

## Creating Board of Regents Support Fund (BoRSF) Proposals

These instructions should be used to create and route BoRSF Research Competitive Subprogram proposals. **BoRSF Notices of Intent are not routed in GeauxGrants.**

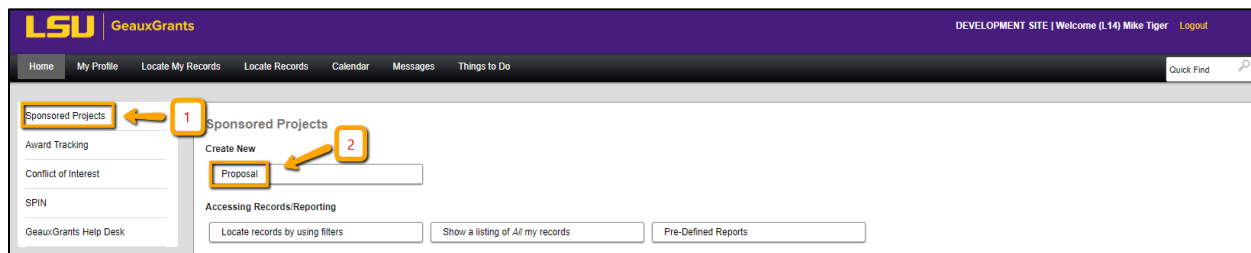


Visit [OSP's Board of Regents Support Fund Programs webpage](#) for budget and budget justification templates.

### How to Create a Proposal Development (PD) Record

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

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



### New Proposal Questionnaire

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

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

New Proposal Questionnaire

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

Tiger, (L13) Mike the Change

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

Create a New Proposal

Copy From Existing Proposal

Continue

- **Step 1:** Click on “Create a New Proposal” and click Continue.

**New Proposal Questionnaire**

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

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

[Continue](#)

Create a New Proposal  
Copy From Existing Proposal

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

**New Proposal Questionnaire**

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

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

Step 2: Please Select a Proposal Type

[Continue](#)

Setup Proposal Manually

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

**New Proposal Questionnaire**

Step 0: Confirm you intend for the PI of this proposal to be Billiot, Gina Larpernter [Change](#)

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

Step 2: Please Select a Proposal Type

[Continue](#)

New

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

**New Proposal Questionnaire**

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

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

Step 2: Proposal Type New

Step 3: Select a Sponsor

[Continue](#)

LA Board of Regents (BOR)

- **Step 4:** Will be automatically numbered by the system.
- **Step 5:** Enter Proposal's Title and click Continue. ***This must match the NOI submitted in LOGAN.***

**New Proposal Questionnaire**

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

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

Step 2: Proposal Type New

Step 3: Selected Sponsor Alfred P. Sloan Foundation

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

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

[Continue](#)

- **Step 6:** Enter Project Start and End Dates and click Continue. **Start date should be June 1, 2026, and the end date should be June 30, 2027.**

### New Proposal Questionnaire

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

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

Step 2: Proposal Type

Step 3: Selected Sponsor

Step 4: "Tracking" Number or "Proposal" Number

Step 5: Proposal's Title

Step 6: What are the project start and end dates?

Tiger, (L17) Mike the [Change](#)

Create a New Proposal

New

LA Board of Regents (BOR)

This proposal will be automatically numbered.

Test BORSF RCS

From

To

01-Jun-2026

30-Jun-2027

[Continue](#)

- **Step 7:** You will need to adjust the number of budget periods to 1 since this is a 13 month project. After updating. Click Continue.

### New Proposal Questionnaire

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

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

Step 2: Proposal Type

Step 3: Selected Sponsor

Step 4: "Tracking" Number or "Proposal" Number

Step 5: Proposal's Title

Step 6: Project Start and End Dates

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

Tiger, (L17) Mike the [Change](#)

Create a New Proposal

New

LA Board of Regents (BOR)

This proposal will be automatically numbered.

Test BORSF RCS

01-Jun-2026 to 30-Jun-2027

1

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

[Continue](#)

- Click Back or Step back through responses button at any step to go back to the previous step to change information.

- Ensure all information is correct and click Create Proposal.

### New Proposal Questionnaire

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

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

Step 2: Proposal Type

Step 3: Selected Sponsor

Step 4: "Tracking" Number or "Proposal" Number

Step 5: Proposal's Title

Step 6: Project Start and End Dates

Step 7: Number of Budget Periods

Is all of the above information correct?

Tiger, (L17) Mike the [Change](#)

Create a New Proposal

New

LA Board of Regents (BOR)

This proposal will be automatically numbered.

