

Creating Board of Regents Support Fund (BoRSF) Proposals

These instructions should be used to create and route BoRSF proposals. BoRSF programs include Department Enhancement (Comprehensive and Targeted), Industrial Ties Research Subprogram (ITRS), Proof of Concept/Prototyping Initiative (P-o-C/P), Research Competitive Subprograms (2-3 years and 1 year), and Awards to LA Artists and Scholars Program (ATLAS).

BoRSF Notices of Intent are not routing in GeauxGrants.

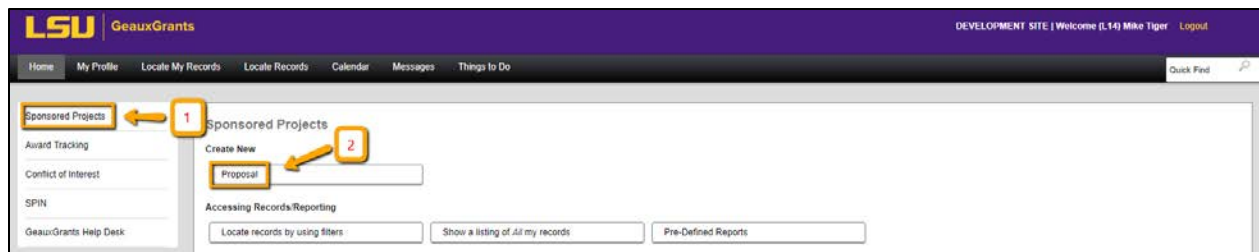


Visit [OSP's Board of Regents Support Fund Programs webpage](#) for budget and budget justification templates, At-A-Glance documents, deadlines, and other useful information.

How to Create a Proposal Development (PD) Record

It is recommended that you use Chrome or Firefox for GeauxGrants. Login through myLSU.

- Step 1: From the home screen, select “Sponsored Projects” on the left hand navigation tabs.
- Step 2: From the Sponsored Projects screen, select “Proposal” under Create New.



New Proposal Questionnaire

The New Proposal Questionnaire consists of several steps (Steps 0-7). To go back a step, click Back on top right. All search fields are progressive text.

- **Step 0:** Defaults to user. You can change to another Principal Investigator (PI) by clicking Change. Type last name, first name of PI and click Select.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be

Step 1: Create a "New" Proposal or "Copy From Existing"?

Tiger, (L13) Mike the [Change](#)

Create a New Proposal
Copy From Existing Proposal

Continue

- **Step 1:** Click on "Create a New Proposal" and click Continue

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be

Step 1: Create a "New" Proposal or "Copy From Existing"?

Tiger, (L14) Mike the [Change](#)

Create a New Proposal
Copy From Existing Proposal

Continue

- **Step 1 Continued:** Choose Setup Proposal Manually and click Continue.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be

Step 1: "New" or "Copy From Existing"?

Step 1: Continued

Tiger, (L14) Mike the [Change](#)

Create a New Proposal
Setup Proposal Manually

Continue

- **Step 2:** Choose Proposal Type and Click Continue.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be

Step 1: "New" or "Copy From Existing"?

Step 2: Please Select a Proposal Type

Bilal, Gina Larpenier [Change](#)

Create a New Proposal
New

Continue

- **Step 3:** Enter Sponsor Name – LA Board of Regents. This field is progressive text, and you only need to enter part of name (i.e. La Board). Make sure you click on correct name and click Continue.

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be

Step 1: "New" or "Copy From Existing"?

Step 2: Proposal Type

Step 3: Select a Sponsor

Tiger, (L13) Mike the [Change](#)

Create a New Proposal
New

LA Board of Regents (BOR)

Continue

- **Step 4:** Will be automatically numbered by the system
- **Step 5:** Enter Proposal's Title and click Continue. ***This must match the NOI submitted in LOGAN for ITRS, P-o-C/P, RCS, RCS 1Yr, and ATLAS.***

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be Tiger, (L14) Mike the [Change](#)

Step 1: "New" or "Copy From Existing"? Create a New Proposal

Step 2: Proposal Type New

Step 3: Selected Sponsor Alfred P. Sloan Foundation

Step 4: "Tracking" Number or "Proposal" Number This proposal will be automatically numbered.

