Proposals must be completed and routed seven (7) business days before the deadline for OSP to submit the proposal.

Creating a Simplified Budget

If a sponsor requires the use of their sponsor budget template then a simplified budget may be entered on the Budget Tab in GeauxGrants. **The sponsor's detailed budget template must be attached to the Internal Uploads and Routing tab in GeauxGrants**.

Examples of Manual Proposals with required sponsor budget templates:

- NSF Research.gov
- NASA NSPIRES
- LA Board of Regents Support Fund

When submitting a Grants.gov System-to-System (S2S) Proposal, use these instructions if the budget tab is italicized. Italicized S2S tabs are not included in the Grants.gov application. The sponsor required budget form can be found on the S2S Forms tab or is attached to the proposal per instructions in the Funding Opportunity Announcement.

When submitting all other Grants.gov (S2S) proposals or when the sponsor does not have a required budget template follow Creating a Detailed Budget.

Budget Tips

- The Budget tab will open in a new window. Clicking Done will close just the budget screen and return user to Proposal Development record.

- It is recommended that you enter budget as a whole instead of by each budget period.

- The Budget Summary will summarize the total costs of the entire institution budget.

Budget – Subawards

- If your proposal budget includes subawards, you must add them first. 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

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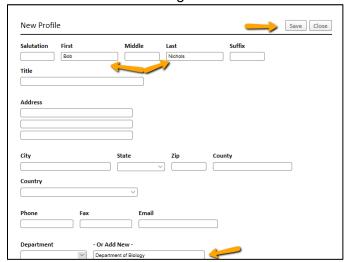**https://lsu.edu/geauxgrants/sponsored_projects/request_new_subrecipient.php**

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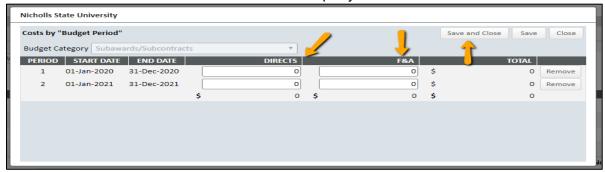

- At minimum you need to enter the Subaward PI's First and Last Name and Department. For Grants.gov applications that require the Senior/Key Person Profile, you will be prompted on the Personnel tab to enter more information. Click Save.
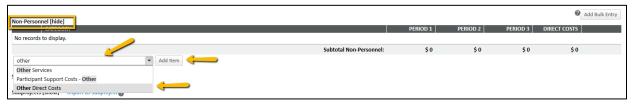
- Click Add Subaward on Budget tab.

- 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.
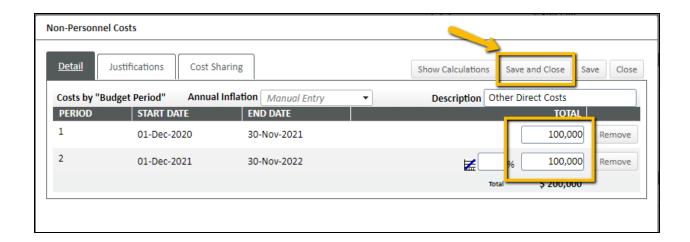

- You will notice the SubAwards (1) tab to the left. Click this and then the SubAward Number link to edit the subaward budget, if needed.

Budget – Non-Personnel

- When a sponsor has a required budget template, 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, Enter total direct costs less any subawards for each year. Click Save and Close.
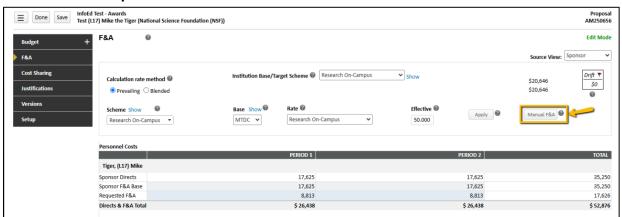
F&A Tab

- The federally negotiated rate for Program Type and Location (on-campus vs. off-campus) of the project will automatically populate. You will need to edit so that the requested F&A matches your internal budget sheet.

F&A instructions using federally negotiated rate

- **Step 1**: Click Manual F&A to edit.

- **Step 2**: Scroll down to the F&A Breakdown section at the bottom. Enter the F&A base each year from your sponsor budget template. Click Save in top right.

F&A instructions using sponsor limited or ORED approved reduced rate

- **Step 1**: Change Rate to Manual, and type in sponsor limited rate. Click Apply and then click Manual F&A. Clicking Apply allows rate to populate on Reviewer Summary.
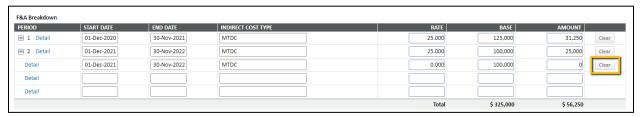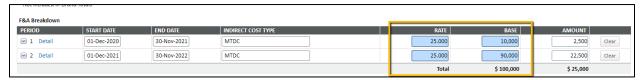