Test BORSF RCS

01-Jun-2026 to 30-Jun-2027

1

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

[Step back through responses](#) [Create Proposal](#)



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

Done Save

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

Record/Institution #  
equivalent to SPS#

Proposal  
AM2000551

Show Completed

## Setup Questions

GeauxGrants will automatically generate a Proposal/Record/Institution #. GeauxGrants numbering will be AMFYXXXX. For Fiscal Year (FY) 2026, all numbers begin with AM26.

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



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

Proposal Sponsor

Project?

Sponsored project?

ation

this Submission?

#### HELP INFORMATION

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

- Read instructions at the top of the page, answer all questions. Click Save at any point to preserve all data entered. Clicking Completed will validate form and will prompt user to save changes by clicking OK.
- Deadline: Enter deadline date as the date you would like OSP to submit your proposal. This should not be the OSP internal deadline. All proposals must be submitted by OSP before 4:30 PM on 10/17/2025.
- Associated Departments: If the proposal includes investigators from multiple units or the PI has a joint appointment, the Associated Department will need to be added in order for the investigator's associated unit heads/administrators to view the proposal.
  - To add associated departments (i.e., CCT, CAMD, joint appointments, etc.), click the Add button. If the PI has a joint appointment, click Add next to PI Departments also.

Associated Departments ?

PI Departments ?

LSUAM | Sch of VETM | Pathobiological Sciences Add

LSUAM | Sch of VETM | Pathobiological Sciences Add

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

**Department**

LSUAM | ORED | CCT Director's Office

**Filter by Institution**

Louisiana State University and Agricultural and Mechanical College ▼

Select Close

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

**TIP!**

**The Primary Department will administer the award in Workday.**

Associated Departments ?

PI Departments ?

LSUAM | Sch of VETM | Pathobiological Sciences Add

LSUAM | Sch of VETM | Pathobiological Sciences Add

LSUAM | ORED | CCT Director's Office Remove

## LSU Questionnaire

This is where we capture compliance, budget and specific information about your proposal.

This is also where we will record Investigators for F&A & Project % Credits.

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



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

- For BoRSF, Question #17 “F&A Reduction or Waiver (including sponsor limited rate)” should be answered Yes – Sponsor Published Rate
- For BoRSF Question #18 “Is Tuition Remission allowed per sponsor published guidelines” should be answered No. BoRSF does allow cost sharing of Graduate Assistant Tuition Remission.
- For BoRSF Question #19 “Cost sharing/matching” should be answered Yes – Sponsor Mandated. Cost sharing is a review consideration so it is allowed but should not exceed 1:1.

**\* 17) F&A Reduction or Waiver (including sponsor limited rate)?**

Yes ☒ No ☐

\* Select Type:

Sponsor Published Rate

**\* 18) Is Tuition Remission allowed per sponsor published guidelines?**

Yes ☐ No ☒

**\* 19) Cost sharing/matching?**

Yes ☒ No ☐

\* Select Type:

Sponsor Mandated

- For BoRSF Question #23 “RFP/Announcement – Enter URL or Attach RFP on Internal Uploads and Routing tab” – you do not need to include link to RFP. Instead type in the program name for the proposal (e.g., RCS.)

- Question #26 - Investigators % F&A Distribution & % Project Credit:
  - **Step 1:** You will enter the Investigator Name, Role, Department, and %. If an investigator has a joint appointment and is required to split his/her credit between units, you will need to enter them twice. To add additional investigators or departments click the Add button.

**\* 26) Investigator**

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

**Add**

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

**Departments** Close

Find Department:  Locate **Select**

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

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

Done Save This is a test manual proposal for Dept Admin. (L14) Mike the Tiger - (LSUAM) | Sch of VETM | Pathobiological Sciences (Alfred R. Sloan Foundation) Proposal AM200123

Setup Questions ☒ LSU Questionnaire ☒ Budget ☒ Personnel ☒ Internal Uploads & Routing ☒

**Data Collection**

These Mandatory Questions need to be completed.

Page Question

3) Recombinant DNA, infectious agents, transgenic plants or animals, human or primate cells/tissues or biological toxins?

1 of 1 page.

Validate **Complete**

## Budget Tab

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



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

## Budget – Setup (Add Cost Sharing Sources)

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

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

- There are two default sources of cost sharing: Institution and Above the Cap (related to NIH salary cap which LSU does not use). The Charge To sources default to the PI's department.
- Under the Charge To column, change to the department/college providing cost sharing. In the Short Name column, add an acronym for the unit.
- For institutional cost sharing that will be documented via a journal entry (tuition remission, unrecovered F&A), change Charge to column to Louisiana State University and Short Name of LSU.