Step 5: Proposal's Title
This is a test manual proposal for Dept Admin

Continue

- **Step 6:** Enter Project Start and End Dates and click Continue. ***Start date should be June 1, 2021, for all programs End dates should be June 30.***

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be Tiger, (L13) Mike the [Change](#)

Step 1: "New" or "Copy From Existing"? Create a New Proposal

Step 2: Proposal Type New

Step 3: Selected Sponsor LA Board of Regents (BOR)

Step 4: "Tracking" Number or "Proposal" Number This proposal will be automatically numbered.

Step 5: Proposal's Title Same BOR proposal.

Step 6: What are the project start and end dates?
From 01-Jun-2021 To 30-Jun-2024

Continue

- **Step 7:** You will need to adjust number of budget periods since Year 1 is 13 months. After updating. Click Continue.
 - Targeted ENH, P-o-C/P, RCS 1Yr, and ATLAS = 1 Period
 - RCS and ITRS = 1-3 Periods
 - Comprehensive ENH = 1-5 Periods

New Proposal Questionnaire

Step 0: Confirm you intend for the PI of this proposal to be Tiger, (L13) Mike the [Change](#)

Step 1: "New" or "Copy From Existing"? Create a New Proposal

Step 2: Proposal Type New

Step 3: Selected Sponsor LA Board of Regents (BOR)

Step 4: "Tracking" Number or "Proposal" Number This proposal will be automatically numbered.

Step 5: Proposal's Title Same BOR proposal.

Step 6: Project Start and End Dates 01-Jun-2021 to 30-Jun-2024

Step 7: How many years and/or budget periods would you like? 3

*NOTE: If you need additional years/periods beyond 7, you may add them as needed once inside the proposal.

Continue

- Click Back or Step back through responses button at any step to go back to the previous step to change information.
- Ensure all information is correct and click Create Proposal.

New Proposal Questionnaire

Back

Step 0: Confirm you intend for the PI of this proposal to be
Tiger, (L13) Mike the Change

Step 1: "New" or "Copy From Existing"?
Create a New Proposal

Step 2: Proposal Type
New

Step 3: Selected Sponsor
LA Board of Regents (BOR)

Step 4: "Tracking" Number or "Proposal" Number
This proposal will be automatically numbered.

Step 5: Proposal's Title
Same BOR proposal.

Step 6: Project Start and End Dates
01-Jun-2021 to 30-Jun-2024

Step 7: Number of Budget Periods
3

Is all of the above information correct?

***NOTE:** Clicking "Create Proposal" will create a new proposal with the properties you have indicated above. There is one final screen of questions to be completed before you can start entering your new proposal. Again, you will be able to change the properties of the proposal once it has been created if need be.

Step back through responses

Create Proposal



Click Done on top left to close out the proposal. Do not close browser using X on top right.

Done

Save

This is a test manual proposal for Dept Admin.
(L14) Mike the Tiger - (SUAM | Sch of VETM | Pathobiological Sciences (Alfred P. Sloan Foundation)

Record/Institution #
equivalent to SPS#

Project
AMF000001

Show
Completed

Setup Questions

Setup Questions

Setup Questions

GeauxGrants will automatically generate a Proposal/Record/Institution #. GeauxGrants numbering will be AMFYXXXX. For Fiscal Year (FY) 2021, all numbers begin with AM21.

This tab gathers general information about your proposal. After you complete this section, additional proposal tabs will appear to the left of the screen.



Hover your mouse over ? icons to see instructions or definitions.

Proposal Summary

Project?

Sponsored project?

ation

this Submission?

HELP INFORMATION

The sponsor selected on the New Proposal Questionnaire appears here. Click **Change** to update. Changing the sponsor may change the available Submission Mechanism/Screen Template for Grants.gov submissions.

- Read instructions at the top of the page, answer all questions. Click Save at any point to preserve all data entered. Clicking Completed will validate form and will prompt user to save changes by clicking OK.
- **Deadline:** Enter deadline date as the date you would like OSP to submit your proposal. All proposal must be submitted by OSP before 4:30 PM on the following days:
 - Department ENH: 10/26/2020
 - ITRS and P-o-C/P: 11/02/2020
 - RCS and RCS 1Yr: 11/09/2020
 - ATLAS: 11/23/2020
- **Associated Departments:** If the proposal includes investigators from multiple units or the PI has a joint appointment, the Associated Department will need to be added in order for the investigator's associated unit heads/administrators to view the proposal.
 - To add associated departments (i.e. CCT, CAMD, joint appointments, etc.), click Show on top right. **NOTE:** Show button is only available to Department Administrators and OSP.

- If the PI has a joint appointment, click Add next to PI Departments.

- This field is progressive text and you only need to enter part of name of the Cost Center to populate. Click Select.

