

Creating and Managing Gifts in RAPID

Monetary and Equipment Gift Acceptance Package

All Monetary and Equipment Gifts to the Laboratory are reviewed and accepted using the RAPID Proposal Pages.

Gift Setup: The Sponsored Projects Contracts Officer is responsible for the review Gift data entry in RAPID and entering the Gift acceptance data into RAPID.

1. Setting up the Donor:
 - A. If the Donor is not setup in the RAPID Sponsor Table, the SPO Gift Coordinator has the Donor set up following the Sponsor Setup Process
2. Proposal Header
 - A. Enter Proposal Header

The screenshot shows the 'Maintain Proposal' form in the RAPID system. The form is titled 'Maintain Proposal - Microsoft Internet Explorer' and displays various fields for proposal details. The 'Header' tab is selected, showing fields for Proposal ID (MONETARY GIFT EXAMPLE), Business Unit (LBNL), Submit Status (Not Submitted), Version ID (PHG), Currency (USD), and Description (Monetary Gift). Other fields include Due Date (10/19/2005), Type, Time, Time Zone, PI ID (358803), Name (Weiner, Jeffrey), Title (Monetary Gift Example for Modling), Sponsor ID (PI650), INTEL CORPORATION, Status (Draft), Start Date (11/01/2005), End Date (12/31/2010), Purpose (GIFTS), and Confidence. There are also sections for 'Additional Attributes' and 'Additional Information'.

1. Proposal Type: Select either "New Gift" and "Follow on Gift"
2. Proposal Purpose Code: Select either "GIFTS" for Monetary Gifts or "EGIFT" for Equipment Gifts

3. Proposal Project

A. Enter the Proposal Project as outlined in the

Menu

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Header | **Projects** | Resources | Reports | Documents | Certification | Key Words

Proposal ID: MONETARY GIFT EXAMPLE Business Unit: LBNL PI Name: Weiner, Jeffrey
Version ID: PHG
Title: Monetary Gift Example for Modling

Proposal Project Find | View All First 1 of 1 Last

Proposal Project ID: MONETARYGIFT Primary Project: [+ -]

*Title: Monetary Gift Example for Modling Description

*Institution: UCLawrence Berkeley Nat'l Lab

*Subdivision: Life Sciences

*Department: Life Sciences

Dept Contact: Johansen, William E

Dept Rep: Gray, Joe W

Department Cost Share Find | View All First 1 of 1 Last

Department	Total %	Cost Share %	Location
Life Sciences	100.00	100.00	

Save | Return to Search | Notify | Previous tab | Next tab | Add | Update/Display

1. Project ID: Enter a Division designated Project ID for a Monetary Gift or "EQUIPMENTGIFT" for an Equipment Gift.
2. The title should be the same as in the Proposal Header Panel
3. Institution ID is always UC/Lawrence Berkeley Nat'l Lab since the gifts are to the University of California/Lawrence Berkeley Nat'l Lab.
4. There is one Project per award because each gift is usually processed separately.

4. Proposal Reports

A. Enter the Proposal Abstract

The screenshot displays the 'Maintain Proposal' web application in Microsoft Internet Explorer. The browser address bar shows the URL: https://fmsrv2.lbl.gov:8201/psp/fmsbox/EMPLOYEE/ERP/cj/ESTABLISH_PROPOSAL_GM_PROPOSAL_GBL. The page features a blue header with navigation tabs: 'Header', 'Projects', 'Resources', 'Reports', 'Documents', 'Certification', and 'Key Words'. The 'Reports' tab is active. The main content area shows proposal details: 'Proposal ID: MONETARY GIFT EXAMPLE', 'Business Unit: LBNL', 'PI Name: Weiner, Jeffrey', 'Version ID: PHG', and 'Title: Monetary Gift Example'. Below this is a 'Proposal Project' section with 'Proposal Project ID: MONETARYGIFT' and 'Monetary Gift Example'. A 'Report Detail' section is open, showing 'Report Type: Abstract' and a text area for 'Comments' containing the text: 'Gifts require a concise scientific statement regarding the intended use of the gift.' At the bottom of the page are buttons for 'Save', 'Return to Search', 'Notify', 'Previous tab', 'Next tab', 'Add', and 'Update/Display'. A left-hand menu contains various navigation options like 'Proposals', 'Awards', and 'Institutions'. The Windows taskbar at the bottom shows the 'start' button and several open applications.

1. Purpose of the Gift: Enter the purpose of the Gift under the Abstract Report Type in the Reports Panel. It must reflect the purpose outlined in the Donor's Letter.