SOURCE	CHARGE TO	SHORT NAME	ACTUAL %	AMOUNT	ACCOUNT NUMBER	DELETE
SRC 1	LA Board of Regents (BOR)	Sponsor		0		
SRC 2	LSUAM   ORED   Vice President Research and Economic Developm	ORED		0		
SRC 3	LSUAM   Sch of VETM   Pathobiological Sciences	PBS		0		
Total			100.000%	\$ 0		

## Budget – Subawards

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

CATEGORY	PERIOD 1	DIRECT COSTS
No records to display.		
Subtotal Non-Personnel:		\$ 0



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



**If Subaward Institution is not in GeauxGrants, complete [Request to Add Subrecipient](#) form**

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

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

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

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

## Budget – Non-Personnel

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

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

Non-Personnel Costs

Detail Justifications **Cost Sharing**

Show Calculations Save and Close Save Close

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

PERIOD 1

SPONSOR [Hide]

Percent 75.000

Cost 150,000

Type

Category

INST [Hide]

Percent 25.000

Cost 50,000

Type

Category

## F&A

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

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

Done Save

Budget +

F&A

Cost Sharing

Justifications

Versions

Setup

Calculation rate method

Prevailing Blended

Scheme

Base Show

Rate

Rate

SWF

Manual Entry

25.000

Apply

Manual F&A

Source View: Sponsor

Edit Mode

Proposal AM210045

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

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

Proposal  
AM210045

Done Save

Budget +

F&A

Cost Sharing

Justifications

Versions

Setup

Cost Sharing

Personnel Costs

	PERIOD 1	PERIOD 2	PERIOD 3	TOTAL
Detail Tiger, (L13) Mike				
Sponsor	0	0	0	0
PBS	0	0	0	0
LSU	0	0	0	0
Subtotal Personnel:	\$ 0	\$ 0	\$ 0	\$ 0

Non-Personnel Costs

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

Budget Summary

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

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

F&A

Show Calculations Save and Close Save Close

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

PERIOD 1

SPONSOR [Hide]

Percent 100.000

Cost 0

Type

Category

INST [Hide]

Percent 0.000

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

**F&A**

Show Calculations **Save and Close** Save Close

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

PERIOD 1

**SPONSOR [Hide]**

Percent 40.000

Cost 50,000

Type

Category

**INST [Hide]**

Percent 60.000

Cost 75,000

Type

Category

**ABOVE THE CAP [Hide]**

Percent 0.000

Cost 0.00

## Budget – Complete

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

**Budget Summary**

Project Period: 01-Jun-2026 to 30-Jun-2027

Source View: Sponsor

Rollup subprojects: Not Rollup

Proposal Structure

Import/Export

**Complete Budget**

Year/Period	Periods [hide]		Sponsor [show]	Cost Sharing [show]	Project [hide]			Total
	Start	End			Directs	F&A	Total	
1	01-Jun-2026	30-Jun-2027	\$ 200,000	\$ 125,000	\$ 200,000	\$ 125,000	\$ 325,000	
			\$ 200,000	\$ 125,000	\$ 200,000	\$ 125,000	\$ 325,000	

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

**Budget Summary**

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

Source View: Sponsor

Rollup subprojects: Not Rollup

Proposal Structure

Import/Export

Build PDF

**View Mode**

Un-Complete Budget

## Personnel

- The PI will auto populate on this tab.



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

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

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

PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS			CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
							CALENDAR	ACADEMIC	SUMMER			
(L13) Mike the Tiger PD/PI * Certifications and Training						Louisiana State University LSUAM   Sch of VETM   Pathobiological Sciences	0	0	0			

- Type in the annual effort (requested + cost shared). If the effort varies each year, type in the average. Click Save.

- The Responsible column indicates who is an Investigator per PS-98 for Financial Conflict of Interest. Senior Personnel are automatically checked. The LSU PI and Co-Investigators should be checked. Indicate other responsible investigators by clicking the checkbox by their name. If necessary, add other PS-98 investigators to personnel tab.
- COI column will either have a green check or red question mark.
  - If green check mark appears, a Significant Financial Interest (SFI) disclosure has been “Received in GeauxGrants.”
  - If red question mark appears, a SFI needs to be submitted.
- The Legend describes who is on the Prime and who is on the Subaward. Uncheck any subaward investigators in the Responsible column.