- You will then see a toggle by the PI Departments. The unit that is marked will be the Primary Department for the proposal and any resulting award. Select and then click Save in top Left.

TIP!

The Primary Department will administer the award in Workday.

Associated Departments [?] LSUAM | Sch of VETM | Pathobiological Sciences [Add](#)

PI Departments [?] ☒ LSUAM | Sch of VETM | Pathobiological Sciences [Add](#)
☐ LSUAM | ORED | CCT Director's Office [Remove](#)

- Click Add to add the additional Associated Departments.

General Proposal Properties

Will your proposal involve the use of Human Subjects? [?] ☐ Yes ☒ No

Will your proposal involve the use of Laboratory Animals? [?] ☐ Yes ☒ No

Will your proposal involve multiple principal investigators? [?] ☐ Yes ☒ No

Will your proposal be a training grant? [?] ☐ Yes ☒ No

Associated Departments [?] [Add](#) LSUAM | Sch of VETM | Pathobiological Sciences

PI Departments [?] [Add](#) LSUAM | Sch of VETM | Pathobiological Sciences

- This field is progressive text and you only need to enter part of name of the Cost Center to populate. Click Select.

Department [Select](#) [Close](#)

LSUAM | ORED | CCT Director's Office

Filter by Institution

Louisiana State University and Agricultural and Mechanical College ▼

TIP!

You must click Show each time you add a unit to add additional units.

LSU Questionnaire

This is where we capture compliance, budget and specific information about your proposal. This is also where we will record Investigators for F&A & Project % Credits.

- Answer all mandatory questions. Yes answers may include a prompt for additional information. Click Save at any point to preserve all data entered. Clicking Completed will validate form.

TIP!

Make sure to answer correctly before routing as many of these questions trigger an approval step in the route.

Done Save This is a test manual proposal for Dept Admin.
(L14) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Alfred P. Sloan Foundation)

Proposal AM200151

Setup Questions
LSU Questionnaire
 Budget
 Personnel
 Internal Uploads & Routing
 Tasks
 Proposal Tracking (PT)

Data Collection

LSU Questionnaire
 Answer all questions and complete all required fields (*). When done, check Complete at top right of page.
 Proposal #: AM200151
 * Proposal Title:
 This is a test manual proposal for Dept Admin.

Compliance Information.

* 1) Human Subjects records or samples? (Please go back to Setup Questions tab to change answer if needed)
 Yes ☐ No ☒

* 2) Vertebrate animals? (Please go back to Setup Questions tab to change answer if needed)
 Yes ☐ No ☒

* 3) Recombinant DNA, infectious agents, transgenic plants or animals, human or primate cells/tissues or biological toxins?
 Yes ☐ No ☒

* 4) Radiation sources? This includes projects that involve sources of radiation, use of CAMD, or use of Class 3B or 4 lasers.
 Yes ☐ No ☒

* 5.) Export Controls
 * a.) LSU personnel to hand carry, deliver or ship equipment, components, materials, or software on media internationally?
 Yes ☐ No ☒
 * b.) Export-controlled, confidential or proprietary information to be received on campus?
 Yes ☐ No ☒
 * c.) Restrict foreign national participation or dissemination of results (e.g. publication restrictions)?
 Yes ☐ No ☒
 * d.) Development of encryption software?
 Yes ☐ No ☒
 * e.) A portion of the work to be conducted outside of the U.S?
 Yes ☐ No ☒
 * f.) Foreign sponsor or foreign researcher involvement (non-LSU employees)?
 Yes ☐ No ☒
 * 6) Special data security requirements (e.g. NIST 800)?
 Yes ☐ No ☒

Validate Complete

- For BoRSF, Question #15 “F&A Reduction or Waiver (including sponsor limited rate)” should be answered Yes – Sponsor Published Rate
- For BoRSF Question #16 “Is Tuition Remission allowed per sponsor published guidelines” should be answered No. BoRSF does all cost sharing of Graduate Assistant Tuition Remission.
- For BoRSF Question #17 “Cost sharing/matching” should be answered Yes – Sponsor Mandated. Cost sharing is a review consideration so it is allowed, but should not exceed 1:1 with the exception of ATLAS.

