Today’s Agenda

- Process from Proposal Development to Institutional Proposal to Award using Kuali Coeus
  - Other Useful Tools: IUIE, MyRA
- Searching Techniques
- Anatomy of an Award: Locating Key Information in an Award
- Award Hierarchy
- What can Medusa do for you?
- Practicing searches and viewing key items
- The new Award Notice
The KC Proposal to KC Award Process

- KC Document number
- KC proposal number

Route a Proposal in KC Proposal development

ORA staff review, approve and submit to sponsor

KC assigns an Institutional Proposal ID number

Institutional Proposal is the ‘glue’ for the proposal and award.

Agency Awards

- Agency makes an Award
- Specifies dollars amount, project start and end dates

ORA staff review, accept and administers the award.

KC assigns an award number

- Award Hierarchies tell a story

KFS Account is created

- KC Award and KFS are integrated
Searching for an Award
KC Searching Tips

• Institutional Proposal (InstProp) is a key search tool
• The InstProp will be issued in the same way as FIS proposal is now
• Using Medusa view, InstProp will yield helpful information
  • The InstProp links ‘back’ to the proposal development document
  • It links ‘forward’ to the award number
• The award number connects to the InstProp and to the account number, yielding a continuous view of the project’s progress.
• Additional search tools include ORG codes, sponsors, account number and PI name
Searching by Proposal Document Number
Search for Institutional Proposal by Unit ID

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<th>Actions</th>
<th>Institutional Proposal Id</th>
<th>Proposal Type</th>
<th>Activity Type</th>
<th>Status</th>
<th>Lead Unit ID</th>
<th>Lead Unit Name</th>
<th>Account ID</th>
<th>Project Title</th>
<th>Sponsor ID</th>
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<th>Principal Investigator</th>
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<th>Initial Requested End Date</th>
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Award Search by Co-PI
Award Search by Award Status and Lead Unit ID

Award Lookup

- **Award ID:**
- **Sponsor Award ID:**
- **Account ID:**
- **Award Status:** Underwrite
- **Sponsor ID:**
- **Award Title:**
- **Investigator:**
- **Lead Unit ID:** BL-SOC
- **Lead Unit:**
- **OSP Administrator:**
- **Archive Location:**
- **Archive Date From:**
- **Archive Date To:**

21 items retrieved, displaying all items.

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Viewing an Award
Key Award data fields: Lead Unit ID, Activity Type, Account ID, Sponsor ID, Sponsor Award ID, Start/End Dates, Anticipated and Obligated Amounts
What is an Award Hierarchy?

- Allows separate Award document for each budget period or Unit allocation
- Proposal Development includes full Project Period, not just the first year
- KC Award will display the future, anticipated funds
- Future award years have a status of pending
- Eliminates the need to route a new Proposal Development document for Continuations
Most Common Hierarchy: Will have 1 or more B levels representing the funding period and the account. May have C levels.
Award Hierarchy Shown in Award Actions Tab
Medusa View: Displays a hierarchical view of linked KC documents. A summary of key fields are included for each document.