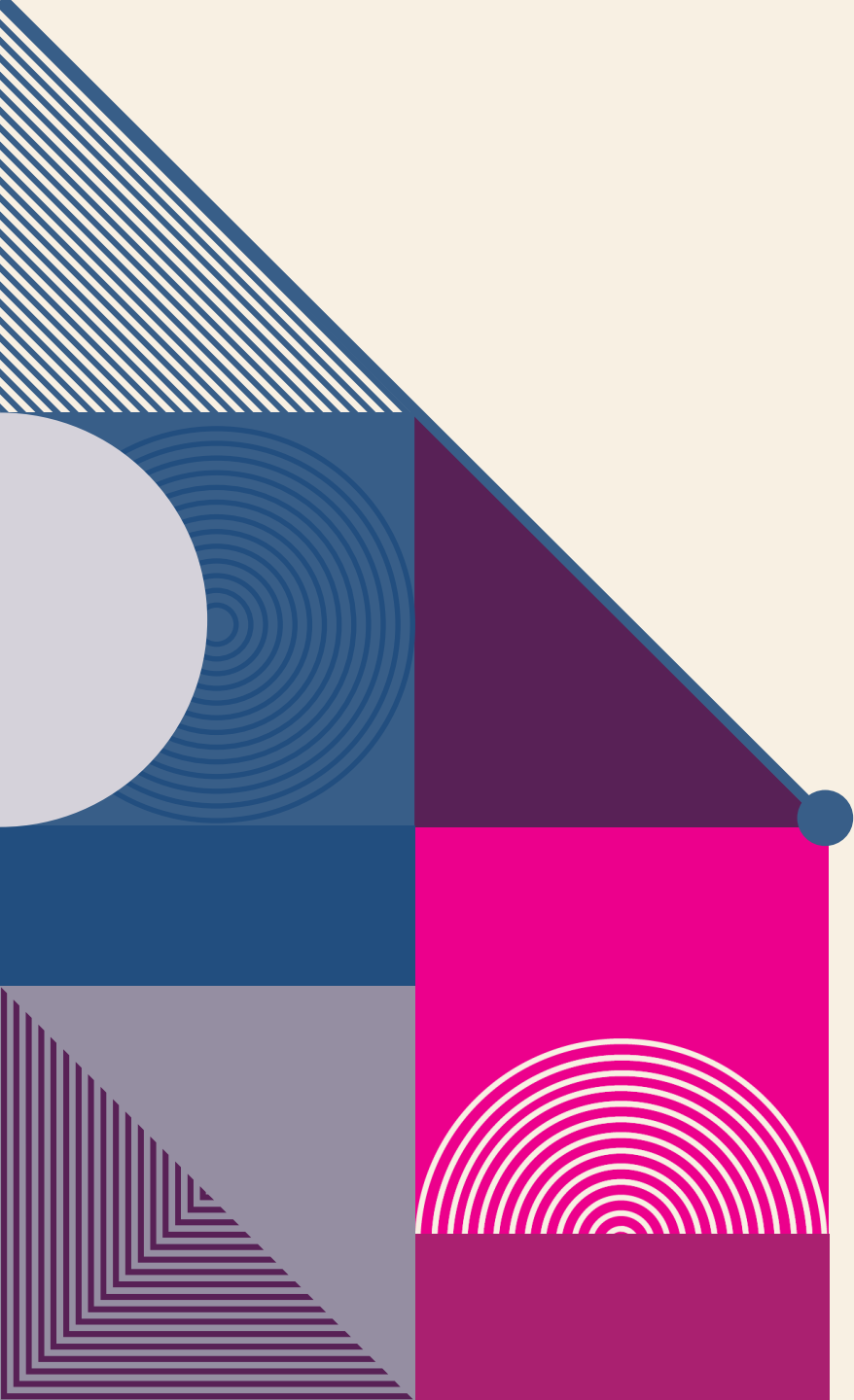




# KUALI TIPS AND TRICKS

**AUGUST 28, 2025**  
**LEC 632**



# AGENDA

Introduction to Kual

New Proposal

Follow Up Proposal

Final Tips & Takeaways



# INTRODUCTION TO KUALI

# WHAT IS KUALI?

- Kuali is an Electronic Research Administration (ERA) system.
- LSUHSC uses Kuali for Institutional Review Board (IRB), Institutional Animal Care and Use Committee (IACUC), Institutional Biosafety Committee (IBC), Conflicts of Interest (COI), Negotiations (ex. Clinical Trial Agreements, Data Transfer & Use Agreements), and Pre- and Post-Award Grant Functions.
- LSUHSC has used Kuali since September/October 2021.
- This presentation will focus on the Kuali Pre- and Post-Award Grant Functions.



# NEW PROPOSALS IN KUALI

# LOGIN PAGE FOR KUALI

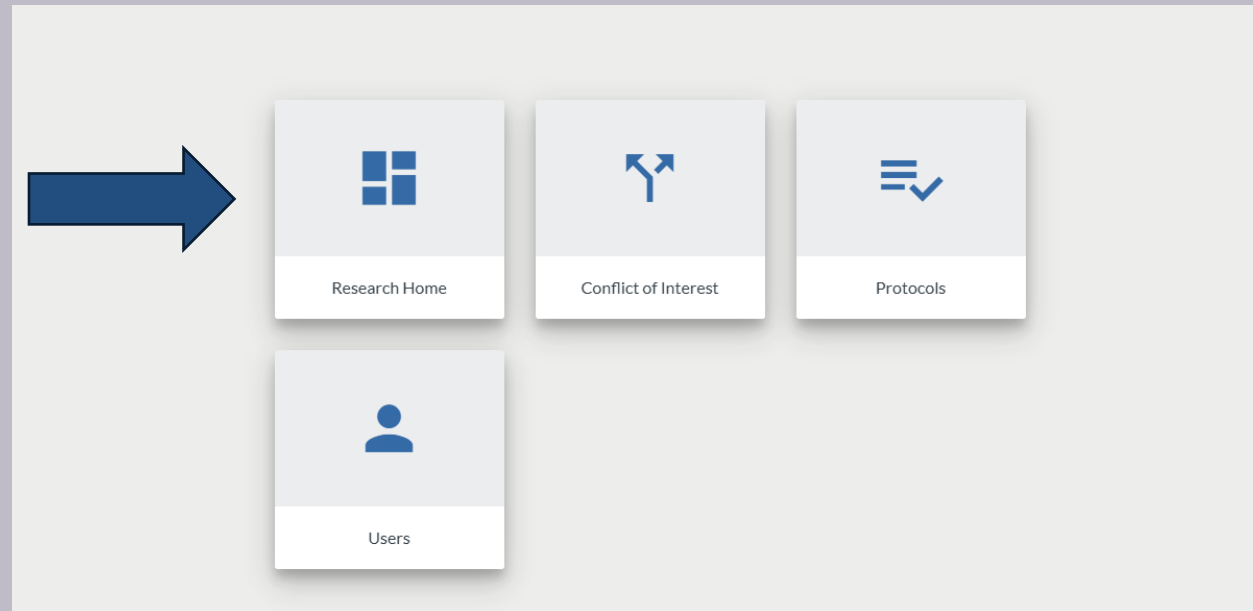
kuali



Welcome to Kuali  
Click below to get started

Sign In

Initial login page should look like this.

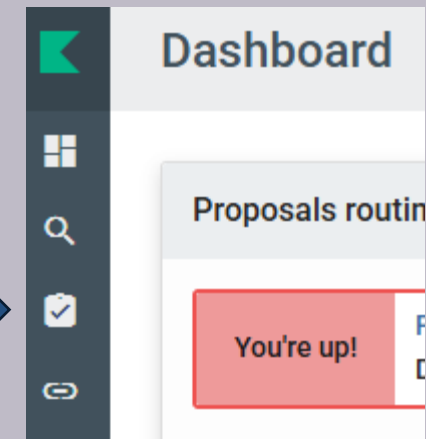


Click the "Research Home"  
block.

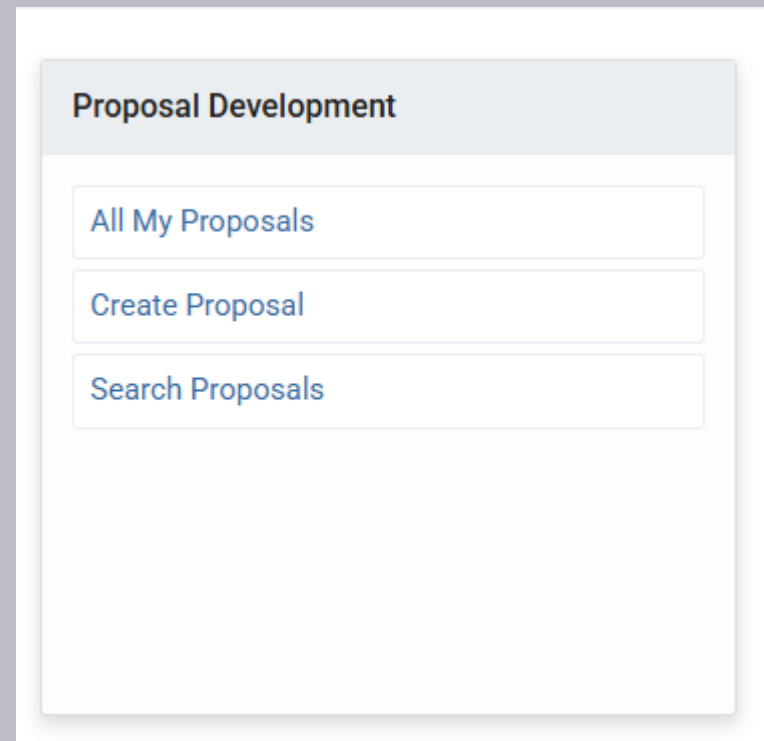
This should take you to your dashboard. There will be several items there:

- Proposals routing to me
- Proposals not routing
- Negotiations
- Proposal workload assignments

Click the clipboard with a check to move to the next page.



This should take you to your “Common Tasks” page that will have all the functions of Kuali that are available to you. To create a “New Proposal”, locate the Proposal Development box and click the “Create Proposal” link.



# CREATE PROPOSAL

Kuali Research

## Create Proposal

\* indicates required fields



|                           |   |  |            |
|---------------------------|---|--|------------|
| Proposal Type: *          | Initial Submission - New Project  |  | ▼          |
| Lead Unit: *              | NO1103750 - B/S-Multidisciplinary   |  | ▼          |
| Activity Type: *          | Research  |  | ▼          |
| Project Dates: *          | 01/01/2026  | to   | 12/31/2026 |
| Project Title: *          | Creation of a Training Plan for Research Administrators at the LSU Health Sciences Center New Orleans |  |            |
| Sponsor: *                | 100606  | NIH - NIGMS (National Institute of General Medical Sciences) 🔍 |            |
| Principal Investigator: * | 205130885   | Carly Pigg 🔍   |            |

- Since we are creating a “New Proposal”, choose “Initial Submission-New Project.”
- We will look at the choice of “Follow-Up Submission” later.
- The choice for “Initial Submission-Legacy Project” is for proposals that started outside of Kuali, and this is the first time Kuali is being used for that project (i.e., yellow routing packet).

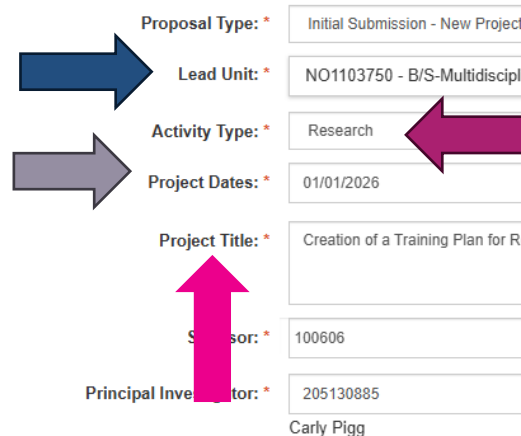
# CREATE PROPOSAL

- Choose the Lead Unit. This will be your department, or if you have access to multiple departments, you will have multiple items to choose from.
- Choose Activity Type. **This is important because it will determine your Indirect Cost rate in your budget portion of the proposal.** Choices are Research, Clinical Trials, Instruction, and Other Sponsored Activity.
- Enter Project Dates. This is the entire project not just the budget period.
- Enter the title of the project exactly how it will be submitted to the sponsor. **This needs to be the final version of the title. It will have to be rerouted if changed.**

Kuali Research

## Create Proposal

\* indicates required fields



|                           |   |  |            |
|---------------------------|---|--|------------|
| Proposal Type: *          | Initial Submission - New Project  |  | ▼          |
| Lead Unit: *              | NO1103750 - B/S-Multidisciplinary   |  | ▼          |
| Activity Type: *          | Research  |  | ▼          |
| Project Dates: *          | 01/01/2026  | to   | 12/31/2026 |
| Project Title: *          | Creation of a Training Plan for Research Administrators at the LSU Health Sciences Center New Orleans |  |            |
| Sponsor: *                | 100606  | NIH - NIGMS (National Institute of General Medical Sciences) 🔍 |            |
| Principal Investigator: * | 205130885   | Carly Pigg 🔍   |            |

# CREATE PROPOSAL

- The last two options on this page are:
  - Sponsor
  - Principal Investigator
- Both have search functions to use. Under Sponsor Lookup, type the Sponsor's Name with an **asterisk** on each side. For Person Lookup, you only need to type the last name in to the search box.