*** 15) F&A Reduction or Waiver (including sponsor limited rate)?**
 Yes ☒ No ☐
 * Select Type:
 Sponsor Published Rate

*** 16) Is Tuition Remission allowed per sponsor published guidelines?**
 Yes ☐ No ☒

*** 17) Cost sharing/matching?**
 Yes ☒ No ☐
 * Select Type:
 Sponsor Mandated

- For BoRSF Question #2 “RFP/Announcement – Enter URL or Attach RFP on Internal Uploads and Routing tab” – you do not need to include link to RFP. Instead type in the program name for the proposal (e.g. Comprehensive ENH, Targeted ENH, ITRS, P-o-C/P, RCS, RCS 1Yr, or ATLAS.)
- Question #26 - Investigators % F&A Distribution & % Project Credit:
 - Step 1:** You will enter the Investigator Name, Role, Department, and %. If an investigator has a joint appointment and is required to split his/her credit between units, you will need to enter them twice. To add additional investigators or departments click the Add button.

*** 26) Investigator**

* Investigator	* Role	* Department	* % F&A Distribution	* % Project Credit	
Tiger, (L14) Mike the	a) Principal Investigator	LSUAM ORED CCT Director's Office	50.00	0.00	X
Tiger, (L14) Mike the	a) Principal Investigator	LSUAM Sch of VETM Pathobiological Sciences	50.00	100.00	X

Add

- Step 2:** To enter the Investigator Name or Department, click the pencil icon. For Department, begin typing the Cost Center name in Find Department. Once it appears, click on unit name and then click Select.

Departments Close

Find Department: LSUAM | ORED | CCT Director's Office Locate **Select**

- Louisiana State University and A&M College
 - Conversion
 - Louisiana State University A and M
 - School 1



If you do not know the name of your Workday Cost Center. Go to Workday, and type the Cost Center number in the Search bar to display the Cost Center name used in GeauxGrants.

LSU

CC00268 LSUAM | ORED | CCT Director's Office - Cost Center

- After you answer all mandatory questions, click Complete. Checking the Complete box will perform Validations. Click Ok on pop-up box to show errors.

Done Save This is a test manual proposal for Dept Admin. (L14) Mike the tiger - scholar (sch of vetm | Pathobiological Sciences) (filled in clear instructions)

Data Collection

These Mandatory Questions need to be completed

Step Question

(2) Researcher's DNA, infectious agents, to emerging plants or animals, human or genetic influences on biological research?

Update Complete

Budget Tab

- The Budget tab will open in a new window. Clicking Done will close just the budget screen and return user to Proposal Development record.
- You must use required excel budget templates found on the [OSP Board of Regents Support Fund Programs website](#) and upload in GeauxGrants on the Internal Uploads and Routing tab.



You will only enter, total direct costs and F&A on the Budget Tab.

Budget – Setup (Updates Dates and Add Cost Sharing Sources)

- First, you need to update the budget period dates. Click Budget and then click Setup in left menu.

The screenshot shows the 'Budget Setup' interface. At the top, there are 'Done' and 'Save' buttons, and a title bar that reads 'Sample BOR proposal. (L13) Mike the Tiger (LA Board of Regents (BOR))'. On the left is a vertical menu with options: Budget, F&A, Cost Sharing, Justifications, Versions, and Setup. The 'Setup' option is highlighted with a yellow box. The main area is titled 'Setup' and contains several tabs: GENERAL, PERIOD/DATES, BUDGET SOURCES, and MECHANISM OPT IN/OUT. The 'GENERAL' tab is active. It contains the following settings: 'Use Scheme dates or Project Anniversary for inflation dates?' with radio buttons for 'Scheme' and 'Anniversary' (selected); a checkbox for 'Display Quantity and Unit Columns in Budget Detail' which is unchecked; 'Default Person Months/Percent Effort Picklist on the Personnel Tab' with a 'Person Months' dropdown; 'Default Person Months/Percent Effort Picklist on the Budget Tab' with a 'Person Months' dropdown; 'Decimal Precision' set to '0'; and an 'Alternate Currency' section with a checkbox for 'Track alternate currency on this proposal' (unchecked) and a 'Currency Rate 1.00000' with a 'Set' button. At the bottom, there is a 'BUDGET VALIDATE' section with a 'Budget Validate' button.

- Click on Period/Dates Tab and update the budget period so that year 1 is 06/01/2021-06/30/2022. Outyears should run July 1 – June 30. Click Save.

