

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 FastLane or 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.

Setup Questions	Setup Questions
LSU Questionnaire	
Budget	<p>This proposal is broken down into several sections based upon what the sponsor and institution requires. Once each section is complete, please indicate so by clicking the Completed checkbox in the upper right corner of each section.</p> <p>The proposal is being handled as a Grants.gov submission. If this is not the case, please contact your departmental grant administrator or the Office of Sponsored Programs at osp@lsu.edu.</p>
Personnel	
SF424	<p>If this is a modification request, please click 'Show' at the top of the page and select the Modification Request Template.</p>
Internal Uploads & Routing	<p>If this is an Other Miscellaneous Agreement, please click 'Show' at the top of the page and select the Other Miscellaneous Agreement Template.</p>
S2S Forms	
Finalize	Submission Mechanism/Form Information

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.

Non-Personnel [hide]

CATEGORY	PERIOD 1	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



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.

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

Type Subaward Institution Name

Click if Subaward PI's name is not in GeauxGrants

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

- 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

Non-Personnel [hide]

No records to display.

other

Other Services

Participant Support Costs - Other

Other Direct Costs

Add Item

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

- On the popup, Enter total direct costs less any subawards for each year. Click Save and Close.

Non-Personnel Costs

Detail Justifications Cost Sharing

Show Calculations Save and Close Save Close

Costs by "Budget Period" Annual Inflation Manual Entry Description Other Direct Costs

PERIOD	START DATE	END DATE	TOTAL
1	01-Dec-2020	30-Nov-2021	100,000
2	01-Dec-2021	30-Nov-2022	100,000
Total			\$ 200,000

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 to 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.

Done Save This is a test for Creating Manual Proposals Training. (L13) Mike the Tiger (Albemarle Corporation) Proposal AM210041

Budget SubAwards (1) F&A Cost Sharing Justifications Versions Setup

F&A

Calculation rate method Prevaling Blended

Institution Base/Target Scheme Research On-Campus

Base MTDC Rate Research On-Campus

Apply

Manual F&A

Personnel Costs

	PERIOD 1	PERIOD 2	TOTAL
Tiger, (L13) Mike			

- **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 Breakdown							
PERIOD	START DATE	END DATE	INDIRECT COST TYPE	RATE	BASE	AMOUNT	
1 Detail	01-Dec-2020	30-Nov-2021	MTDC	48,000	118,800	57,024	Clear
2 Detail	01-Dec-2021	30-Nov-2022	MTDC	48,000	93,800	45,024	Clear
Total					\$ 212,600	\$ 102,048	

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.

This is a test for Creating Manual Proposals Training. (L13) Mike the Tiger (Albemarle Corporation) Proposal AM210041 [Edit Mode](#)

Budget SubAwards (1) F&A Cost Sharing Justifications Versions Setup

F&A Source View: Sponsor

Calculation rate method: ☒ Prevailing ☐ Blended

Institution Base/Target Scheme: Research On-Campus [Show](#)

Scheme:

Base: MTDC [Show](#)

Rate: Manual Entry [Rate @ 25,000](#)

Click Apply and then click Manual F&A

Apply [Manual F&A](#)

Personnel Costs

	PERIOD 1	PERIOD 2	TOTAL
Tiger, (L13) Mike			

- **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 your budget, go to Budget tab. Confirm the Budget Summary matches the sponsor required budget worksheet and click Complete Button on top right corner.

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

Project Period: 01-Jun-2021 to 30-Jun-2024

Source View: Sponsor

Rollup subprojects: Not Rollup

Proposal Structure

Import/Export

Complete Budget

Budget Summary [hide]

YEAR/PERIOD	INCREMENT	START	END	TYPE	STATUS	Sponsor [show]	Cost Sharing [show]	Project [hide]		
						TOTAL	TOTAL	DIRECTS	F&A	TOTAL
1	1	01-Jun-2021	30-Jun-2022	New*	Proposed	\$ 120,000	\$ 60,000	\$ 85,000	\$ 95,000	\$ 180,000
2	2	01-Jul-2022	30-Jun-2023	New*	Proposed	70,000	40,000	60,000	50,000	110,000
3	3	01-Jul-2023	30-Jun-2024	New*	Proposed	70,000	40,000	60,000	50,000	110,000
Total:						\$ 260,000	\$ 140,000	\$ 205,000	\$ 195,000	\$ 400,000

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

This is a test Grants.gov for other federal sponsors for Dept Admin trainings.
(L14) Mike the Tiger (Office of Science/Department of Energy)

Project Period: 01-Jan-2020 to 31-Dec-2021

Source View: Sponsor

Rollup subprojects: Not Rollup

Proposal Structure

Import/Export

Build PDF

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 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.

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

Personnel

Add Personnel [hide]

Prime

Proposal Structure

Institution
Louisiana State University and

Personnel Type
Key

Name (Last, First)
Begin typing to select Personnel Name...

Role
Co-PI/PI

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.

Current Proposal Status: Pending

Components for Initial Application

Pre-Review Route: 


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 REVIEWER SUMMARY PAGE

- **Step 3:** To route proposal for review and approvals, click the thumbs up icon by Submit Pre-Review.

Pre-Review Route: 

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

Certification

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

☒ Accepted ☐ Declined

- **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

Annotations: Arrow 1 points to the 'Add New Person to Review Path' button for Step 12. Arrow 3 points to the 'Submit' button.

- **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.

Type Name

☐ Informational Only

☒ Approval Required

Add Cancel

- **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	
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

Submit

Annotation: A box highlights the 'Inserted Step' row at the bottom of the route.

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