Lookup

### Sponsor Lookup

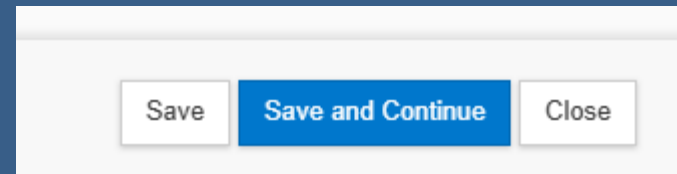
|                            |   |
|----------------------------|---|
| Sponsor Code:              | <input type="text"/>                                  |
| Sponsor Name:              | <input type="text"/>                                  |
| Acronym:                   | <input type="text"/>                                  |
| Sponsor Type Code:         | <input type="text"/> <input type="button" value="Q"/> |
| DUN And Bradstreet Number: | <input type="text"/>                                  |
| DUNS Plus Four Number:     | <input type="text"/>                                  |
| DODAC Number:              | <input type="text"/>                                  |
| CAGE Number:               | <input type="text"/>                                  |
| Postal Code:               | <input type="text"/>                                  |
| State:                     | <input type="text"/>                                  |
| Country Code:              | <input type="text"/>                                  |

Lookup

### KcPerson Lookup

|                |  |
|----------------|--|
| KcPerson Id:   | <input type="text"/>   |
| Last Name:     | <input type="text"/>   |
| First Name:    | <input type="text"/>   |
| User Name:     | <input type="text"/>   |
| Email Address: | <input type="text"/>   |
| Office Phone:  | <input type="text"/>   |
| Active:        | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |
| Home Unit:     | <input type="text"/>   |
| Campus Code:   | <input type="text"/>   |

# SAVING YOUR WORK



- **"Save and Continue"** is for saving the proposal and moving to the next page.
- **"Save"** is to save your work on the particular page you are on.
- **"Close"** will close the proposal and take you back to your dashboard. Make sure you save it and once it moves to the dashboard, this proposal will be listed under your **"Proposals Not Routing"** box.

|          |   |
|----------|---|
| Proposal | Proposal #4044 – PI: Pigg, Carly – Sponsor: NIH - NIGMS (National Institute of General Medical Sciences) – Title: Cr...<br>Due date: None   Last action: 8/22/2025 11:31 AM |
|----------|---|

- Until you submit the proposal, you can consistently Save and Close the proposal to come back to it at a later time.

# PROPOSAL DETAILS

- All items from the previous page will automatically populate here.
- This is where you will add a "Prime Sponsor Code" if we will be considered a subaward upon funding.
- Nothing needs to be done with the "Keywords" box at this time.

## Proposal Details

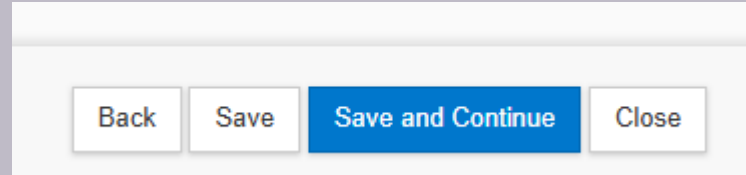
\* indicates required fields

Document was successfully saved.

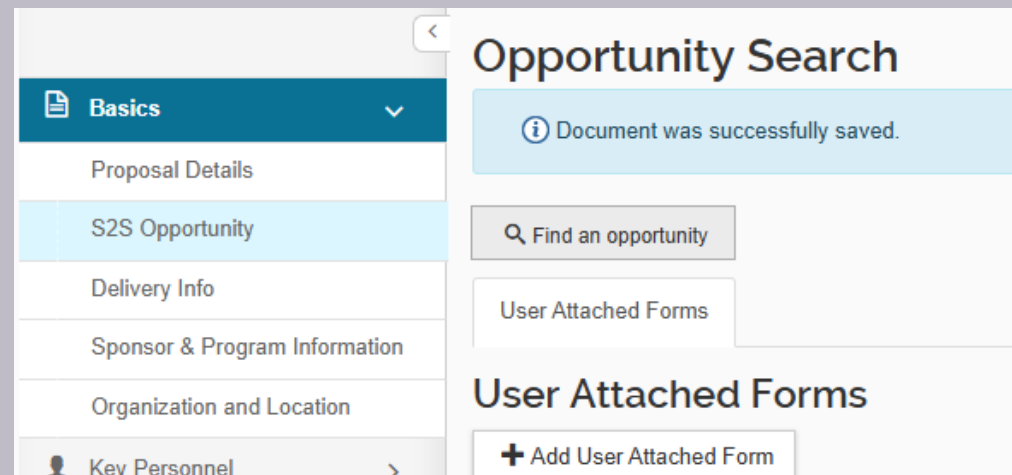
|                     |   |    |  |   |
|---------------------|---|----|--|---|
| Proposal Type: *    | Initial Submission - New Project  |    |  | ▼ |
| Lead Unit:          | NO1103750 - B/S-Multidisciplinary   |    |  |   |
| Activity Type: *    | Research  |    |  | ▼ |
| Project Dates: *    | 01/01/2026  | to | 12/31/2026   |   |
| Project Title: *    | Creation of a Training Plan for Research Administrators at the LSU Health Sciences Center New Orleans |    |  |   |
| Sponsor: *          | 100606  |    | NIH - NIGMS (National Institute of General Medical Sciences) | Q |
| Prime Sponsor Code: |   |    |  | Q |
| Keywords:           | Nothing selected  |    |  |   |



# OPPORTUNITY SEARCH



On this page you will have an added choice of a Back button to go to a previous page, which will remain for the rest of the proposal.




- System to System will populate the sponsor's application portal with your proposal once it is approved internally in our system
- This page currently has no functionality within our workflow. You will just click "Save and Continue" to move to the next page.
- This is supposed to be coming at a later date.

# DELIVERY INFO

**Delivery Info**

Document was successfully saved. X

 Submission By:  ▼ 🔍

Submission Type:  ▼ 🔍

Submission Account ID:

Submission Name & Address: [Change](#) [Clear](#)

Number of copies:


Submission description:

- This is where you describe how the proposal will be submitted once approved internally.
- For most of your proposals, your "Submission By" choice will be **ORS.**
- Sometimes you have the option to submit as the "Department/PI." This is in the event the sponsor wants a submission via email, which some foundations and professional organizations do.
- Choose **"LSU Foundation"** if the applicant must be a **501C3.**

# DELIVERY INFO

**Delivery Info**


📘 Document was successfully saved. ✕

 Submission By:  ▼ 🔍

Submission Type:  ▼ 🔍

Submission Account ID:

Submission Name & Address: [Change](#) [Clear](#)

 Number of copies:

Submission description:

- **"Submission Type"** is how it is being submitted.
- Examples are ASSIST, Grants.Gov, and LOGAN.
- You need to answer both "Submission By" and "Submission Type."
- **"Submission Description"** is where you can list a brief description of what it is you are trying to accomplish with this Kuali proposal.

# SPONSOR AND PROGRAM INFORMATION

Sponsor & Program Information

① Document was successfully saved. X

Sponsor Deadline Type: Receipt

Sponsor deadline: 09/08/2025 hh:mm

Notice of Opportunity: Unsolicited

Opportunity ID: 1457X

Opportunity Title: Creation of Research Training for University Personnel

Subawards: ☐ Yes, this proposal includes subaward(s)

Sponsor Proposal ID:

NSF Science Code: select

Anticipated Award Type: select

Agency Routing Identifier:

Prev Grants.Gov Tracking ID:

- Fill in the following:
  - **Sponsor Deadline Type**: Normally choose “Receipt” but if it must be mailed, “Postmark” may be your choice here.
  - **Sponsor Deadline**: Date it is due to the sponsor. If you have the exact time it is due, it is helpful to add that as well.

# SPONSOR AND PROGRAM INFORMATION

Sponsor & Program Information

Document was successfully saved.

Sponsor Deadline Type: Receipt

Sponsor deadline: 09/08/2025 hh:mm

Notice of Opportunity: Unsolicited

Opportunity ID: 1457X

Opportunity Title: Creation of Research Training for University Personnel

Subawards: ☐ Yes, this proposal includes subaward(s)

Sponsor Proposal ID:

NSF Science Code: select

Anticipated Award Type: select

Agency Routing Identifier:

Prev Grants.Gov Tracking ID:

- Fill in the following:

- **Notice of Opportunity:** Federal Solicitation, Unsolicited, Verbal Request for Proposal, SBIR Solicitation, STTR Solicitation, Non-Federal Solicitation, Internal
- **Opportunity ID and Opportunity Title:** This information will come from the first page of the funding opportunity.
- **Anticipated Award Type:** Choose whatever you expect to receive if funded

# SPONSOR AND PROGRAM INFORMATION

## Sponsor & Program Information

Document was successfully saved.

X

|                              |   |       |
|------------------------------|---|-------|
| Sponsor Deadline Type:       | Receipt   |       |
| Sponsor deadline:            | 09/08/2025  | hh:mm |
| Notice of Opportunity:       | Federal Solicitation  |       |
| Opportunity ID:              | 1457X   |       |
| Opportunity Title:           | Creation of Research Training for University Personnel                      |       |
| Subawards:                   | <input checked="" type="checkbox"/> Yes, this proposal includes subaward(s) |       |
| Sponsor Proposal ID:         |   |       |
| NSF Science Code:            | select  | Q     |
| Anticipated Award Type:      | select  |       |
| Agency Routing Identifier:   |   |       |
| Prev Grants.Gov Tracking ID: |   |       |



If you will have one or more subawards for the proposal, make sure to check the **Subawards** button.

# ORGANIZATIONS AND LOCATIONS

Organizations & Locations

Document was successfully saved.

Applicant Organization Performing Organization Performance Site Locations Other Organizations


Applicant Organization

Details

|                   |   |
|-------------------|---|
| Organization Name | Louisiana State University Health Sciences Center |
| Address Line 1    | c/o Office of Research Services                   |
| Address Line 2    | 433 Bolivar Street, 2nd Floor                     |
| Address Line 3    |   |
| City              | New Orleans                                       |
| State             | LA  |
| Postal Code       | 70112   |

+ Add Congressional District

LA-002



- **Applicant Organization** and **Performing Organization** will be populated already.
- If you have a subaward and we are the Prime Entity, click the **Other Organizations** tab. Follow the same process as we did on the first tab to add the sponsor information.
- Once added, you can use the following to enter the Congressional District: <https://www.house.gov/representatives/find-your-representative>

# ORGANIZATIONS AND LOCATIONS

Other Organizations

[Add Organization](#)

Organization Name:

Address Line 1:

Address Line 2:

Address Line 3:

City:

State:

Postal Code:

Country Code:

[+ Add Congressional District](#)

Add Line

State:

District Number:

[Cancel](#) [Add](#)

Once you click the +Add Congressional District Button, a secondary box will open. Notate the state and three digits for the district number. Click "add" once complete.

# KEY PERSONNEL

Key Personnel

Document was successfully saved.

Search for and add key personnel

Add Personnel

Notify All

Carly Pigg (PI/Contact) (Certification Incomplete)

Project Status: Update Not Required Annual Disclosure Status: Approved Project Disposition: None

Notify Carly Pigg

Mickey Pigg (Co-Investigator)

Project Status: Annual Disclosure Status:

Notify Mickey Pigg

- When you get to the **Key Personnel** tab, the only person listed will be the PI. You will have to click Add Personnel for each LSUHSC Employee that will participate in the grant regardless of their role.

Add Personnel

Search for ☒ Employee ☐ Non Employee

Last Name Pigg

First Name Mickey

User Name

Email Address user@domain.com

Office Phone

Home Unit

Campus Code

Continue... Cancel

**\*You will not add "TBA" personnel here. They must be hired/employed LSUHSC employees. "TBA" will be added into the Budget.\***

# KEY PERSONNEL

- **ALL** PIs on a project need to have the Proposal Person Certification completed. You can send a notification to that person to fill it out or you can fill it out for each person.

▼ Carty Pigg (PI/Contact) (Certification Incomplete)

Project Status: Update Not Required Annual Disclosure Status: Approved Project Disposition: None

Details

Organization

Extended Details

Degrees

Unit Details

Person Training Details

Proposal Person Certification

Details



## Proposal Person Certification

[Clear All Answers](#)

### Certification Regarding Lobbying

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1.) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

[①](#)

☐ I certify

(2.) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL "Disclosure Form to Report Lobbying," in accordance with its instructions.

[①](#)

☐ I certify

(3.) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

[①](#)

☐ I certify

### Certification Regarding Significant Financial Interest Disclosure

As described in Chancellor's Memorandum #35, each Investigator is required to disclose any significant financial interest of the Investigator that would reasonably appear to be directly and significantly affected by the research or educational activities funded, or proposed for funding. Regardless of the above minimum requirement, a faculty or staff member, in his or her own best interest, may choose to disclose any other financial or related interest that could present an actual conflict of interest or be perceived to present conflict of interest. Disclosure is a key factor in protecting one's reputation and career from potentially embarrassing or harmful allegations of misconduct.

Each person who has significant financial interests requiring disclosure must complete a CM35 Significant Financial Interests Disclosure Form, attach all required supporting documentation, including a copy of any relevant PM-11 disclosure, and place the materials in a sealed envelope addressed to the Office of Research Services and clearly marked "CONFIDENTIAL Significant Financial Interests Disclosure", and identified with the name of the person making the disclosure, the name of the sponsor, and the project name.

[①](#)

☐ I certify

### NIH Assurances

As Principal Investigator and/or Fellow on this NIH Application I assure the following:

(4.) To the best of my knowledge the information submitted within this application is true, complete, and accurate.

# QUESTIONNAIRE-PROPOSAL PURPOSE

- There are three tabs to answer on this page: **Proposal Purpose**, **Proposal Questions**, and **Proposal Type(s)**.

**Proposal Purpose (Incomplete)**

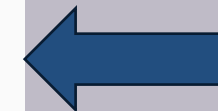
What is the PURPOSE of this project? Select all that apply. ⓘ

- ☐ Conference
- ☐ Equipment Acquisition
- ☐ Fellowship
- ☐ Information Disclosure/Exchange
- ☐ New Construction
- ☐ Public Service
- ☐ Renovations/Alterations
- ☐ Research: Clinical (Drug or Device)
- ☐ Research: Clinical (Other)
- ☐ Research: Non-Clinical
- ☐ Training/Instruction
- ☐ Travel
- ☐ Other

If you selected "Other," please enter description in the text box. If "Other" is not selected type "N/A". ⓘ

Click the box for the choice that matches the overall purpose of the proposal.