Sample BOR proposal.
(L13) Mike the Tiger (LA Board of Regents (BOR))

Budget +

F&A

Cost Sharing

Justifications

Versions

Setup

Setup

GENERAL **PERIOD/DATES** **BUDGET SOURCES** **MECHANISM OPT IN/OUT**

Project Period

START	END
01-Jun-2021	30-Jun-2024

Shift Project Dates

	New	Old
Project Start		01-Jun-2021
		30-Jun-2024

-Or-

Shift by days

Budget Period

BUDGET PERIOD	START	END
1	01-Jun-2021	30-Jun-2022
2	01-Jul-2022	30-Jun-2023
3	01-Jul-2023	30-Jun-2024

Year 1 = 06/01/2021 - 06/30/2022.
Future years = July 1 - June 30

- Second, you need to update the sources of cost sharing. Click Budget Sources Tab.

Sample BOR proposal.
(L13) Mike the Tiger (LA Board of Regents (BOR))

Budget +

F&A

Cost Sharing

Justifications

Versions

Setup

Setup

GENERAL **PERIOD/DATES** **BUDGET SOURCES** **MECHANISM OPT IN/OUT**

SOURCE	CHARGE TO	SHORT NAME	ACTUAL %	AMOUNT	ACCOL
SRC 1	LA Board of Regents (BOR)	Sponsor	100.000	175,000	
SRC 2	LSUAM Sch of VETM Pathobiological Sciences	Institution	0.000	0	
SRC 3	LSUAM Sch of VETM Pathobiological Sciences	Above the Ca	0.000	0	
Total			100.000%	\$ 175,000	

Add New Source Add Source

- There are two default sources of cost sharing: Institution and Above the Cap (related to NIH salary cap which LSU does not use). The Charge To sources default to the PI's department.

- Under the Charge To column, change to the department/college providing cost sharing. In the Short Name column, add an acronym for the unit.
- To include additional sources, type at the bottom of the chart. Field is progressive text. Choose from name that appears. Click Add New Source.
- For institutional cost sharing that will be documented via a journal entry, change Charge to column to Louisiana State University and Short Name of LSU.

Budget Detail for: (L14) Mike the Tiger

Detail | Appointments | Justifications | **Cost Sharing**

Effort Periods | Committed Effort | Save and Close | **Save** | Close

COST SHARING BY BREAKDOWN | **COST SHARING BY BUILD UP** | **+ ADD SOURCE**

SOURCE	CHARGE TO	SHORT NAME	ACTUAL %	AMOUNT	ACCOUNT NUMBER	DELETE
SRC 1	Alfred P. Sloan Foundation	Sponsor	95.951	236,976		
SRC 2	LSUAM ORED Vice President Research	ORED	0.000	0		
SRC 3	LSUAM Sch of VETM Pathobiological	Vet School Dean	0.000	0		
Albe			Total	100.000%	\$ 246,976	
Albemarle Corporation						

Type Additional Source here.

Budget – Subawards

- To add a Subaward to a budget, click Show next to SubAwards on the Budget tab to expand this section.

Non-Personnel (hide)

PERIOD 1 | PERIOD 2 | DIRECT COSTS

No records to display.

Subtotal Non-Personnel: \$ 0 | \$ 0

Select Budget Category | Add Item

SubAwards **Show**

- GeauxGrants requires you to list the Subaward Institution Name and Subaward PI Name in the budget. Both fields are progressive text. Enter both and click Add Subaward

SubAwards (hide)

INST/CONTRACTOR NAME | SHORT FORM | PERIOD 1 | PERIOD 2 | DIRECT COSTS

No records to display.

Subtotal SubAwards: \$ 0 | \$ 0 | \$ 0

Begin typing to select a Subaward Institution name | Begin typing to select a subawardPI | Add Subaward | Import

Click if Subaward PI's name is not in GeauxGrants



If Subaward Institution is not in GeauxGrants, complete Request to Add Subrecipient form at
https://lsu.edu/geauxgrants/help/sponsored_projects/geauxgrants_new_subrecipient_request.php

- If Subaward PI is not in GeauxGrants, enter Subaward Institution and click Add New Profile to enter the Subaward PI's information.

SubAwards (hide)

INST/CONTRACTOR NAME | SHORT FORM | PERIOD 1 | PERIOD 2 | DIRECT COSTS

No records to display.

Subtotal SubAwards: \$ 0 | \$ 0 | \$ 0

Nicholls State University | Add New Profile | Begin typing to select a subawardPI | Add Subaward | Import

Click if Subaward PI's name is not in GeauxGrants

Type Subaward Institution Name

Type Subaward PI's name

Click to Add Subaward to budget

- At minimum you need to enter the Subaward PI's First and Last Name and Department. For Grants.gov applications that require the Senior/Key Person Profile, you will be prompted on the Personnel tab to enter more information. Click Save.
- Click Add Subaward on Budget tab.