- **Step 2**: Scroll down to the F&A Breakdown section at the bottom. If there are extra lines, click "Clear" to remove.
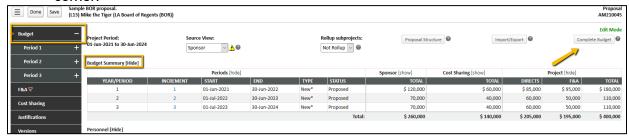
F&A Breakdown

PERIOD	START DATE	END DATE	INDIRECT COST TYPE	RATE	BASE	AMOUNT	
☑ 1 Detail	01-Dec-2020	30-Nov-2021	MTDC	25.000	125,000	31,250	Clear
☑ 2 Detail	01-Dec-2021	30-Nov-2022	MTDC	25.000	100,000	25,000	Clear
Detail	01-Dec-2021	30-Nov-2022	MTDC	0.000	100,000	0	Clear
Detail							
Detail							
			Total		$ 325,000	$ 56,250	

- **Step 3**: Change Rate to sponsor limited rate. Enter the F&A base each year from your sponsor budget template. Click Save in top right.

F&A Breakdown

PERIOD	START DATE	END DATE	INDIRECT COST TYPE	RATE	BASE	AMOUNT	
☑ 1 Detail	01-Dec-2020	30-Nov-2021	MTDC	25.000	10,000	2,500	Clear
☑ 2 Detail	01-Dec-2021	30-Nov-2022	MTDC	25.000	90,000	22,500	Clear
			Total		$ 100,000	$ 25,000	

Budget – Complete

- Once you have completed you budget, go to Budget tab. Confirm the Budget Summary matches the sponsor required 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.
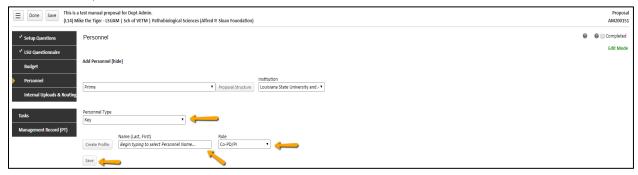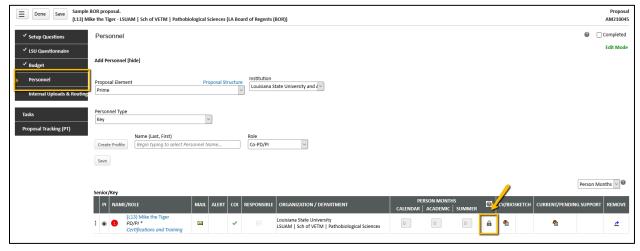
Personnel

- 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 will 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.
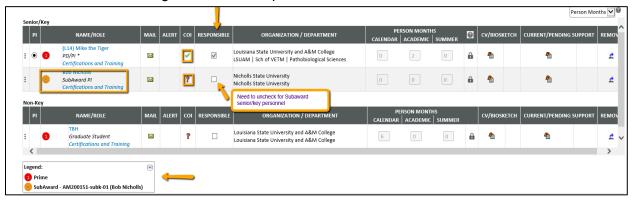

- Since effort was not included on the budget, you will enter senior personnel effort on the Personnel tab. Click the lock button next to Person Months.

- 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.

- 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 sponsor required budget template and budget justification, if applicable, 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 thumbs up icon by Submit Pre-Review.

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

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

  - **Step 5a**: Insert route after Step 16

TIP! **Make sure to click on insert icon after Step 16. 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 16. Click Submit in top right to route the proposal.

- After proposal is routed, list of required approvals will appear at the bottom of the screen.

- The current status is shown at the top of the documents.

- Click the Scroll to see the Route History.

Current Proposal Status: Routing

Components for Initial Application

Current Submission

FORM/DOCUMENT NAME	VIEW	STATUS	UPLOAD	REMOVE
LSU Questionnaire (Read Only) (Proposal Documentation)	📄	Completed	📄	Mandatory
Review Summary (Proposal Documentation)	📄	Completed	📄	Mandatory

Add Institution Forms/Supporting Documents

Active Routing Progress

Open Full

AM250363 - Test (L17) Mike the Tiger "Test for Route"

Submitted by Josh Steven Boudreaux on behalf of Test (L17) Mike the Tiger

Route Name	Route Type	Step Number/Name	Who	Notified	Notification Type	Decision	Insert	Remove
Route Proposal	Pre-Review	Step 1 - Gold/Purple Assignment	Tracy Wang	02-Dec-2024 11:34:51 AM	Information Only	Informed -		
Route Proposal	Pre-Review		Dana Tuminello	02-Dec-2024 11:34:52 AM	Information Only	Informed -		
Route Proposal	Pre-Review		Darya Delaune Courville	02-Dec-2024 11:34:52 AM	Information Only	Informed -		
Route Proposal	Pre-Review		Ryan Russell Greer	02-Dec-2024 11:34:52 AM	Information Only	Informed -		
Route Proposal	Pre-Review		Rebecca Trahan	02-Dec-2024 11:34:53 AM	Information Only	Informed -		
Route Proposal	Pre-Review	Step 16 - Investigators/Dept Heads/Deans	Test (L17) Mike the Tiger	02-Dec-2024 11:34:54 AM	Approval Required		Insert After	