If there is nothing to enter for the "Other" choice, enter **N/A** into the text box that is there.



# QUESTIONNAIRE-PROPOSAL QUESTIONS

## Proposal Questions (Incomplete)

Is the PI eligible for Continuous Submission? ⓘ

- ☐ Yes  
☐ No  
☐ N/A

Publications: Have articles resulting from DHHS funding been entered into NLM database? ⓘ

- ☐ Yes  
☐ No  
☐ N/A

Is there a non-standard F&A Policy? ⓘ

- ☐ Yes  
☐ No

Is the funding coming from a foreign source? ⓘ

- ☐ Yes  
☐ No

Is the IRB Fee included in the budget? ⓘ

- ☐ Yes  
☐ No  
☐ N/A

Do you have adequate space, facilities, and resources available for this project? ⓘ

- ☐ Yes  
☐ No

Does the proposal include IP or Patentable information? ⓘ

- ☐ Yes  
☐ No

Does this proposal include a Clinical Trial? ⓘ

- ☐ Yes  
☐ No

- Choose the best choice for each question.
- The questions with "N/A" as an option, "N/A" is the most likely choice for a brand-new proposal.
- If you choose "Yes" for the question on the F&A Policy, this will require an **Indirect Cost Waiver**.

# QUESTIONNAIRE-PROPOSAL TYPE(S)

Proposal Purpose ✓ Proposal Questions ✓ Proposal Type(s) ✓

**Proposal Type(s) (Complete)**

Please identify the Initial Submission - New Project type being routed (select all that apply): ⓘ

☐ Pre-Application/NOI/LOI

☒ Grant Application - Initial

☐ Contract Based Research - Clinical Trial

☐ Contract Based Research - Other

☐ Other

If you selected "Other," please enter description in the text box. If "Other" is not selected type "N/A". ⓘ

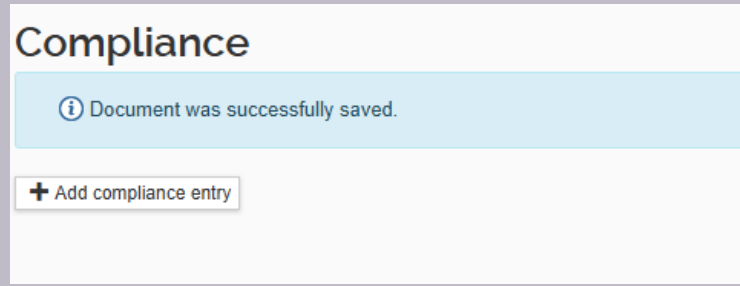
N/A

For Initial Submissions, these will be your choices for **Proposal Type(s)**. These choices will change for Follow-Up Submissions, which we will address later.

Once you successfully complete all three tabs, the checkmarks will turn green, and you are able to move on in the proposal.

Proposal Purpose ✓ Proposal Questions ✓ Proposal Type(s) ✓

# COMPLIANCE



Compliance

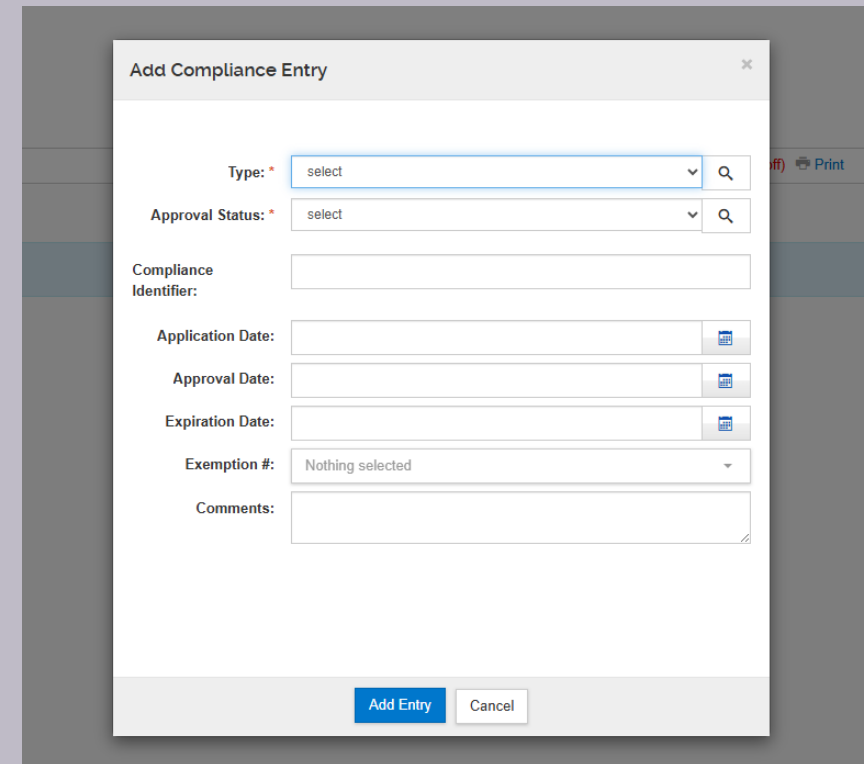
*i* Document was successfully saved.

+ Add compliance entry

This is where you will enter all your IRB, IACUC, and IBC information. If they are pending, as is usual with a new submission, you can mark it as "Pending."

Complete the information you have on the screen. If you need to mark something as "Pending," you can do that on the **Approval Status** line.

If your project will not require any of these, you can click "Save and Continue" without adding anything.



Add Compliance Entry

Type: \*

Approval Status: \*

Compliance Identifier:

Application Date:

Approval Date:

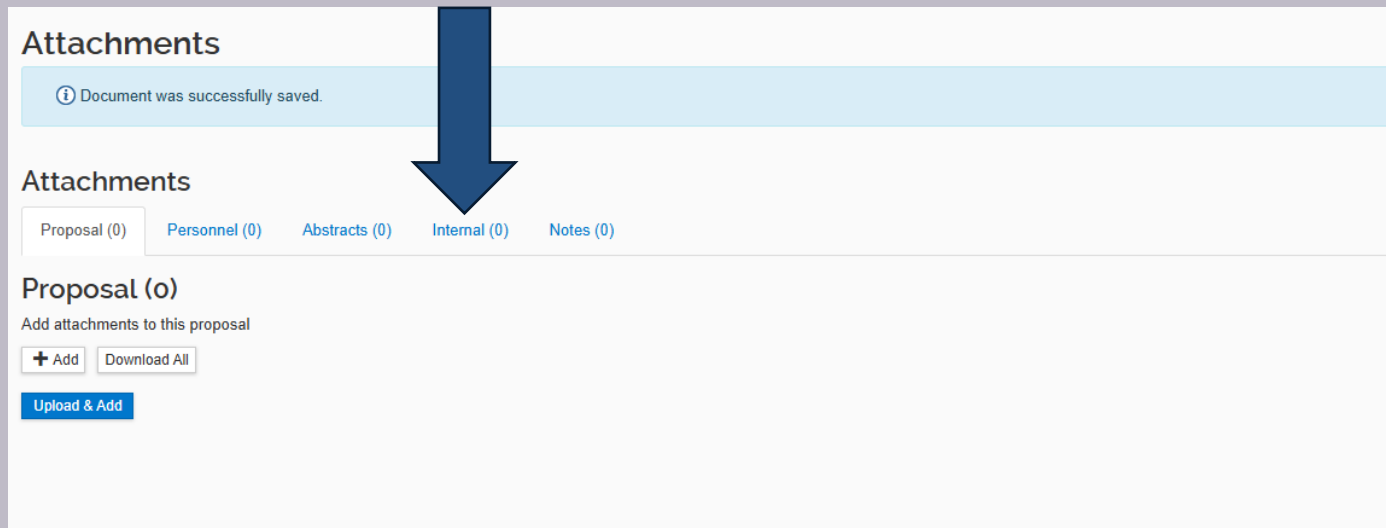
Expiration Date:

Exemption #:

Comments:

# ATTACHMENTS


Upload all required documents that need to be reviewed/signed on this tab. Normal required documents include Abstract, ORS Budget Worksheet, Budget Justification, Letter to Establish a Consortium (if applicable), and Data and Management Sharing Plan (if research proposal for NIH). They should be uploaded to the "Internal" tab.



Click the +Add button for each item that needs to be uploaded.

# ATTACHMENTS

For any documents uploaded that require signature, mark the “Status” as **Incomplete**. This will provide guidance that the document needs to be pulled out for signature, not just reviewed.



**Attachments**

Proposal (0) Personnel (0) Abstracts (0) Internal (4) Notes (0)

Internal (4)

+ Add Download All

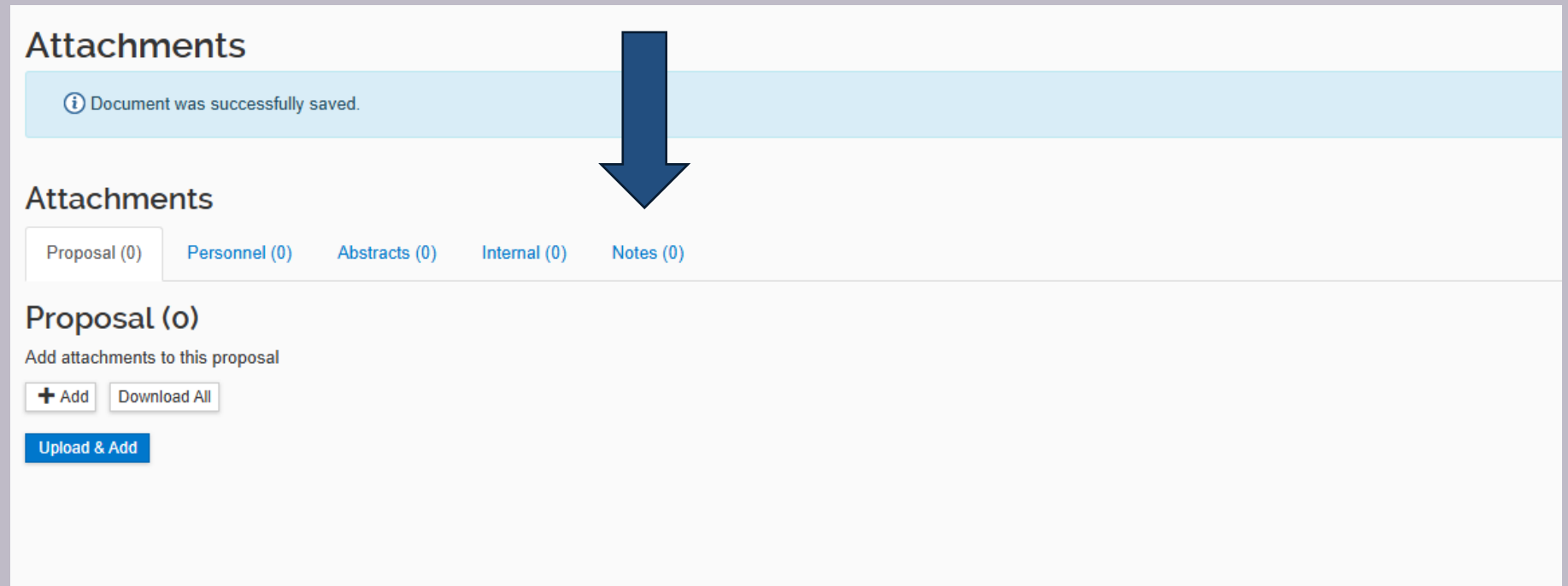
Upload & Add

Set All Statuses select

| File  | Type *   | Status *   | Description                                     | Uploaded By | Posted Timestamp    | Actions  |
|---|--|------------|---|-------------|---------------------|--|
| 1 <a href="#">SampleConsortiumLetter Revised UNO.doc</a>    | Letter of Intent to Establish Consortium Agreement | Incomplete | Pigg Letter to Establish a Consortium Agreement | Pigg, Carly | 08/26/2025 10:21 AM | <a href="#">Details</a> <a href="#">view/edit rights</a> <a href="#">trash</a> |
| 2 <a href="#">Budget Worksheet Macy Foundation.xlsx</a>     | Other Document                                     | Complete   | Pigg Budget Worksheet                           | Pigg, Carly | 08/26/2025 10:20 AM | <a href="#">Details</a> <a href="#">view/edit rights</a> <a href="#">trash</a> |
| 3 <a href="#">Macy Foundation Budget Justification.docx</a> | Budget Justification                               | Complete   | Pigg Budget Justification                       | Pigg, Carly | 08/26/2025 10:20 AM | <a href="#">Details</a> <a href="#">view/edit rights</a> <a href="#">trash</a> |
| 4 <a href="#">Abstract.docx</a>                             | Abstract   | Complete   | Pigg Abstract                                   | Pigg, Carly | 08/26/2025 10:19 AM | <a href="#">Details</a> <a href="#">view/edit rights</a> <a href="#">trash</a> |

# ATTACHMENTS

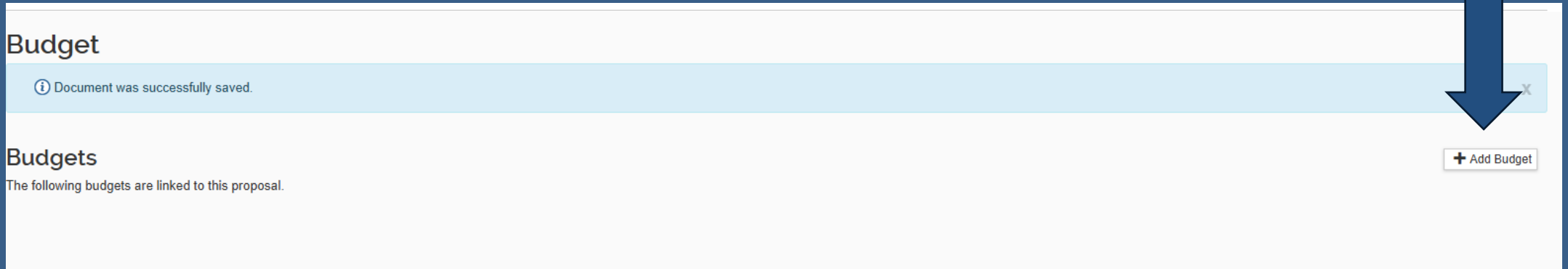
If there is any information you need to provide to the Office of Research Services, use the “Notes” tab to provide that information. This can be the number from the Negotiations module to confirm the agreement has been reviewed, a note about using “Total Direct Costs”, etc.