New Profile

Salutation First Middle Last Suffix

Title

Address

City State Zip County

Country

Phone Fax Email

Department - Or Add New - Department of Biology

Save Close

- When you click Add Subaward, the subaward budget pops-up.
- Enter the Subaward's Direct & F&A amounts per year and click Save and Close.

Nicholls State University

Costs by "Budget Period"

Budget Category Subawards/Subcontracts

PERIOD	START DATE	END DATE	DIRECTS	F&A	TOTAL	
1	01-Jan-2020	31-Dec-2020	0	0	\$ 0	Remove
2	01-Jan-2021	31-Dec-2021	0	0	\$ 0	Remove
			\$ 0	\$ 0	\$ 0	

Save and Close Save Close

- You will notice the SubAwards (1) tab to the left. Click this and then the SubAward Number link to edit the subaward budget, if needed.

Budget – Non-Personnel

- For BoRSF, you will only enter the yearly total direct costs less subaward amount in GeauxGrants under Other Direct Costs. Begin typing Other, and select Other Direct Costs from drop down. Click Add Item

Non Personnel [Hide]

No records to display.

other [Add Item]

Other Services

Participant Support Costs - Other

Other Direct Costs

Subtotal Non-Personnel: \$0 \$0 \$0 \$0

- On the popup, click Cost Sharing and then Cost Sharing by Build Up. Enter total direct costs less any subawards in the applicable Cost line. Enter requested funds under Sponsor and cost sharing funds under the applicable source of cost sharing. These number should match the internal BoRSF spreadsheet. Click Save and Close.

Non-Personnel Costs

Detail Justifications **Cost Sharing** Show Calculations **Save and Close** Save Close

COST SHARING BY BREAKDOWN COST SHARING BY BUILD UP + ADD SOURCE

SPONSOR [Hide]

	PERIOD 1	PERIOD 2	PERIOD 3
Percent	100.000	100.000	100.000
Cost	75,000	50,000	50,000
Type			
Category			

PBS [Hide]

	PERIOD 1	PERIOD 2	PERIOD 3
Percent	0.000	0.000	0.000
Cost	10,000	10,000	10,000
Type			
Category			

LSU [Hide]

	PERIOD 1	PERIOD 2	PERIOD 3
Percent	0.000	0.000	0.000
Cost	0	0	0
Type			
Category			

F&A

- F&A is automatically calculated based on the federally negotiated rate for Program Type and Location (on-campus vs. off-campus) of the project.
- For BoRSF, you will need to adjust the base/rate at the top of the page.
 - For RCS, RCS 1Yr, ITRS and P-o-C/P change Rate to Manual, and type in 25. Click Apply. This allows 25% to populate Review Summary. Change Base to SWF. Click Save. We will update amounts in next steps.

Sample BOR proposal.
(113) Mike the Tiger (LA Board of Regents (BOR))

Done Save

Budget +

F&A

Cost Sharing

Justifications

Versions

Setup

F&A

Calculation rate method

Prevaling ☒ Blended ☐

Scheme

Base Show SWF

Rate Manual Entry

Rate 25.000

Apply

Manual F&A

Source View: Sponsor

Edit Mode

- For ENH and ATLAS, change the Rate to No IDC. Click Apply.

Sample BOR proposal.
(113) Mike the Tiger (LA Board of Regents (BOR))

Done Save

Budget +

F&A

Cost Sharing

Justifications

Versions

Setup

F&A

Calculation rate method

Prevaling ☒ Blended ☐

Scheme

Base Show MTDC

Rate No IDC

Apply

Manual F&A

Source View: Sponsor

Edit Mode

- Click Cost Sharing and then Detail next to F&A to enter F&A amounts from internal BoRSF budget worksheet.

