WELCOME TO THE CEOAS PROPOSALS & GRANTS OVERVIEW!

Presented By:
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Kelsey Herman
Stephanie Pearse

August 2015
Introduction

Goal: Share proposal updates, answer questions related to upcoming proposal deadlines and share tips on managing your awards

We’ll cover:

- New features on the CEOAS Proposal website
- Proposal Reminders
- Managing Awarded Grants
- Q&A
- One-on-One Cayuse assistance
New Proposal Features

- Proposal FAQs
- Proposal Budget Guidelines
- Request for Salary & Fringe Rates
- Budget Templates
- Cayuse Step-by-Step Walkthrough
- Facilities and Infrastructure Planning Form
Proposal FAQs

• See information related to using Cayuse, putting together a budget, distinctions between subawards and procurements and more…
Proposal Budget Guidelines

- Rates for graduate students (salary, OPE & tuition) have been updated starting Fall ’15.
- Also available on the first tab of the Budget Template.
Request for Salary & Fringe Rates

- Request payroll information for use in proposals.
- Request can be made for multiple employees and a specific project period.
- Rates will be provided by a member of the CEOAS Proposal Team.
Budget Templates

- Two budget templates available.
- If a custom template is needed (additional PIs, more than 5 project years, etc.), let the CEOAS proposal team know.
- Templates contain a GRA calculator that auto-populates their salary, fringe and tuition.
Cayuse Step-by-Step Walkthrough

• Walkthrough goes over each tab in Cayuse.
• Provides helpful reminders and tips.
Facilities and Infrastructure Planning Form

- Form no longer needs to be uploaded into Cayuse.
- If additional resources are needed, indicate so in Cayuse on the Budget Tab.
Proposal Submission Timeline

Couple weeks before deadline
- Request salary information for employees included in upcoming proposal
- Request clarification on solicitation (as needed)
- Add funding agency and subcontractors to Cayuse (as necessary)

1 week before deadline
- Send budget and justification to proposals@coas.oregonstate.edu for review
- Make any necessary updates before uploading into Cayuse
- Request approval for cost share

4 days before deadline
- Enter proposal in Cayuse and submit for routing
- Cayuse proposal reviewed by CEOAS Proposal Staff then routes to Sponsored Programs

Day of deadline
- Once approved in Cayuse, submit proposal to funding agency
- Methods vary depending on funding agency & proposal type
Proposal Reminders

- When another department is the lead:
  - CEOAS Proposal team still needs to review the CEOAS portion of the budget and justification before routing through Cayuse
  - Cost Share needs to be pre-approved before routing
  - CEOAS Dean’s Org should be routed after the CEOAS Proposal Team, not in the same queue order
Proposal Reminders

- Updating Cayuse Budget tab with new indirect rates:
  - Expand indirect cost screen which will display a box where manual rates can be entered
  - CEOAS proposal team can complete this screen for you if you prefer to leave it blank

Select arrow and drag down
Grants

• How CEOAS Grant Accountants can help?
  • Grant spend planning
  • Assist with labor forecasting
  • Re-budget requests
  • No Cost Extension Requests
    • New OPAS form
  • Labor & Non-labor corrections
  • Setting up a pending index

• Email: grants@coas.oregonstate.edu
Grants Reporting (GRRS)

- Grants Reporting (GRRS)
  - Award Document
  - Proposal Document
  - View Transactions
  - View Labor by index

All corrections labor & non-labor must be made within 90 days.

How often do you check your GRRS?
GRRS Continued

Website: oregonstate.edu/budget

Login using ONID username & password!
# OSU Research Office of Budget and Fiscal Planning

## GRANT INDEX SUMMARY

**Report Date:** 4/1/2012 through 8/4/2015  
**Last Closed Period:** June

### As Of 8/4/2015 Available Balances: $18,950.68

<table>
<thead>
<tr>
<th>Category</th>
<th>Budget</th>
<th>Beginning Balance as of Jul 1</th>
<th>Actual Inception-to-Date</th>
<th>Current Balance</th>
<th>Encumbrance</th>
<th>Paid &amp; Non-FES Encumb</th>
<th>Projected Balance</th>
<th>Over Encumb</th>
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<tr>
<td>Salaries/OPE</td>
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<td>- Student Pay</td>
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<td>(27,990.00)</td>
<td>0.00</td>
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<td>(27,990.00)</td>
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<td>- Staff Ass/Res/Phys/Dent/OH</td>
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<td>- Supplies Expense</td>
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<td>17,146.33</td>
<td>17,146.33</td>
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<tr>
<td>- Subtotal Services &amp; Supplies Expense</td>
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<td>17,146.33</td>
<td>17,146.33</td>
<td>17,146.33</td>
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<td>0.00</td>
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<td>27,083.99</td>
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| Projected F&A Costs | 8,553.31 |

| Projected Available Balance | $18,950.68 |

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**Grant Document**  
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<td>Grant N027660 Proposal</td>
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## FY '16 Labor Distributions

**Forecast Labor Distribution for Fiscal Year 2016**

Please fill out the matrix below and return to Erica Dodson by the due date.

If you would like help with this form, please contact Erica Dodson at edodson@ceoas.oregonstate.edu

**DUE DATE: August 14, 2015**

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</tbody>
</table>

| Total | | | | | | | | | | | | | |

"Total must equal 100% for each column regardless of FTE. I authorize the above labor distribution."

**Directions**

1. Click in cell F14 and choose your name from the drop down list.
2. Line 19 - fill in the percentage of college support you receive each month.
3. In the Index column, click on the first blue-shaded cell and select an index you would like to use for some or all of your charges.
4. Continue filling the blue cells with the indexes you plan to use for FY 16.
5. If the index you want to use is not present in your drop-down list, type the missing index(es) in the gray-shaded cells in the Index column.
6. For each index row, insert the percentage you would like charged to that index for each month.
7. Select once AT-OUT and click the print. Choose "Print Selection" from the settings list.
8. Sign the form and return to 104 CEOAS admin bldg. Attn: Erica Dodson.
9. If you're unable to return a hard copy, please send back the completed form via email with the following statement in the body of the email: "I authorize the attached labor distribution for Fiscal Year 2016."

**PI Signature**

Date
## FY ‘16 Labor Distributions Continued

<table>
<thead>
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<th><strong>Only Complete Following Section for Employees Listed</strong></th>
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<tbody>
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<td><strong>Please select</strong></td>
<td><strong>If Index is not listed add in grey shaded cell</strong></td>
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<tr>
<td>PI Name</td>
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<tr>
<td>Employee</td>
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<tr>
<td>Total</td>
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</tbody>
</table>

**Total must equal 100% for each column regardless of FTE**

<table>
<thead>
<tr>
<th><strong>Please select</strong></th>
<th><strong>If Index is not listed add in grey shaded cell</strong></th>
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</thead>
<tbody>
<tr>
<td>PI Name</td>
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<td>Total</td>
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</table>

**Total must equal 100% for each column regardless of FTE**  
I authorize the above labor distribution.  
PI Signature:  
Date:  