The screenshot shows a web interface for managing attachments. At the top, a light blue banner displays the message "Document was successfully saved." with an information icon. Below this, a large blue arrow points down to the "Notes (0)" tab. The "Attachments" section features five tabs: "Proposal (0)", "Personnel (0)", "Abstracts (0)", "Internal (0)", and "Notes (0)". The "Proposal (0)" tab is currently selected, showing the heading "Proposal (0)" and the instruction "Add attachments to this proposal". Below the instruction are three buttons: a "+ Add" button, a "Download All" button, and a blue "Upload & Add" button.

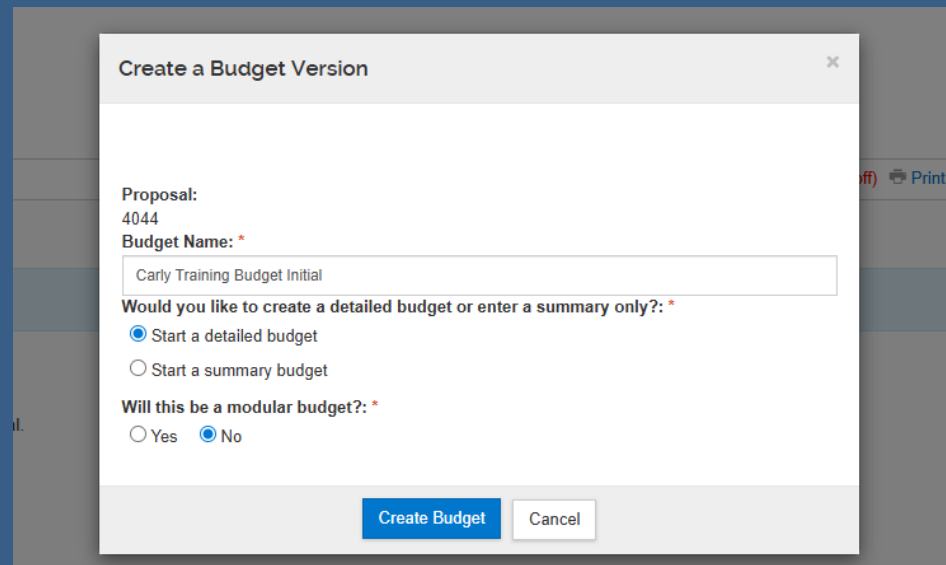
None of the other tabs on this page are needed.

# BUDGET



The screenshot shows a web interface for managing budgets. At the top, there's a header 'Budget'. Below it, a light blue banner contains the message 'Document was successfully saved.' with an information icon on the left and a close 'x' icon on the right. A large blue arrow points down from the top right corner towards the '+ Add Budget' button. Below the banner, the section is titled 'Budgets' with the subtext 'The following budgets are linked to this proposal.' In the top right corner of this section, there is a button labeled '+ Add Budget'.

This is where you will enter all the budget information for the proposal. Click the +Add Budget button on the top right corner. You can add as many budgets as you need but can only have one as the submission budget for each proposal.



The screenshot shows a 'Create a Budget Version' dialog box. It contains the following fields and options:

- Proposal:** 4044
- Budget Name: \*** (text input field containing 'Carly Training Budget Initial')
- Would you like to create a detailed budget or enter a summary only?: \***
  - ☒ Start a detailed budget
  - ☐ Start a summary budget
- Will this be a modular budget?: \***
  - ☐ Yes
  - ☒ No

At the bottom of the dialog are two buttons: 'Create Budget' (in blue) and 'Cancel' (in white).

- Enter a name for your budget. Name it something that helps you to remember which budget version you are creating.
- Choose "Detailed" or "Summary" budget. You will most likely choose "Detailed."
- Select Yes or No if this will be a **Modular Budget.** Remember, you can only choose this for NIH budgets that are \$250,000 or less in direct costs per year.

# BUDGET

## Budgets

[+ Add Budget](#)

The following budgets are linked to this proposal.

| Name  | Version | Direct Cost | F&A  | Total | Start      | End        | Status     | Comments | Actions |
|---|---------|-------------|------|-------|------------|------------|------------|----------|---------|
| <a href="#">Carly Training Budget Initial</a> | 1       | 0.00        | 0.00 | 0.00  | 01/01/2026 | 12/31/2026 | Incomplete |          | Action▼ |

Once the budget is created, the initial page will look like this. Click the hyperlink (title you gave your budget) to begin entering the budget information.

You will enter information on the following tabs under the Budget:

1. Personnel Costs
2. Non-Personnel Costs
3. Subawards (if applicable)
4. Program Income (if applicable)

« Return to proposal

Periods & Totals

Rates

**Personnel Costs** ▼

Project Personnel

Assign Personnel to Periods

Non-Personnel Costs

Subawards

Project Income

✓ Modular

Budget Notes

Budget Summary

# BUDGET-PERSONNEL COSTS

## Project Personnel

+ Add Personnel

Sync from Proposal

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

| Person                    | Job Code        | Appointment Type | Base Salary | Actions             |
|---------------------------|-----------------|------------------|-------------|---------------------|
| From Proposal Development |                 |                  |             |                     |
| Carly Pigg (PI)           | DEFAULT (AA000) | 12M DURATION     | 0.00        | <div>Details🗑</div> |
| Mickey Pigg (COI)         | DEFAULT (AA000) | 12M DURATION     | 0.00        | <div>Details🗑</div> |

There are two tabs under Personnel Costs: Project Personnel and Assign Personnel to Periods. Anyone you added on the “Key Personnel” tab, will be populated here. This is the tab you will add their base salary. You will also add an TBA personnel here.

Click the “Details” button for each person.

You will add the “Salary Anniversary Date,” which is a copy of the “Salary Effective Date.”

Also enter the current “Base Salary” and click “Save Changes.”

**Edit Personnel**

Carly Pigg

[Details](#) [Salary by Period](#)

**Details**

Role: PI/Contact

Job Code: AA000

Job Title: DEFAULT

Appointment Type: 12M DURATION

Salary Effective Date: 01/01/2026

Salary Anniversary Date: 01/01/2026

Base Salary: 75,000.00

[Save Changes](#) [Cancel](#)


# BUDGET-PERSONNEL COSTS

**Project Personnel**

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

[+ Add Personnel](#) [Sync from Proposal](#)

| Person                    | Job Code        | Appointment Type | Base Salary | Actions                                    |
|---------------------------|-----------------|------------------|-------------|--|
| From Proposal Development |                 |                  |             |  |
| Carly Pigg (PI)           | DEFAULT (AA000) | 12M DURATION     | 75,000.00   | <a href="#">Details</a> <a href="#">🗑️</a> |
| Mickey Pigg (COI)         | DEFAULT (AA000) | 12M DURATION     | 80,000.00   | <a href="#">Details</a> <a href="#">🗑️</a> |



Once you add the base salary for everyone that is populated, you need to add your TBA employees. These will continue to only be people that will be employed by LSUHSC. Click the +Add Personnel button.


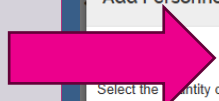
**Add Personnel**

Search for \* To Be Named

Select the quantity of each 'to be named' person category to be returned to your budget.

| Person Category      | Quantity                       |
|----------------------|--------------------------------|
| Computer Programmer  | <input type="text" value="0"/> |
| Data Entry Assistant | <input type="text" value="0"/> |
| Data Manager         | <input type="text" value="0"/> |
| Project Director     | <input type="text" value="0"/> |
| Research Associate   | <input type="text" value="0"/> |
| TBA Research         | <input type="text" value="1"/> |

[Add TBN Personnel to Budget](#) [Cancel](#)



Under "Search for" click **To Be Named**. The "Person Category" and "Quantity" will populate.

Enter the number of people for each "Person Category" and click the **Add TBN Personnel to Budget** button.

# BUDGET-PERSONNEL COSTS

**Project Personnel** + Add Personnel Sync from Proposal

Personnel added to the proposal are shown below. Review, configure, and add additional personnel to the budget.

| Person                           | Job Code        | Appointment Type | Base Salary | Actions                            |
|----------------------------------|-----------------|------------------|-------------|------------------------------------|
| <b>From Proposal Development</b> |                 |                  |             |                                    |
| Carly Pigg (PI)                  | DEFAULT (AA000) | 12M DURATION     | 75,000.00   | <span>Details</span> <span></span> |
| Mickey Pigg (COI)                | DEFAULT (AA000) | 12M DURATION     | 80,000.00   | <span>Details</span> <span></span> |
| <b>Other Personnel</b>           |                 |                  |             |                                    |
| TBA Research - 1                 | DEFAULT (AA000) | 12M DURATION     | 65,000.00   | <span>Details</span> <span></span> |

We now have the TBA Personnel added, and the information will calculate into the budget total. Follow the same directions for adding the estimated base salary to the line.

Click "Save and Continue" to move to the **Assign Personnel to Periods** tab. You will need to add each person you have populated on the previous tab to add their intended effort to the project.

**Assign Personnel to Periods**

Assign personnel to one or all periods and configure efforts and charges.

Period 1

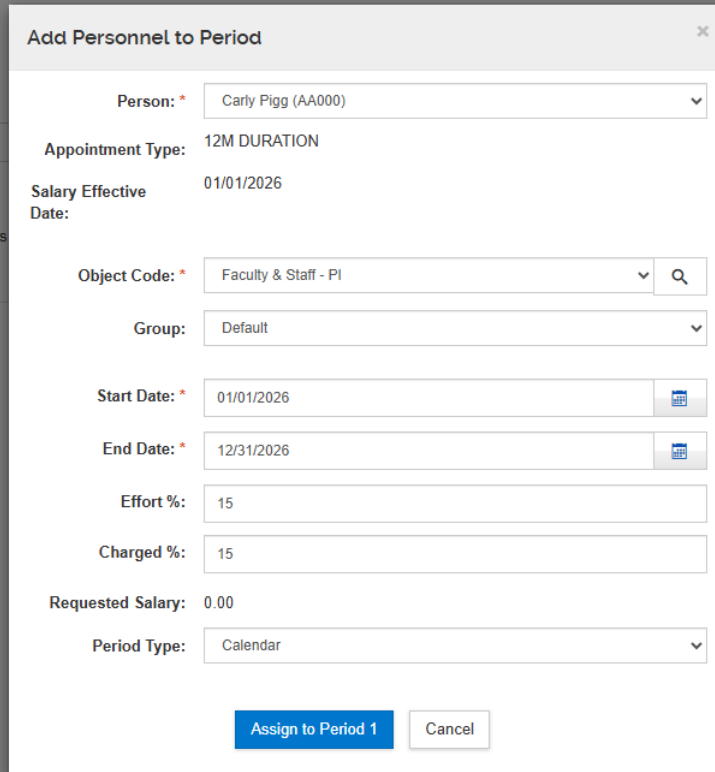
**Period 1**

Calculate Current Period Assign Personnel...

# BUDGET-PERSONNEL COSTS

Complete the steps to add each person to the budget. In this case we have three people, so I would complete this three times.

Choose the person you want to add with the "Person" line. "Appointment Type" and "Salary Effective Date" will already be populated for you.



The screenshot shows a dialog box titled "Add Personnel to Period" with the following fields and values:

- Person:** Carly Pigg (AA000)
- Appointment Type:** 12M DURATION
- Salary Effective Date:** 01/01/2026
- Object Code:** Faculty & Staff - PI
- Group:** Default
- Start Date:** 01/01/2026
- End Date:** 12/31/2026
- Effort %:** 15
- Charged %:** 15
- Requested Salary:** 0.00
- Period Type:** Calendar

At the bottom of the dialog are two buttons: "Assign to Period 1" and "Cancel".

For **Object Code**, it's important that you choose the correct option. This will determine what Fringe Benefit rate is populated for each person.

The "Start and End Dates" will be for the first budget period. If the project is only for one year, the dates will be both the budget period and project period. The dates will be populated for you based on what you entered in the beginning of the proposal.

You will enter the "Effort %" and "Charged %." "Effort %" is total effort on the project and "Charged %" is how much of the total effort you are charging to the grant.

# BUDGET-PERSONNEL COSTS

**Assign Personnel to Periods**  
Assign personnel to one or all periods and configure efforts and charges.

Period 1

Calculate Current Period Assign Personnel...

| Person                                    | Start      | End        | Effort | Charged | Period Type | Requested Salary | Calculated Fringe | Actions                                     |
|---|------------|------------|--------|---------|-------------|------------------|-------------------|---|
| <b>Faculty &amp; Staff - Investigator</b> |            |            |        |         |             |                  |                   |   |
| Mickey Pigg                               | 01/01/2026 | 12/31/2026 | 10.00  | 5.00    | Calendar    | 4,000.00         | 1,520.00          | <a href="#">Details &amp; Rates</a> Details |
| <b>Faculty &amp; Staff - PI</b>           |            |            |        |         |             |                  |                   |   |
| Carly Pigg                                | 01/01/2026 | 12/31/2026 | 15.00  | 15.00   | Calendar    | 11,250.00        | 4,275.00          | <a href="#">Details &amp; Rates</a> Details |
| <b>Project Support Staff</b>              |            |            |        |         |             |                  |                   |   |
| TBA Research - 1                          | 01/01/2026 | 12/31/2026 | 25.00  | 25.00   | Calendar    | 16,250.00        | 6,175.00          | <a href="#">Details &amp; Rates</a> Details |

All the people are entered. You can click the blue hyperlink “Details & Rates” to make sure everything is correct.