Sample BOR proposal.
(113) Mike the Tiger (LA Board of Regents (BOR))

Done Save

Budget +

F&A

Cost Sharing

Justifications

Versions

Setup

Cost Sharing

Personnel Costs

	PERIOD 1	PERIOD 2	PERIOD 3	TOTAL
Detail Tiger, (113) Mike				
Sponsor	0	0	0	0
PBS	0	0	0	0
LSU	0	0	0	0
Subtotal Personnel:	\$ 0	\$ 0	\$ 0	\$ 0

Non-Personnel Costs

	PERIOD 1	PERIOD 2	PERIOD 3	TOTAL
Detail Other Direct Costs				
Sponsor	75,000	50,000	50,000	175,000
PBS	10,000	10,000	10,000	30,000
LSU	0	0	0	0
Subtotal Non-Personnel:	\$ 85,000	\$ 60,000	\$ 60,000	\$ 205,000

Budget Summary

	PERIOD 1	PERIOD 2	PERIOD 3	TOTAL
Direct Costs:				
Sponsor	\$ 75,000	\$ 50,000	\$ 50,000	\$ 175,000
PBS	\$ 10,000	\$ 10,000	\$ 10,000	\$ 30,000
LSU	\$ 0	\$ 0	\$ 0	\$ 0
F&A:				
Sponsor	\$ 36,000	\$ 24,000	\$ 24,000	\$ 84,000
PBS	\$ 4,800	\$ 4,800	\$ 4,800	\$ 14,400
LSU	\$ 0	\$ 0	\$ 0	\$ 0
Total Project Costs:	\$ 125,800	\$ 88,800	\$ 88,800	\$ 303,400

- Click on Cost Sharing by Build Up. Enter F&A on the applicable Cost line. Enter requested funds under Sponsor and cost sharing funds under the applicable source of cost sharing. These number should match the internal BoRSF spreadsheet. Click Save and Close.

F&A

Show Calculations **Save and Close** Save Close

COST SHARING BY BREAKDOWN **COST SHARING BY BUILD UP** + ADD SOURCE

	PERIOD 1	PERIOD 2	PERIOD 3
SPONSOR [Hide]			
Percent	47.368	40.000	40.000
Cost	45,000	20,000	20,000
Type			
Category			
PBS [Hide]			
Percent	52.632	60.000	60.000
Cost	50,000	30,000	30,000
Type			
Category			
LSU [Hide]			
Percent	0.000	0.000	0.000
Cost	0	0	0
Type			
Category			
Total	100.00% \$ 95,000	100.00% \$ 50,000	100.00% \$ 50,000

Budget – Complete

- Once you have completed your budget, go to Budget tab. Confirm the Budget Summary matches the internal BoRSF budget worksheet and click Complete Button on top right corner.

Budget **Budget Summary [hide]** **Complete Budget**

YEAR/PERIOD	INCREMENT	START	END	TYPE	STATUS	Sponsor (show)	Cost Sharing (show)	Project (hide)
1	1	01-Jun-2021	30-Jun-2022	New*	Proposed	\$ 120,000	\$ 60,000	\$ 85,000
2	2	01-Jul-2022	30-Jun-2023	New*	Proposed	70,000	40,000	60,000
3	3	01-Jul-2023	30-Jun-2024	New*	Proposed	70,000	40,000	60,000
Total:						\$ 260,000	\$ 140,000	\$ 205,000

- Once Budget is complete, Budget will be in View Mode, and you will need to click on Un-Complete Budget to make edits.

Budget **Un-Complete Budget** **View Mode**

Personnel

- The PI will auto populate on this tab.



You must add all investigators that are in #26 of the LSU Questionnaire to the Personnel tab and any other Senior Personnel. This helps ensure that all necessary routing approvals are received.

- To add investigators, type in their name, choose role using the dropdown, begin typing name, and click Save.

- Since effort was not included on the budget, you will enter senior personnel effort on the Personnel tab. Click the lock button next to Person Months.

- Type in the annual effort (requested + cost shared). If the effort varies each year, type in the average. Click Save.
- The Responsible column indicates who is an Investigator per PS-98 for Financial Conflict of Interest. Senior Personnel are automatically checked. All LSU PI and Co-Investigators should be checked. Indicate other responsible investigators by clicking the checkbox by their name. If necessary, add other PS-98 investigators to personnel tab.
- COI column will either have a green check or red question mark.

- If green check mark appears, a Significant Financial Interest (SFI) disclosure has been “Received in GeauxGrants.”
- If red question mark appears, a SFI disclosure has either been “Created; No Disclosure” or there is “No Current Disclosure”. SFI needs to be submitted.
- The Legend describes who is on the Prime and who is on the Subaward. Uncheck any subaward investigators in the Responsible column.

