summer	50.00	50.00	\$14,852.60
Schaeset, Marisa J.	1070	01-Jun-2010	31-Aug-2010	Summer	10.00	10.00	\$3,151.80

***Note** – To populate the Grants.gov forms appropriately, all personnel must be included in the Personnel Budget Details of the Personnel Line Item / Subcode that they will be paid from.

- Does the budgeted personnel effort match the stated amount in the budget justification?
- Is the Budget Justification uploaded in the Narrative Module?
- Did you review each period of the budget?
- Is there Cost Sharing indicated?
 - If yes, Cost Sharing approvals should be uploaded in the Narrative Module and the account covering the cost sharing entered in the Cost Sharing Distribution window?
- Are any equipment purchases of \$3,000 or more broken out onto separate lines?
- If there are subcontracts, are the sub award budgets appropriately uploaded in the Sub Award section of the budget?

Modular Budget

- Did you sync the Modular budget to the Detailed Budget?
- Did you mark it as Modular on the Budget Summary Tab?
- Are all of your modules correct and consistent?
- Did you recalculate the IDC base using the Modular Total Direct Cost if need be?
- Did you include the Modular Budget justifications?

General

- Did you mark a budget version as Final?
- Did you mark the selected final budget as complete?
- Did you select the appropriated Budget Forms to be included in the Grants.gov submission?