**Details & Rates**

General Rates

**General**

Budget Category: Senior Personnel

Unrecovered F&A: 0.00

Cost Sharing: 4,000.00

Notes:

Group Description:

# of Persons: 0

**Inflation Rates**

| Description              | Start Date | Institution Rate | Applicable Rate |
|--------------------------|------------|------------------|-----------------|
| Faculty & Staff Salaries | 07/01/2025 | 3.00             | 3.00            |
| Faculty & Staff Salaries | 07/01/2026 | 3.00             | 3.00            |

Apply Inflation: ☒

Submit cost sharing: ☒

On Campus: ☒

Save Changes Apply To Later Periods Cancel

**Details & Rates**

General Rates

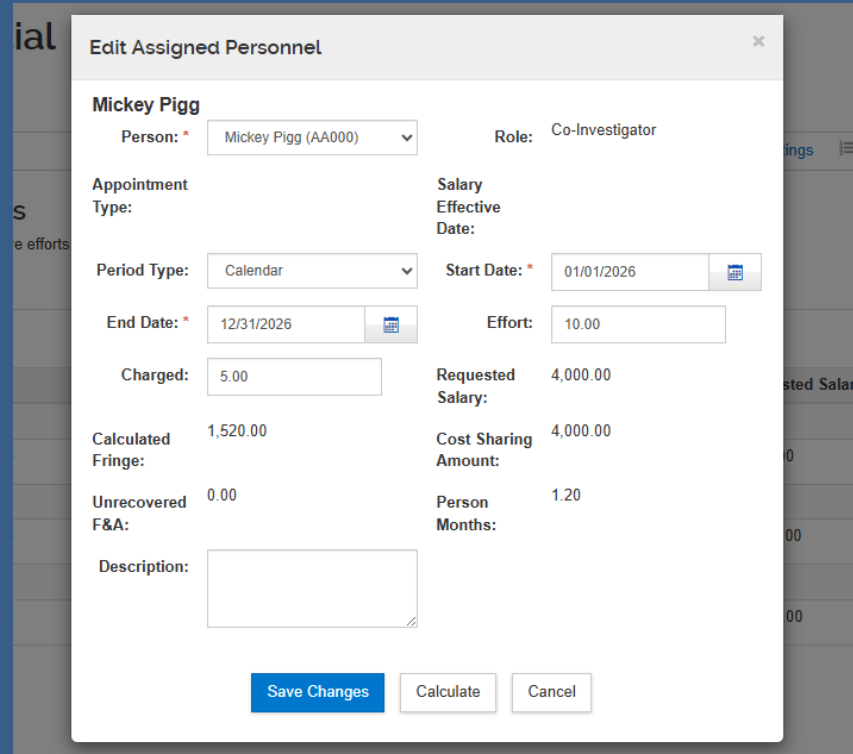
**Rates**

| Class             | Type            | Rate Cost | Rate Cost Sharing | Apply Rate?                         |
|-------------------|-----------------|-----------|-------------------|-------------------------------------|
| Employee Benefits | Faculty & Staff | 1,520.00  | 1,520.00          | <input checked="" type="checkbox"/> |
| MTDC              | MTDC            | 2,760.00  | 2,760.00          | <input checked="" type="checkbox"/> |

Save Changes Apply To Later Periods Cancel

You can use these boxes to assist with determining inflation on projects with multiple years. If you don't want to apply inflation and keep the salary charged the same each year, uncheck the “Apply Inflation” box.

# BUDGET-PERSONNEL COSTS



The screenshot shows a software window titled "Edit Assigned Personnel" with a close button (X) in the top right corner. The window contains the following fields and values:

- Mickey Pigg** (Section Header)
- Person:** \* Mickey Pigg (AA000) (Dropdown menu)
- Role:** Co-Investigator
- Appointment Type:** (Empty field)
- Salary Effective Date:** (Empty field)
- Period Type:** Calendar (Dropdown menu)
- Start Date:** \* 01/01/2026 (Date picker)
- End Date:** \* 12/31/2026 (Date picker)
- Effort:** 10.00 (Text input)
- Charged:** 5.00 (Text input)
- Requested Salary:** 4,000.00
- Cost Sharing Amount:** 4,000.00
- Calculated Fringe:** 1,520.00
- Unrecovered F&A:** 0.00
- Person Months:** 1.20
- Description:** (Text area)

At the bottom of the window are three buttons: "Save Changes" (blue), "Calculate", and "Cancel".

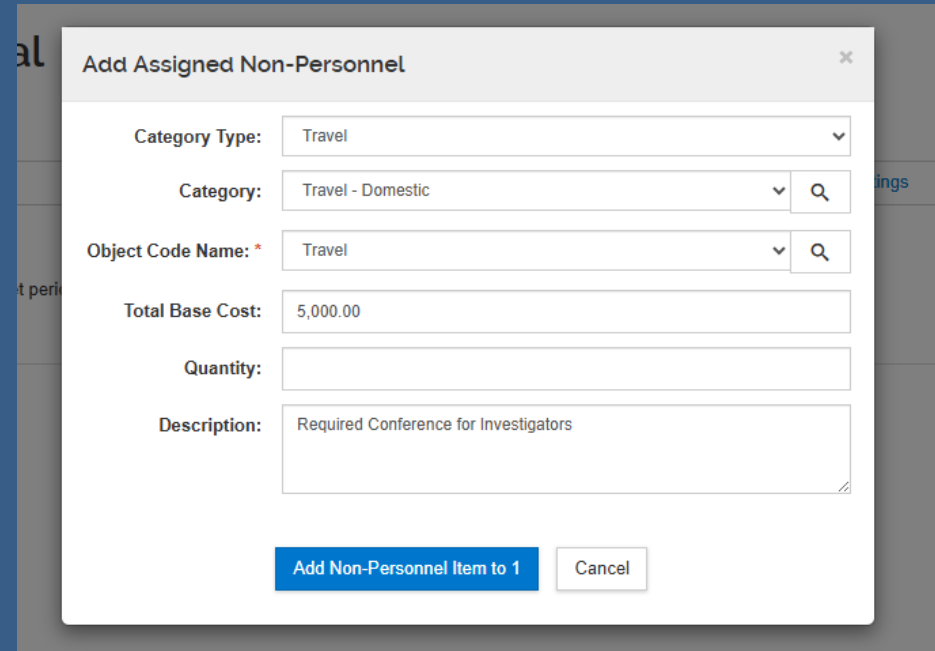
I have also created a cost share because I am not charging the total effort to the project. We will have to go through and confirm the cost share budget is correct before we can mark the budget as complete.

**\*Do not create a cost share unless it is mandatory or if it is because of the salary cap\***

# BUDGET-NON-PERSONNEL COSTS

You will add non-personnel items the same way as you added personnel to the period of performance. Click the “Assign Non-Personnel” button and a series of drop-down menus will appear. I usually add a description of the non-personnel item for reference. Its not required.

Assign Non-Personnel...



The screenshot shows a dialog box titled "Add Assigned Non-Personnel" with a close button (X) in the top right corner. The dialog contains the following fields:

- Category Type:** A dropdown menu with "Travel" selected.
- Category:** A dropdown menu with "Travel - Domestic" selected, accompanied by a search icon (Q).
- Object Code Name: \*** A dropdown menu with "Travel" selected, accompanied by a search icon (Q).
- Total Base Cost:** A text input field containing "5,000.00".
- Quantity:** An empty text input field.
- Description:** A text input field containing "Required Conference for Investigators".

At the bottom of the dialog, there are two buttons: "Add Non-Personnel Item to 1" (highlighted in blue) and "Cancel".

# BUDGET-SUBAWARDS

You will add the costs for the subawards under Non-Personnel Costs. There are several steps to enter the information, and you must split costs between multiple lines if your first-year budget crosses the \$25,000 cap. Here are my subaward totals for each year.

|  |       |  |    |  |  |  |           |           |           |           |           |
|--|-------|--|----|--|--|--|-----------|-----------|-----------|-----------|-----------|
|  |       |  |    |  |  |  | \$0       | \$0       | \$0       | \$0       | \$0       |
| CONSORTIUM DIRECT COSTS                              |       |  |    |  |  |  | \$0       | \$0       | \$0       | \$0       | \$0       |
| SUBTOTAL DIRECT COSTS                                |       |  |    |  |  |  | \$141,498 | \$113,862 | \$116,254 | \$118,756 | \$490,371 |
| CONSORTIUM FACILITIES AND ADMINISTRATION (F&A) COSTS |       |  |    |  |  |  | \$0       | \$0       | \$0       | \$0       | \$0       |
| TOTAL DIRECT COSTS                                   |       |  |    |  |  |  | \$141,498 | \$113,862 | \$116,254 | \$118,756 | \$490,371 |
| INDIRECT F&A COSTS                                   | Rate: |  | 0% |  |  |  | \$0       | \$0       | \$0       | \$0       | \$0       |
| TOTAL PROJECT COSTS                                  |       |  |    |  |  |  | \$141,498 | \$113,862 | \$116,254 | \$118,756 | \$490,371 |
| TTDC BASE <sup>1</sup>                               |       |  |    |  |  |  | 120,558   | 92,314    | 94,128    | 95,998    | 0         |
| TTDC for Subcontract calculations                    |       |  |    |  |  |  |           |           |           |           |           |

**Add Assigned Non-Personnel**

Category Type: Other Direct

Category: Subcontracts

Object Code Name: Consortium Direct Costs - Subject to F&A

Total Base Cost: 25,000.00

Quantity:

Description: First \$25,000 of the Subaward

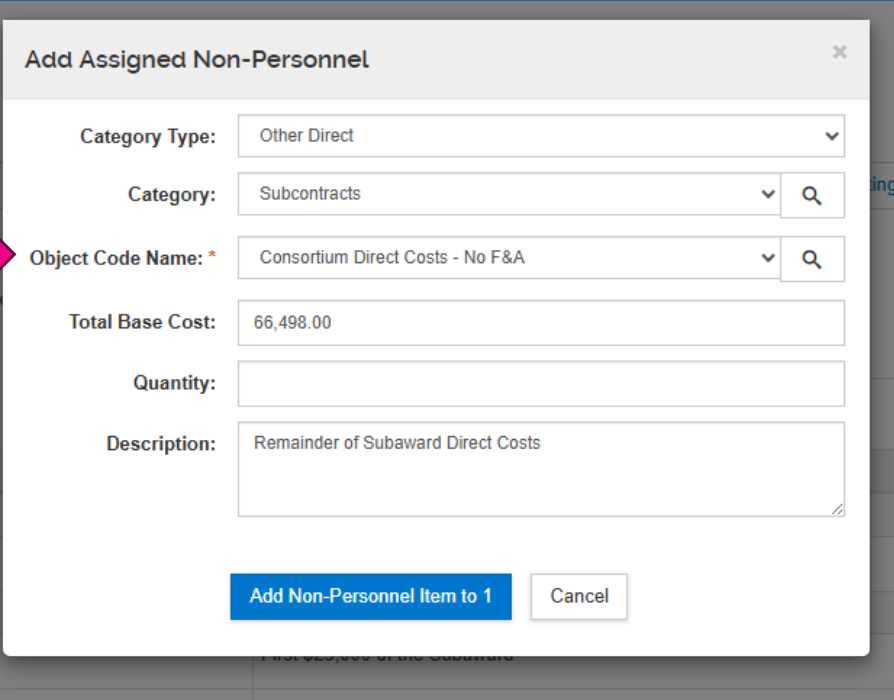

Add Non-Personnel Item to 1 Cancel

We are going to enter several lines in until we get to our Total Project Costs of \$141,498.

The initial line is only for \$25,000 so that the budget calculates the indirect rate against that number.

# BUDGET-SUBAWARDS

The second line is the remainder of our direct costs on the subaward that WILL NOT be subject to F&A. The third and final line is all the indirect costs for the subaward, which is also not subject to our calculation of indirect costs. All three lines should get us back to \$141,198.



**Add Assigned Non-Personnel**

Category Type: Other Direct

Category: Subcontracts

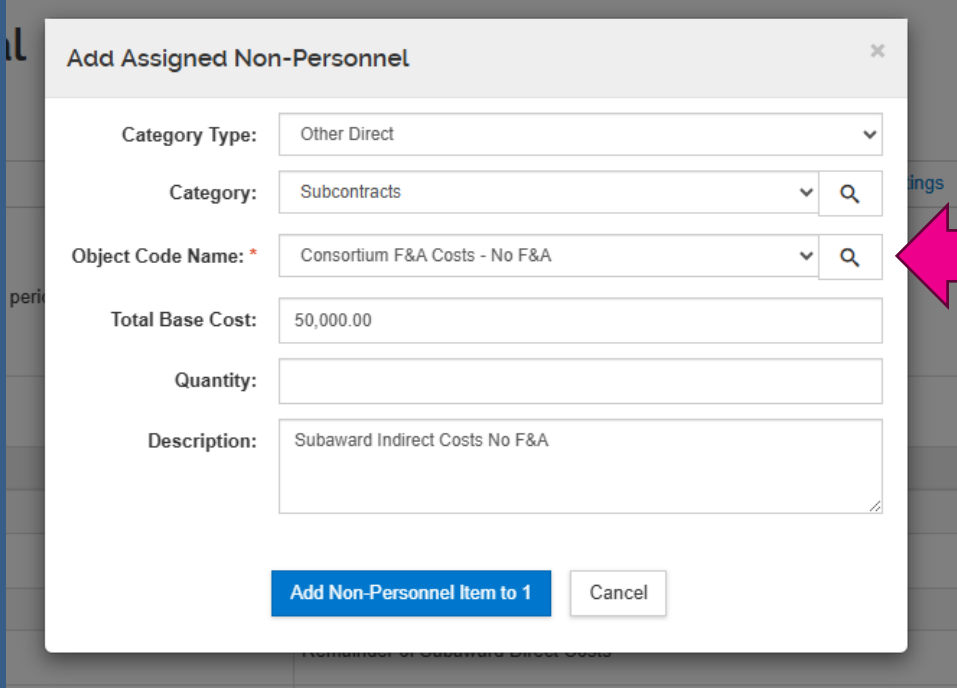

Object Code Name: \* Consortium Direct Costs - No F&A

Total Base Cost: 66,498.00

Quantity:

Description: Remainder of Subaward Direct Costs

Add Non-Personnel Item to 1 Cancel



**Add Assigned Non-Personnel**

Category Type: Other Direct

Category: Subcontracts

Object Code Name: \* Consortium F&A Costs - No F&A

Total Base Cost: 50,000.00

Quantity:

Description: Subaward Indirect Costs No F&A

Add Non-Personnel Item to 1 Cancel

# BUDGET-NON-PERSONNEL COSTS

This is the complete Non-Personnel portion of the budget. Once entered, clicking the detail button will allow you to adjust inflation. If you are going to have different amounts each year for any of the line items, you want to take the inflation off as you will need to adjust the numbers manually. Notice I also indicated how many participants we estimate to have since I requested "Participant Support Costs."