Senior/Key

PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS CALENDAR ACADEMIC SUMMER	CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
1	(114) Mike the Tiger PD/PI * Certifications and Training				<input checked="" type="checkbox"/>	Louisiana State University and A&M College LSUAM Sch of VETM Pathobiological Sciences	0 2 0			
2	Bob Nicholls SubAward PI Certifications and Training				<input type="checkbox"/>	Nicholls State University Nicholls State University	0 0 0			

Non-Key

PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS CALENDAR ACADEMIC SUMMER	CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
1	TBH Graduate Student Certifications and Training				<input type="checkbox"/>	Louisiana State University and A&M College Louisiana State University and A&M College	6 0 0			

Legend:

- Prime
- SubAward - AM200151-subk-01 (Bob Nicholls)

- If Investigator information needs to be updated, click on the individual’s name and enter the information in the profile for this record.
- Check Complete when done. Complete must be unchecked before editing the information.

Internal Uploads & Routing

All documents for OSP review are uploaded here. Follow instructions at the top of the page. You must upload the BoRSF internal budget worksheet and budget justification here.

- **Step 1:** Click Add Institution Forms/Supporting Documentation to upload documents.
- **Step 2:** After completing all previous tabs (checkmarks on left navigation), user must open both LSU Questionnaire and the Review Summary to Complete/Lock these forms.

Current Proposal Status: Pending

Components for Initial Application

Pre-Review Route: [Route Proposal](#) [Submit Pre-Review](#)

FORM/DOCUMENT NAME	EDIT	STATUS	UPLOAD	REMOVE
LSU Questionnaire (Read Only) (Proposal Documentation)		Incomplete		Mandatory
Review Summary (Proposal Documentation)		Incomplete		Mandatory


[Add Institution Forms/Supporting Documents](#)

LSU

REVIEWER SUMMARY PAGE

Lock Form Validate Save

- **Step 3:** To route proposal for review and approvals, click the thumbs up icon by Submit Pre-Review. This step must be completed by the following dates:
 - Department ENH: 10/12/2020
 - ITRS and P-o-C/P: 10/19/2020
 - RCS and RCS 1Yr: 10/26/2020
 - ATLAS: 11/09/2020


Pre-Review Route: Route Proposal ▼ Submit Pre-Review 

- **Step 4:** Click Accepted and then Continue.

Certification Close

I have read and agree to the certifications on the Review Summary, if applicable.

☒ Accepted ☐ Declined

Continue 









- **Step 5:** If units receiving Investigator Credit are not included in the Route, follow the steps below:
 - **Step 5a:** Insert route after Step 12





Make sure to click on insert icon after Step 12. Do not click on Add new Person to Review Path. This button inserts the person at the beginning instead of the end of the route and prevents OSP from being notified of proposal.

Proposal **AM200151 - (L14) Mike the Tiger** "This is a test manual proposal for Dept Admin." (Pending)

[Refresh Route](#)

Route Path - Route Proposal	Add New Person to Review Path	
Step 1	Gold/Purple Assignment	Rebecca Trahan 
	Gold/Purple Assignment	Dana Rene' Tuminello 
	Gold/Purple Assignment	Ryan Russell Greer 
	Gold/Purple Assignment	Tracy Wang 
	Gold/Purple Assignment	Darya Delaune Courville 
Step 12	Investigators/Dept Heads/Deans	Dr. Test the Department Head 2 
	Investigators/Dept Heads/Deans	(L14) Mike the Tiger 
	Investigators/Dept Heads/Deans	Dr. Test the Department Head 1 

Submit  **3**

 **1**

- **Step 5b:** Type Name of Investigator, choose Approval Required and click Add.
Newly added Investigator will be added to the Route and a notification will be sent for his/her review and approval.

Add step

2. Begin typing name here.

Add Cancel

Type Name

☐ Informational Only
☒ Approval Required

- **Step 5c:** Inserted Investigator will appear after Step 12.

Proposal **AM200151 - (L14) Mike the Tiger** "This is a test manual proposal for Dept Admin." (Pending)

[Refresh Route](#)

Route Path - Route Proposal		Add New Person to Review Path	Submit
Step 1	Gold/Purple Assignment	Ryan Russell Greer	
	Gold/Purple Assignment	Darya Delaune Courville	
	Gold/Purple Assignment	Rebecca Trahan	
	Gold/Purple Assignment	Dana Rene' Tuminello	
	Gold/Purple Assignment	Tracy Wang	
Step 12	Investigators/Dept Heads/Deans	Dr. Test the Department Head 2	
	Investigators/Dept Heads/Deans	Dr. Test the Department Head 1	
	Investigators/Dept Heads/Deans	(L14) Mike the Tiger	
Inserted Step	Inserted Step	(L1) Mike the Tiger	

- **Step 6:** Click Submit in top right to route the proposal.