LSU | GeauxGrants

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 routed in GeauxGrants.**

TIP! **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.
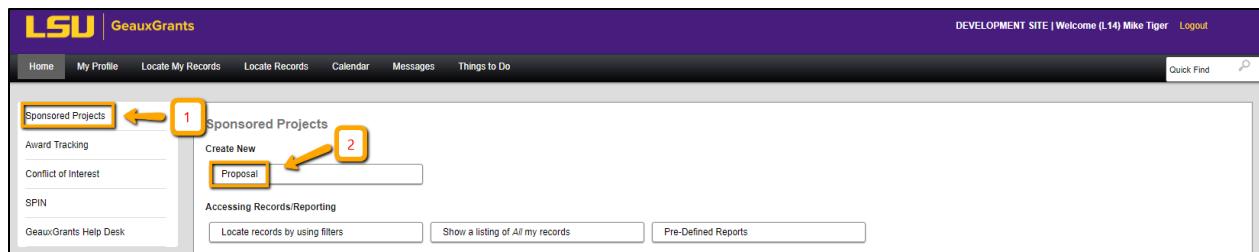
New Proposal Questionnaire

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*   Tiger, (L13) Mike the Change

Step 1: *Create a "New" Proposal or "Copy From Existing"?*   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*   Tiger, (L14) Mike the Change

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

Continue

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

New Proposal Questionnaire   Back

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 1: *Continued*   Setup Proposal Manually   Continue

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

New Proposal Questionnaire   Back

Step 0: *Confirm you intend for the PI of this proposal to be*   Billiot, Gina Larpenter Change

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

Step 2: *Please Select a Proposal Type*   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   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: *Select a Sponsor*   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   Back

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, 2025, 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, 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*   Test Proposal for BORSF
Step 6: *What are the project start and end dates?*   From   01-Jun-2025
                                                                         To   30-Jun-2028

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, 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*   Test Proposal for BORSF
Step 6: *Project Start and End Dates*   01-Jun-2025 to 30-Jun-2028
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

Step 0: *Confirm you intend for the PI of this proposal to be*	Tiger, 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*	Test Proposal for BORSF
Step 6: *Project Start and End Dates*	*01-Jun-2025* to *30-Jun-2026*
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]

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

Record/Institution # equivalent to SPS#

≡ 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   Setup Questions   ❓ [Show] Completed ☐

Setup Questions

GeauxGrants will automatically generate a Proposal/Record/Institution #. GeauxGrants numbering will be AMFYXXXX. For Fiscal Year (FY) 2025, all numbers begin with AM25.

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

TIP! Hover your mouse over ❓ icons to see instructions or definitions.

Proposal Sponsor ❓

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.

Project? ❓

nsored project? ❓

ation

his Submission? ❓
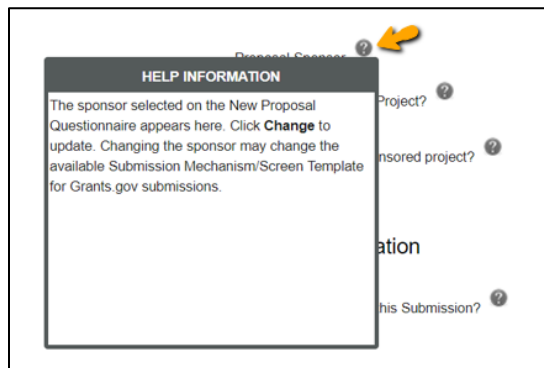
- Read instructions at the top of the page, answer all questions. Click Save at any point to preserve all data entered. Clicking Completed will validate form and will prompt user to save changes by clicking OK.

- Deadline: Enter deadline date as the date you would like OSP to submit your proposal. This should not be the OSP internal deadline. All proposal must be submitted by OSP before 4:30 PM on the following days:
  - Department ENH: 10/24/2024
  - ITRS and P-o-C/P: 10/31/2024
  - RCS and RCS 1Yr: 11/07/2024
  - ATLAS: 11/21/2024

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

  - 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.**

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.**

- For BoRSF, Question #17 "F&A Reduction or Waiver (including sponsor limited rate)" should be answered Yes – Sponsor Published Rate

- For BoRSF Question #18 "Is Tuition Remission allowed per sponsor published guidelines" should be answered No. BoRSF does allow cost sharing of Graduate Assistant Tuition Remission.

- For BoRSF Question #19 "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.

- For BoRSF Question #23 "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.

  - **Step 2**: To enter the Investigator Name or Department, click the pencil icon. For Department, begin typing the Cost Center Number (CC00XXX) or name in Find Department. Once it appears, click on unit name and then click Select.

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

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.

- Click on Period/Dates Tab and update the budget period so that year 1 is 01-Jun-2025 to 30-June-2026. Outyears should run 01-July to 30-Jun. Click Save.

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

- 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 external sources, type at the bottom of the chart. Field is progressive text. Choose from name that appears. Click Add New Source. If source is not found, complete Request to Add New Sponsor form. In Additional Comments to OSP, indicate that this is external cost sharing source for BORSF.

- For institutional cost sharing that will be documented via a journal entry (tuition remission, unrecovered F&A), change Charge to column to Louisiana State University and Short Name of LSU.

Budget – Subawards

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

- 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

 If Subaward Institution is not in GeauxGrants, complete Request to Add Subrecipient form

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

- At minimum you need to enter the Subaward PI's First and Last Name and Department. Click Save.

- Click Add Subaward on Budget tab.

- 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.

- 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

- 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.

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 base to SWF and change rate to Manual, and type in 25. Click Apply. This allows 25% to populate Review Summary. Click Save. We will update amounts in next steps.

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

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

- On Cost Sharing by Breakdown tab, enter 100% for sponsor for each year. Click Save.

	PERIOD 1	PERIOD 2	PERIOD 3
SPONSOR [Hide]			
Percent	100.000	100.000	100.000
Cost	0	0	0
Type			
Category			
PBS [Hide]			

- 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.

	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			
Percent	100.00%	100.00%	100.00%
Total	$ 95,000	$ 50,000	$ 50,000

Budget – Complete

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

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

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. The 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 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.

- 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.

- **Step 3**: To route proposal for review and approvals, click the Submit button next to Rouge Proposal. This step must be completed by the following dates:
  - Department ENH: 10/10/2024
  - ITRS and P-o-C/P: 10/17/2024
  - RCS and RCS 1Yr: 10/24/2024
  - ATLAS: 11/07/2024

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

- **Step 5**: If investigators or units receiving Investigator Credit are not included in the Route, first confirm all senior personnel were included on the Personnel tab. If the Personnel tab is correct all senior personnel should show in route. If a unit is on the allocation table, but not in the route, follow the steps below:

  - **Step 5a**: Insert route after Step 15

  TIP! **Make sure to click on insert icon after Step 15. 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.**

  - **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.

  - **Step 5c**: Inserted Investigator will appear after Step 15.

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