Non-Personnel Costs

Add and configure non-personnel items for this budget period.

Period 1

Period 1

Assign Non-Personnel...

| Description                              | Description                             | Quantity | Total Base Cost | Actions                                   |
|--|---|----------|-----------------|---|
| Equipment                                |   |          |                 |   |
| Equipment                                | Widget for Biomedical Training          |          | 10,000.00       | <a href="#">Details</a> <a href="#">🔍</a> |
| Other Direct                             |   |          |                 |   |
| Consortium Direct Costs - No F&A         | Remainder of Subaward Direct Costs      |          | 66,498.00       | <a href="#">Details</a> <a href="#">🔍</a> |
| Consortium Direct Costs - Subject to F&A | First \$25,000 of the Subaward          |          | 25,000.00       | <a href="#">Details</a> <a href="#">🔍</a> |
| Consortium F&A Costs - No F&A            | Subaward Indirect Costs No F&A          |          | 50,000.00       | <a href="#">Details</a> <a href="#">🔍</a> |
| Supplies                                 | Lab Supplies                            |          | 2,500.00        | <a href="#">Details</a> <a href="#">🔍</a> |
| Participant Support                      |   |          |                 | 25 Participants <a href="#">(edit)</a>    |
| Participant Support Costs                | Registrations for Participant Workshops |          | 15,000.00       | <a href="#">Details</a> <a href="#">🔍</a> |
| Travel                                   |   |          |                 |   |
| Travel                                   | Required Conference for Investigators   |          | 5,000.00        | <a href="#">Details</a> <a href="#">🔍</a> |

When you click "Save and Continue," you will be prompted to apply Period 1 to future budget periods. Click yes if you have multiple years.

Please Select

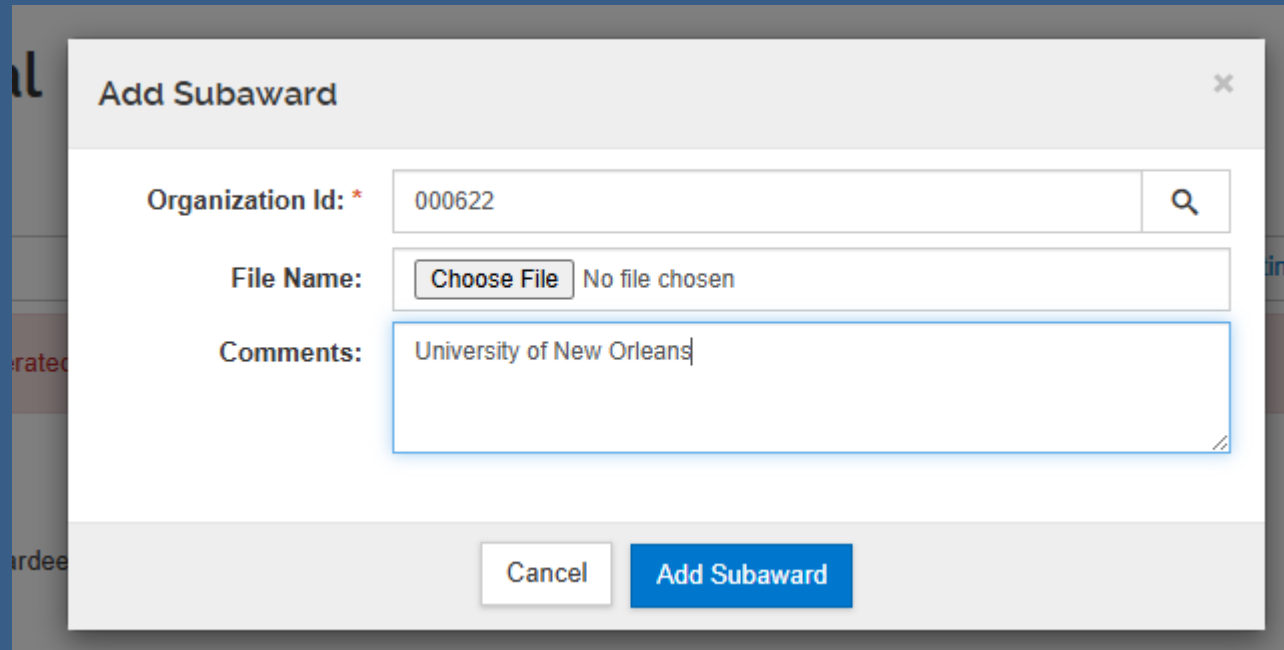
Are you ready to apply your Period 1 budget to future periods?

No

Yes

# BUDGET-SUBAWARDS

After completing the Non-Personnel Costs, we still have one more step to finalize the subawards within the budget. You need to enter the information on the subaward like how you added it under the Organizational section. Click the +Subaward button and enter the information.

A screenshot of a web application dialog box titled "Add Subaward". The dialog has a light gray header with a close button (X) in the top right. The main content area is white and contains three fields: "Organization Id: \*" with a text input containing "000622" and a search icon; "File Name:" with a "Choose File" button and the text "No file chosen"; and "Comments:" with a text area containing "University of New Orleans". At the bottom, there are two buttons: "Cancel" and "Add Subaward".

**Add Subaward**

Organization Id: \* 000622

File Name: Choose File No file chosen



Comments: University of New Orleans

Cancel Add Subaward

It will only pull up the Organization ID when you complete the search, so I usually add the name of the subaward in the Comments. This is the only thing you need to enter here as we added our financial information on the last page. Click "Add Subaward" to save it.

# BUDGET-COST SHARING

Since I am not charging the total effort for an Investigator to the project, I must notate cost sharing within the budget section. Notice that once I saved the previous page, it pulled up automatically and told me what I need to enter. I need to add the "Source Account."




### Cost Sharing

Assign and distribute any additional unallocated expenses to stakeholders, institutions, or other individuals.

[+ Add Cost Sharing](#)

| Period                     | Percentage | Source Account       | Amount                    | Unit Details                                 | Cost Share Type                     | Actions |
|----------------------------|------------|----------------------|---------------------------|--|-------------------------------------|---------|
| 1: 01/01/2026 - 12/31/2026 | 0.00       | <input type="text"/> | 8,280.00                  | <input type="text"/> <a href="#">Details</a> | <input type="text" value="select"/> |         |
|                            |            |                      | Total Allocated: 8,280.00 |  |                                     |         |
|                            |            |                      | Total Unallocated: 0.00   |  |                                     |         |



**Source Account**

At this stage of the proposal, you do not have to have a Cost Share account created. Enter a project that you plan to use in the event of an award, especially if the cost share is in-kind. This project number can and will change when an award is made. Also, make sure whoever has the authority to approve the cost share has signed off on it and there is documentation included in the "Attachments" tab.

# BUDGET-RATES

Coming from the Cost Share page, it will automatically take you to the Budget Summary. At this point, you want to click the “Rates” tab on the left-hand side to confirm all the correct rates are being used.

[« Return to proposal](#)

[Periods & Totals](#)

**Rates**

[Personnel Costs](#)

[Non-Personnel Costs](#)

[Subawards](#)

[Institutional Commitments](#)

[Project Income](#)

[Modular](#)

[Budget Notes](#)

[Budget Summary](#)

Rates

Refresh All Rates Sync All Rates

Verify the default rates set by your institution. You can override them if necessary by clicking the edit icon to the right of each row.

Research F & A Fringe Benefits Inflation

Research F & A

Sync to Current Institutional Rates Reset to Default Rates

| Description | On Campus Flag | Fiscal Year | Start Date | Institute Rate | Applicable Rate * |
|-------------|----------------|-------------|------------|----------------|-------------------|
| MTDC        |                |             |            |                |                   |
| MTDC        | No             | 2026        | 07/01/2025 | 26.00          | 26.00             |
| MTDC        | Yes            | 2026        | 07/01/2025 | 50.00          | 50.00             |
| MTDC        | No             | 2027        | 07/01/2026 | 26.00          | 26.00             |
| MTDC        | Yes            | 2027        | 07/01/2026 | 50.00          | 50.00             |
| TDC         |                |             |            |                |                   |
| TDC         | No             | 2021        | 07/01/2020 | 26.00          | 26.00             |
| TDC         | Yes            | 2021        | 07/01/2020 | 47.00          | 47.00             |

If you need to change a rate, you can click on the rate listed on the right-hand side and type in the correct rate.

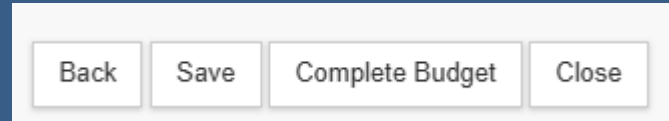
# BUDGET-SUMMARY

You want to have your ORS Budget Worksheet open to compare to the summary to make sure everything you entered is correct. There may be a slight difference in the numbers because of rounding, which does not have to be updated. Kuali only accepts two decimal places while Excel accepts infinity. If the total number is off by more than a few dollars, you need to go back and check your entries.

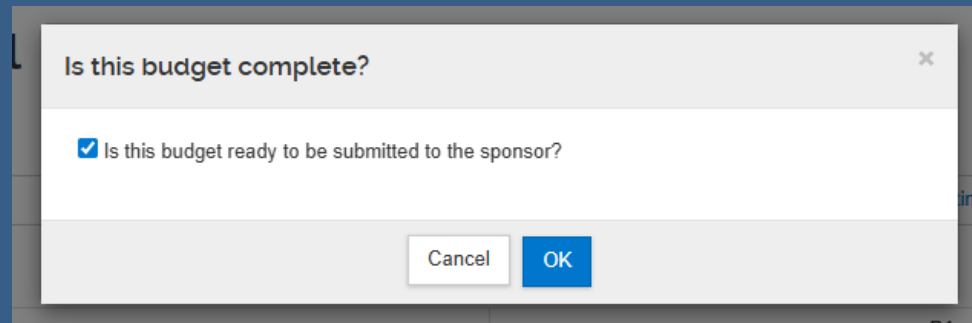
| Budget Summary          |                                 |        |              |
|-------------------------|---------------------------------|--------|--------------|
|                         | P1<br>(01/01/2026 - 12/31/2026) | Totals |              |
| <b>Personnel</b>        |                                 |        |              |
| ➤ Salary                | \$31,500.00                     |        | \$31,500.00  |
| ➤ Fringe                | \$11,970.00                     |        | \$11,970.00  |
| Calculated Direct Costs | \$0.00                          |        | \$0.00       |
| Personnel Subtotal      | \$43,470.00                     |        | \$43,470.00  |
| <b>Non-personnel</b>    |                                 |        |              |
| ➤ Equipment             | \$10,000.00                     |        | \$10,000.00  |
| ➤ Travel                | \$5,000.00                      |        | \$5,000.00   |
| ➤ Participant Support   | \$15,000.00                     |        | \$15,000.00  |
| ➤ Other Direct          | \$143,998.00                    |        | \$143,998.00 |
| Calculated Direct Costs | \$0.00                          |        | \$0.00       |
| Non-personnel Subtotal  | \$173,998.00                    |        | \$173,998.00 |
| <b>Totals</b>           |                                 |        |              |
| Total Direct Cost       | \$217,468.00                    |        | \$217,468.00 |
| Total F&A Costs         | \$37,985.02                     |        | \$37,985.02  |
| Totals Subtotal         | \$255,453.02                    |        | \$255,453.02 |

# COMPLETE BUDGET

If everything is correct, you are ready to complete your budget. There is a "Complete Budget" button at the bottom of the page.

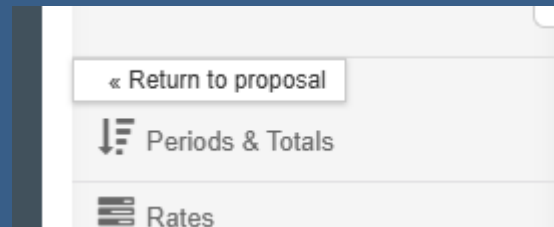


You will be prompted to confirm that your budget is ready to be submitted to the sponsor. Click "OK."



# COMPLETE BUDGET

It will take you back to the Budget Summary. **Do not click on the "Close" button.** It returns you back to your dashboard and you will have to go back into the proposal to finish it. Click the "Return to Proposal" button on the left-hand side.




The line for your budget you are using for the proposal should now be highlighted green. You can then Save and Continue to move forward in the proposal.


| Budget   |         |             |           |            |            |            |          |          |         |  |
|--|---------|-------------|-----------|------------|------------|------------|----------|----------|---------|--|
| Budgets  |         |             |           |            |            |            |          |          |         |  |
| The following budgets are linked to this proposal. |         |             |           |            |            |            |          |          |         |  |
| Name   | Version | Direct Cost | F&A       | Total      | Start      | End        | Status   | Comments | Actions |  |
| Carly Training Budget Initial<br>(for submission)  | 1       | 217,468.00  | 37,985.02 | 255,453.02 | 01/01/2026 | 12/31/2026 | Complete |          | Action▼ |  |


# PERMISSIONS

You can use this page to add anyone that you want to have access to the proposal that you created. If you don't need to add anyone, you can leave it as is. Click "Save and Continue" to move forward.