The screenshot shows a table with two sections: 'Senior/Key' and 'Non-Key'. The 'Senior/Key' section has two rows. The first row is for '(L14) Mike the Tiger PD/PI \* Certifications and Training' with a green checkmark in the COI column and a checked box in the RESPONSIBLE column. The second row is for 'Bob Nicholls SubAward PI Certifications and Training' with a red question mark in the COI column and an unchecked box in the RESPONSIBLE column. An orange box highlights the 'Bob Nicholls' row with the text 'Need to uncheck for Subaward senior/key personnel'. The 'Non-Key' section has one row for 'TBH Graduate Student Certifications and Training' with a red question mark in the COI column and an unchecked box in the RESPONSIBLE column. A legend at the bottom left shows a red circle for 'Prime' and an orange circle for 'SubAward - AM200151-subk-01 (Bob Nicholls)'. Arrows point to the RESPONSIBLE column header, the Bob Nicholls row, and the legend.

Senior/Key												
PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS			CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
							CALENDAR	ACADEMIC	SUMMER			
1	(L14) Mike the Tiger PD/PI * Certifications and Training			✓	<input checked="" type="checkbox"/>	Louisiana State University and A&M College LSUAM   Sch of VETM   Pathobiological Sciences	0	2	0			
2	Bob Nicholls SubAward PI Certifications and Training			?	<input type="checkbox"/>	Nicholls State University Nicholls State University	0	0	0			

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

Legend:  
 1 Prime  
 2 SubAward - AM200151-subk-01 (Bob Nicholls)

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

## Internal Uploads & Routing

All documents for OSP review are uploaded here. Follow instructions at the top of the page.

**You must upload the BoRSF internal budget worksheet and budget justification here.**

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

The screenshot shows a table titled 'Components for Initial Application'. It has columns for 'FORM/DOCUMENT NAME', 'EDIT', 'STATUS', 'UPLOAD', and 'REMOVE'. There are two rows: 'LSU Questionnaire (Read Only) (Proposal Documentation)' and 'Review Summary (Proposal Documentation)'. Both rows have a status of 'Incomplete' and a 'Mandatory' upload requirement. Arrows point to the 'EDIT' and 'UPLOAD' columns.

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

The screenshot shows the 'REVIEWER SUMMARY PAGE' header. On the right, there are buttons for 'Lock Form', 'Validate', and 'Save'. An arrow points to the 'Lock Form' button.

LSU

REVIEWER SUMMARY PAGE

Lock Form Validate Save

- **Step 3:** To route proposal for review and approvals, click the Submit button next to Route Proposal. This step must be completed by 10/03/2025.

Pre-Review Route: Route Proposal ▼ Submit

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

Certification

Close

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

☒ Accept ☐ Decline

Continue

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

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



**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.**

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

[Refresh Route](#) **Route Path - Route Proposal** [Add New Person to Review Path](#) Submit

Step 1	Gold/Purple Assignment	Tracy Wang	Information Only	<a href="#">Insert After</a>
	Gold/Purple Assignment	Dana Tuminello	Information Only	<a href="#">Insert After</a>
	Gold/Purple Assignment	Darya Delaune Courville	Information Only	<a href="#">Insert After</a>
	Gold/Purple Assignment	Ryan Russell Greer	Information Only	<a href="#">Insert After</a>
	Gold/Purple Assignment	Rebecca Trahan	Information Only	<a href="#">Insert After</a>
Step 16	Investigators/Dept Heads/Deans	Test (L4) Mike the Tiger	Approval Required	<a href="#">Insert After</a>
	Investigators/Dept Heads/Deans	<b>Unit Dept Head</b>	Approval Required	<a href="#">Insert After</a>
	Investigators/Dept Heads/Deans	Test (L17) Mike the Tiger	Approval Required	<a href="#">Insert After</a>
	Investigators/Dept Heads/Deans	<b>Dean's Level Dept Head</b>	Approval Required	<a href="#">Insert After</a>
	Investigators/Dept Heads/Deans	Test (L5) Mike the Tiger	Approval Required	<a href="#">Insert After</a>

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



The screenshot shows a form titled "Add step". At the top right are "Add" and "Cancel" buttons. Below the title is a text input field labeled "Type Name". To the right of this field is a yellow callout box with the text "2. Begin typing name here." and an arrow pointing to the input field. Below the input field are two radio button options: "Informational Only" and "Approval Required". The "Approval Required" option is selected, indicated by a yellow arrow pointing to it.

- **Step 5c:** Inserted Investigator will appear after Step 16.
- **Step 6:** Click Submit in top right to route the proposal.