### Permissions

 Document was successfully saved.



 Add User

| User Name | Roles                     | Actions                                     |
|-----------|---------------------------|---|
| cgerva    | Aggregator Document Level | <div><div>Edit</div><div>Delete</div></div> |

# SUPPLEMENTAL INFO

There are several tabs here that need to be addressed.

## Supplemental Info

*i* Document was successfully saved.

OFFICE USE ONLY

Keywords

Legacy Project

New Organization

General

Prime Deadline

New Sponsor

**Keywords:** Get this information from your PI. It makes it a lot easier otherwise you are just guessing. You must enter three total keywords.

### Keywords

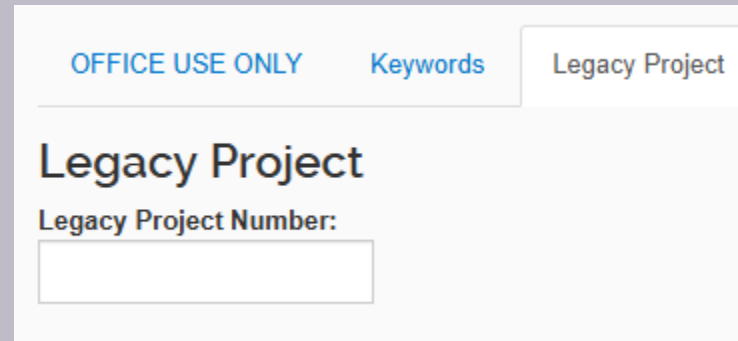
**Keyword 1: \***  
BOR3901 - Adult & Continuing Education

**Keyword 2: \***  
NIH0720005 - Biomedical Research Training

**Keyword 3: \***  
NIH0730015 - Folk Medicine

# SUPPLEMENTAL INFO

**Legacy Project:** This information is only for “New Submission-Legacy Project.” If this is the case, enter the ORS Project Number from the yellow routing packet. Otherwise, leave this blank.

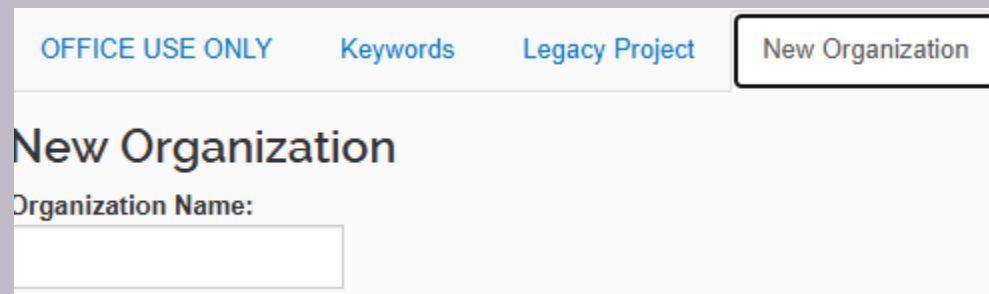


OFFICE USE ONLY   Keywords   Legacy Project

**Legacy Project**

Legacy Project Number:

**New Organization:** When you added your subawards on the Organizational Tab and you had an organization that wasn't there, you should have chose “New Organization.” This tab is where you will enter the “New Organization” information. ORS will have it added and ask you to update.



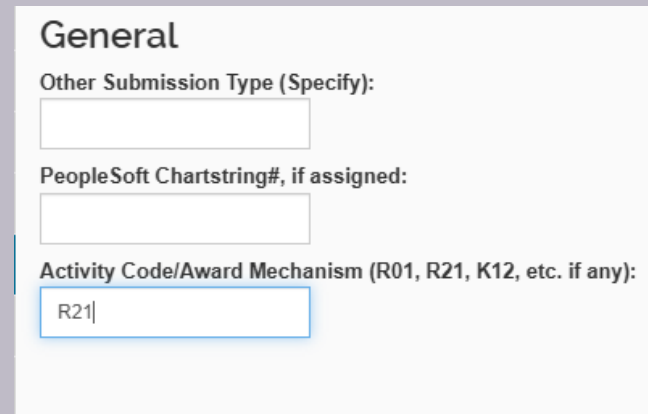
OFFICE USE ONLY   Keywords   Legacy Project   New Organization

**New Organization**

Organization Name:

# SUPPLEMENTAL INFO

**General:** There are three pieces of information on this tab: Other Submission Type, PeopleSoft Chartstring #, and Activity Code/Award Mechanism.

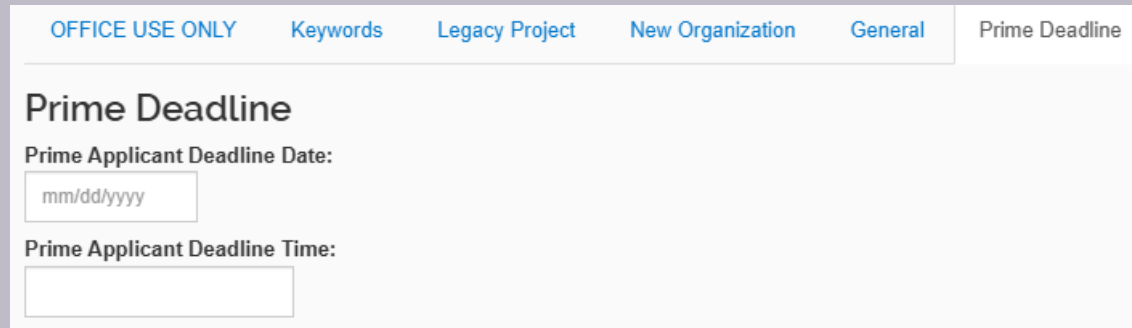


The screenshot shows a form titled "General" with three input fields. The first field is labeled "Other Submission Type (Specify):" and is empty. The second field is labeled "PeopleSoft Chartstring#, if assigned:" and is empty. The third field is labeled "Activity Code/Award Mechanism (R01, R21, K12, etc. if any):" and contains the text "R21|".

1. **Other Submission Type:** If the submission is something other than what was listed on the Proposal Type page, describe it here.
2. **PeopleSoft Chartstring #:** This is something you will complete during a Follow Up Submission. This will be blank for a New Proposal.
3. **Activity Code/Award Mechanism:** Complete this for all NIH proposals. If there is no Activity Code, list "None."

# SUPPLEMENTAL INFO

**Prime Deadline:** If LSUHSC is the subaward, list the deadline that the Prime Entity provided for the documents to be submitted to them.



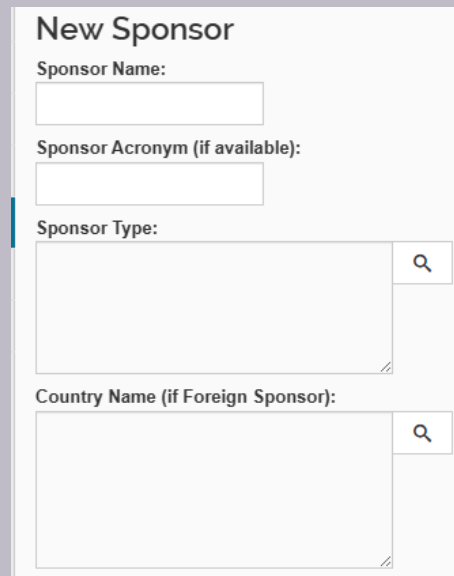
OFFICE USE ONLY   Keywords   Legacy Project   New Organization   General   Prime Deadline

### Prime Deadline

Prime Applicant Deadline Date:

Prime Applicant Deadline Time:

**New Sponsor:** This is like the “New Organization” tab but for a Sponsor that the institution has not previously applied to.



### New Sponsor

Sponsor Name:

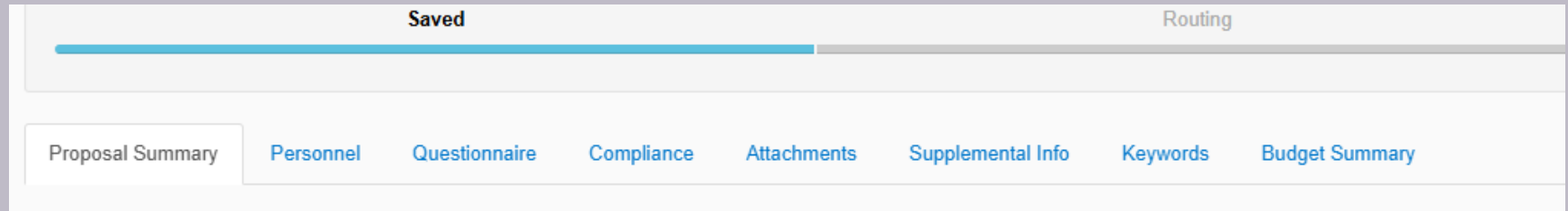
Sponsor Acronym (if available):

Sponsor Type:

Country Name (if Foreign Sponsor):

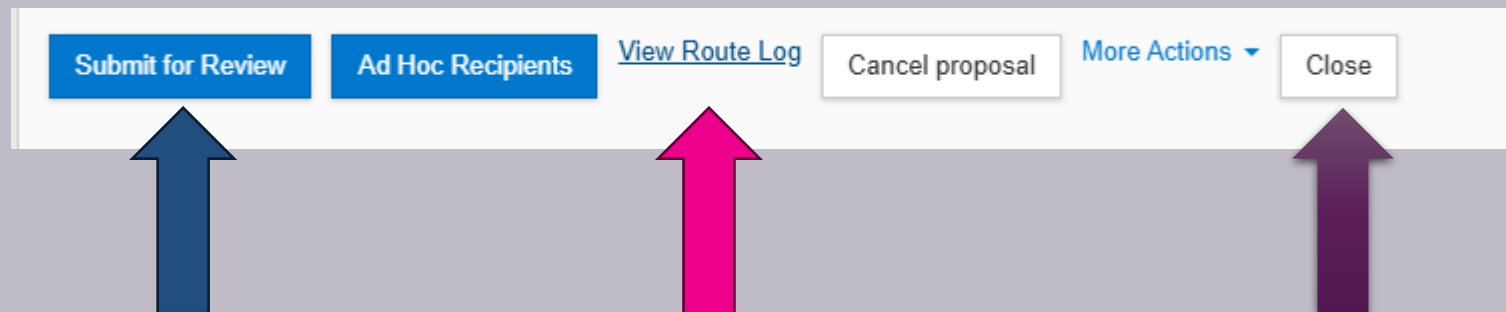
# SUBMIT

You are ready to submit your proposal for review. Utilize the tabs to confirm everything you entered for each section is correct.



The screenshot shows a progress bar at the top with two segments: 'Saved' (blue) and 'Routing' (grey). Below the progress bar is a row of tabs: 'Proposal Summary' (active), 'Personnel', 'Questionnaire', 'Compliance', 'Attachments', 'Supplemental Info', 'Keywords', and 'Budget Summary'.

Once you have reviewed everything, click the "Submit for Review" button. It will begin the routing process. Once submitted, you can use the "View Route Log" hyperlink to see where the proposal is in the process and view the entire approval chain. Click "Close" to move back to your dashboard. Closing it via the "X" in the top right-hand corner doesn't close the proposal.



The screenshot shows a row of buttons: 'Submit for Review' (blue), 'Ad Hoc Recipients' (blue), 'View Route Log' (hyperlink), 'Cancel proposal' (grey), 'More Actions' (dropdown menu), and 'Close' (grey). Three arrows point to these buttons: a blue arrow to 'Submit for Review', a pink arrow to 'View Route Log', and a purple arrow to 'Close'.



# FOLLOW UP SUBMISSION

# REASONS FOR FOLLOW UP SUBMISSIONS

- You forgot something in a “New Proposal” that has already been internally approved.
- Just in Time
- Obtain signatures for subawards and other types of agreements
- Progress Reports
- Carryover Requests
- No Cost Extensions
- Closeouts (Invention Statement, Final RPPRs)

# GETTING STARTED WITH A FOLLOW UP SUBMISSION

- Start by going to your “Common Tasks” and click the “All My Proposals” hyperlink under the **Proposal Development** box.

The screenshot shows a dashboard titled "Common Tasks" with a sidebar on the left containing icons for a home page, search, and notifications. The main area is divided into five panels: "Quick Links", "COI", "Institutional Proposal", "Negotiation", and "Proposal Development".

- Quick Links:** Contains links for "Doc Search", "Current & Pending Support", "Person Training", "View S2S Submissions", and "Locks". A blue arrow points to the "Doc Search" link.
- COI:** Contains a link for "My Disclosures".
- Institutional Proposal:** Contains links for "Create Institutional Proposal", "Create Proposal Log", "Search Institutional Proposals", and "Search Proposal Logs".
- Negotiation:** Contains links for "All My Negotiations", "Create Negotiation", and "Search Negotiation".
- Proposal Development:** Contains links for "All My Proposals", "Create Proposal", and "Search Proposals". A blue arrow points to the "All My Proposals" link.

# GETTING STARTED WITH A FOLLOW UP SUBMISSION

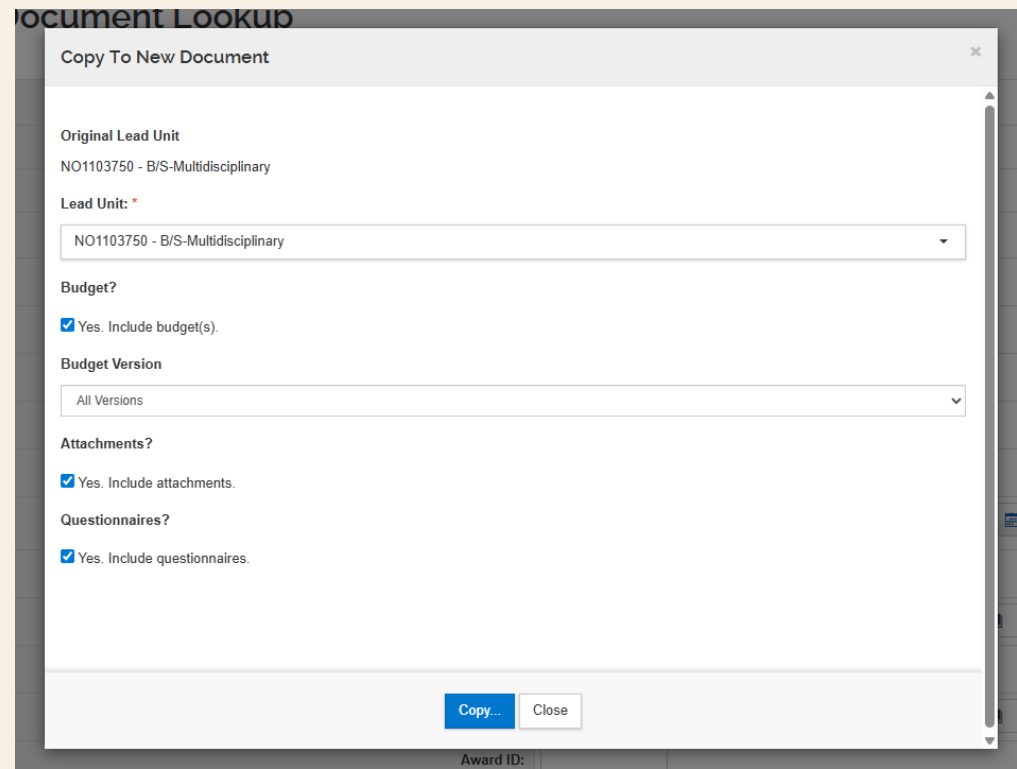
- Find the proposal you want to follow up on. If you have already done a follow up for this proposal, find the most recent one you completed.
- Click "Copy" to create a new Follow-Up Submission.

|                                |      |       |  |             |  |  |       |  |  |   |            |           |                           |            |       |                       |                        |
|--------------------------------|------|-------|--|-------------|--|--|-------|--|--|---|------------|-----------|---------------------------|------------|-------|-----------------------|------------------------|
| view<br>edit<br>copy<br>medusa | 4044 | 17927 | Initial<br>Submission -<br>New Project | In Progress | Creation of a Training Plan for<br>Research Administrators at the<br>LSU Health Sciences Center<br>New Orleans |  | 1457X | Creation of Research<br>Training for<br>University Personnel |  | NIH - NIGMS<br>(National Institute of<br>General Medical<br>Sciences) | Carly Pigg | NO1103750 | B/S-<br>Multidisciplinary | 09/08/2025 | 1457X | Not in a<br>hierarchy | 08/22/2025<br>11:31 AM |
|--------------------------------|------|-------|--|-------------|--|--|-------|--|--|---|------------|-----------|---------------------------|------------|-------|-----------------------|------------------------|



# GETTING STARTED WITH A FOLLOW UP SUBMISSION

- You will receive a pop-up for "Copy to New Document." Enter the information that is requested. If Budgets, Attachments, or Questionnaires do not need to be included, uncheck those boxes before hitting "Copy." You cannot go back and reverse this without starting over.




The screenshot shows a 'Document Lookup' window with a 'Copy To New Document' pop-up. The pop-up contains the following fields and options:

- Original Lead Unit:** NO1103750 - B/S-Multidisciplinary
- Lead Unit:** \* NO1103750 - B/S-Multidisciplinary (dropdown menu)
- Budget?** ☒ Yes. Include budget(s).
- Budget Version:** All Versions (dropdown menu)
- Attachments?** ☒ Yes. Include attachments.
- Questionnaires?** ☒ Yes. Include questionnaires.

At the bottom of the pop-up are two buttons: 'Copy...' and 'Close'.

# BASICS

- Everything from your previous proposal will populate. Only change the items that pertain to this submission. Everything else will remain the same.
- On the initial screen, you will at least need to change the "Proposal Type."
- We are changing from "Initial Submission-New Project" to "Follow-up Submission."
- You may update the date if this is a Follow-Up Submission for a Progress Report or later submission.



**Proposal Details**  
\* indicates required fields

Proposal Type: \* Follow-up Submission ▼

Lead Unit: NO1103750 - B/S-Multidisciplinary

# DELIVERY INFO

- If this is the first follow-up submission after an initial application, you may have to change the "Submission By" and "Submission Type." If it's an NIH project, you would change the type from ASSIST to eRA Commons if the application has moved through the Scientific Review process.
- Also, you want to update the "Submission Description."

|                            |  |   |   |
|----------------------------|--|---|---|
| Submission By:             | <input type="text" value="ORS"/>             | ▼ | 🔍 |
| Submission Type:           | <input type="text" value="eRA Commons"/>     | ▼ | 🔍 |
| Submission Account ID:     | <input type="text"/>                         |   |   |
| Submission Name & Address: | <a href="#">Change</a> <a href="#">Clear</a> |   |   |
| Number of copies:          | <input type="text"/>                         |   |   |
| Submission description:    | <input type="text" value="Just in Time"/>    |   |   |

# SPONSOR & PROGRAM INFORMATION

- The only item you will change on this page is the due date. If there is no due date for this follow-up, you can leave it blank or put in a date that you feel is reasonable for the proposal to be reviewed.

Sponsor deadline: 12/04/2025

Notice of Opportunity: Dec 2025

Opportunity ID:

Opportunity Title:

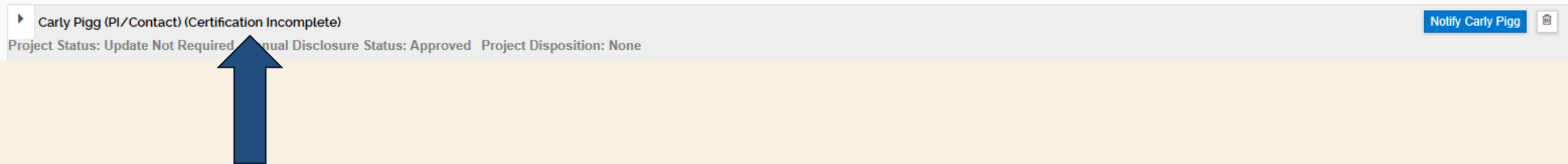
Subawards:

Sponsor Proposal ID:

Today Done

# KEY PERSONNEL

- The Proposal Certification for each PI will need to be completed again.
- Also, since we added a TBA person for the original proposal this is a good time to add them to the Key Personnel tab if they have been hired since the submission of the application.



# QUESTIONNAIRE

- The Proposal Purpose should remain the same for any Follow-Up Submission. **If it doesn't, that constitutes a change in scope which would require a Prior Approval.**
- Some of the answers on the Proposal Questions tab may change as the project is implemented, specifically the question on Publications. That will need to be updated as publications are added into the NLM Database.
- The Proposal Type tab will have additional types available for you to choose from on a Follow-Up Submission. You can choose more than one, but make sure what you check applies to the submission you are working on.

Proposal Purpose ✓ Proposal Questions ✓ Proposal Type(s) ▼

### Proposal Type(s) (Incomplete)

Please identify the Follow-up Submission type being routed (select all that apply): ⓘ

- ☐ Grant Application - Initial (follow-up to NOI/LOI)
- ☐ Grant Application - Resubmission
- ☐ Withdrawal
- ☒ Just-in-Time
- ☐ Additional Requested Information
- ☐ Notice of Award Agreement
- ☐ Amendment
- ☐ Change in Key Personnel and/or PI
- ☐ Rebudget Request
- ☐ Carryover Request
- ☐ No-Cost Extension
- ☐ Performance/Progress Report
- ☐ Final Report/Invention Statement
- ☐ Competing Supplement

- ☐ Competing Supplement
- ☐ Competing Continuation/Renewal
- ☐ Closeout
- ☐ Relinquishment/Transfer
- ☐ Termination
- ☐ Other

If you selected "Other," please enter description in the text box. If "Other" is not selected type "N/A". ⓘ

N/A

# COMPLIANCE AND ATTACHMENTS

- **Compliance:** Update your items from Pending to Approved. If you are completing a Just in Time submission, they must move from Pending to Approved.
- **Attachments:** All your attachments from your previous submission will be here. You can either leave them or remove the items that don't apply to this submission. I always leave the Abstract. You will need to upload any documents required for this submission as well.

# BUDGET

- The budget you previously submitted will be here, but it has moved back to “Incomplete.”
- Depending on the type of submission, you may not need a budget (JIT, Final RPPR).
- If you checked include Budgets on your “Copy to New Document” pop-up, you will have to include a budget.
- If there are no changes to the budget, you can mark your original budget as “Complete” to move on in the proposal. Remember to keep your ORS Budget Worksheet and Justification in the Attachments tab if you are including that original budget.
- You can add a budget, especially if your Follow-Up Submission is a Carryover Request. Click the +Add Budget button and follow the process from the directions for a New Submission.

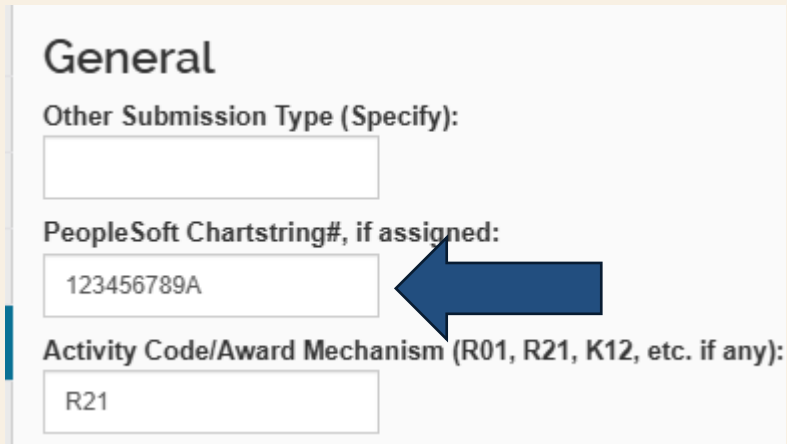
The following budgets are linked to this proposal.

| Name                          | Version | Direct Cost | F&A       | Total      | Start      | End        | Status     | Comments | Actions |
|-------------------------------|---------|-------------|-----------|------------|------------|------------|------------|----------|---------|
| Carly Training Budget Initial | 1       | 217,468.00  | 37,985.02 | 255,453.02 | 01/01/2026 | 12/31/2026 | Incomplete |          | Action▼ |



# SUPPLEMENTAL INFO

- Most of the tabs will remain the same from the previous submission.
- There are two tabs you may be updating:
  - **General:** You want to add the PeopleSoft Chartstring# assigned if the proposal received an award.
  - **Prime Deadline:** If we are a subaward and the Prime Entity provided you with a deadline, update this to the deadline for this submission.



**General**

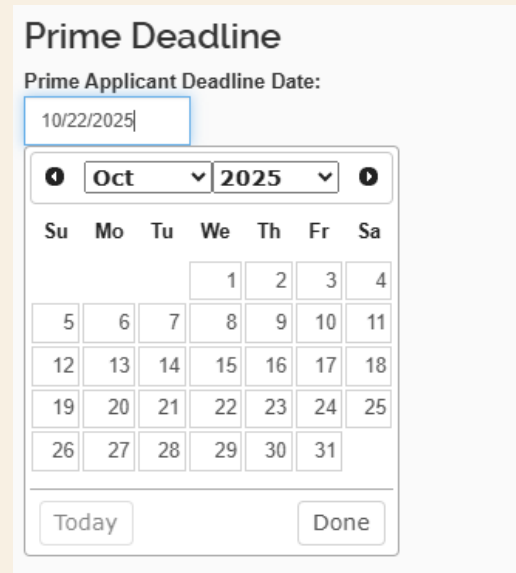
Other Submission Type (Specify):

PeopleSoft Chartstring#, if assigned:

123456789A

Activity Code/Award Mechanism (R01, R21, K12, etc. if any):

R21



**Prime Deadline**

Prime Applicant Deadline Date:

10/22/2025

Oct 2025

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
|    |    |    | 1  | 2  | 3  | 4  |
| 5  | 6  | 7  | 8  | 9  | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 |    |

Today Done



# FINAL TIPS AND TAKEAWAYS

- REVIEW EVERYTHING BEFORE SUBMITTING. IF INTERNALLY APPROVED AND YOU FIND SOMETHING THAT IS INCORRECT, THE PROPOSAL WILL NEED TO BE REROUTED.**
- DON'T SKIP OVER ADDING THE CONGRESSIONAL DISTRICT. YOU NEED THIS INFORMATION TO COMPLETE THE SF424.**
- REMEMBER TO MARK ANYTHING REQUIRING SIGNATURE AS "INCOMPLETE" IN THE ATTACHMENTS TAB.**
- DON'T FORGET ABOUT THE "RETURN TO PROPOSAL" BUTTON WHEN YOU HAVE COMPLETED YOUR BUDGET.**

**- MAKE SURE THAT ALL BOXES CHECKED AND EVERYTHING INCLUDED IS ACCURATE FOR THAT SUBMISSION. FOR EXAMPLE, ON A FOLLOW-UP SUBMISSION, CHECK THE CORRECT BOX ON THE QUESTIONNAIRE PROPOSAL TYPE MATCHES WHAT YOU ARE TRYING TO ACCOMPLISH.**

**AMENDMENT FOR A SUBAWARD ≠ COMPETITIVE RENEWAL**

**- REMEMBER TO CLICK THE "CLOSE" BUTTON AND NOT THE X IN THE TOP RIGHT CORNER. CLICKING THE X DOES NOT CLOSE THE PROPOSAL.**



# THANK YOU

Carly Pigg, CRA, CPRA, CFRA

504-568-4439

[cgera@lsuhsc.edu](mailto:cgera@lsuhsc.edu)