5. Proposal Documents

A. Donor Letters and other documents can be attached to the Gift.

Maintain Proposal - Microsoft Internet Explorer

Address: https://fmsrvd2.lbl.gov:8801/psp/fmsbox/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL.GM_PROPOSAL.GBL

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Header | Projects | Resources | Reports | **Documents** | Certification | Key Words

Proposal ID: MONETARY GIFT EXAMPLE Business Unit: LBNL PI Name: Weiner, Jeffrey
Version ID: PHG
Title: Monetary Gift Example for Modling

Proposal Project ID: MONETARYGIFT Monetary Gift Example for Modling

Attachment	Attached File
1	

Save | Return to Search | Notify | Previous tab | Next tab | Add | Update/Display

Header | Projects | Resources | Reports | Documents | Certification | Key Words

6. Proposal Certifications

The screenshot shows a web browser window titled 'Maintain Proposal - Microsoft Internet Explorer'. The address bar displays the URL: https://fmsrv2.lbl.gov:8201/psp/fmsbox/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL_GM_PROPOSAL.GBL. The page content includes a navigation menu with tabs for Header, Projects, Resources, Reports, Documents, Certification, and Key Words. The 'Certification' tab is active, showing the following details:

Proposal ID: MONETARY GIFT EXAMPLE **Business Unit:** LBNL **PI Name:** Weiner, Jeffrey
Version ID: PHG
Title: Monetary Gift Example

Proposal Project Find | View All First 1 of 1 Last

Proposal Project ID: MONETARYGIFT Monetary Gift Example

Certification Customize | Find | First 1 of 4 Last

Certification Info | Review and Status

Certification Code	Certification Date	Indicator	Certified By	Approval Date	Assurance Number	Exemption Number	
AN		Pending					+ -
COI		Pending					+ -
HS		Pending					+ -
NEPA		NEP Pndng					+ -

1. Certification Panel: Complete Animals, Conflict of Interest, Human Subjects, and NEPA/CEQA Certifications Review.
2. DOE approval of a gift is not required.
3. Certifications must be completed and all the issues resolved prior to the acceptance of the Gift.

9. Budget Header and Periods

Enter Overall Budget - Microsoft Internet Explorer

Address: https://fmsrsvd2.lbl.gov:8801/psp/fmsbox/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL.GM_BUD_HEADER.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_GRANTS.EPGM_P

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General Info | **Periods**

Proposal ID: MONETARY GIFT EXAMPLE **Currency:** USD
Version ID: PHG **Start Date:** 11/01/2005 **End Date:** 12/31/2010
Title: Monetary Gift Example for Modling
PI: Weiner, Jeffrey

Project ID: MONETARYGIFT **Department:** Life Sciences

Details Find | View All First 1 of 1 Last

Include in Proposal

Budget ID: MONETARY GIFT **Description:** Gift

Target Sponsor Budget: 500,000.00 **Start Date:** 11/01/2005 **End Date:** 12/31/2010

Waived FA Calc Method

Institution Minus Funded
 Sponsor Minus Funded [Facility and Admin Set Up](#)

Save | **Return to Search** | **Notify**

[General Info](#) | [Periods](#)

1. Target Sponsor Budget: Enter the same value as in the Donor Letter (or check) or Enter the value of the Equipment Gift

Periods

The screenshot displays a web application interface for entering budget periods. The browser window is titled "Enter Overall Budget - Microsoft Internet Explorer". The address bar shows the URL: https://fmsrvd2.lib.gov:8801/psp/fmsbox/EMPLOYEE/ERP/c/ESTABLISH_PROPOSAL_GM_BUD_HEADER.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_GRANTS.EPGM_P. The page has a menu on the left and a main content area with tabs for "General Info" and "Periods". The "Periods" tab is active, showing a table with one row of budget data.

General Information

Proposal ID: MONETARY GIFT EXAMPLE Currency: USD
Version ID: PHG Start Date: 11/01/2005 End Date: 12/31/2010
Title: Monetary Gift Example for Modling
PI: Weiner, Jeffrey

Project ID: MONETARYGIFT Department: Life Sciences

General Information Find | View All First 1 of 1 Last

Budget ID: MONETARY GIFT Start Date: 11/01/2005 End Date: 12/31/2010 + -

Description: Gift

Target Sponsor Budget: 500,000.00

Details Customize | Find First 1 of 1 Last

Period	*Start Date	*End Date	Target Sponsor Budget	
1	11/01/2005	12/31/2010	500,000.00	Program Income + -

1. End Date field: Enter the end date which is the entire period of the gift.
2. Target Sponsor Budget: Enter the entire Gift value whether monetary or an equipment donation.

10. Budget Line Summary

- A. A single line entry in the Budget Line Summary panel is required to record the valuation of either a monetary or equipment gift.

Enter Budget Detail

Proposal: MONETARY GIFT EXAMPLE **Currency:** USD
Version: PHG **Start Date:** 11/01/2005 **End Date:** 12/31/2010
Title: Monetary Gift Example for Modling **Modular?**

Project ID: MONETARYGIFT **Budget Period:** 1 [Overall Cost Share](#)
Budget ID: MONETARY GIFT **Start Date:** 11/01/2005 **End Date:** 12/31/2010 [View FA Rate](#)
Target Sponsor Budget: 500,000.00

Details, CostShare, Justification Customize | Find | First 1 of 1

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Institution Cost Share	Third Party Cost Share
10	GIFT	UCOP Gifts for Use at LBN		500,000.00	500,000.00	Cost Share		

Sponsor Direct: 500,000.00 **Sponsor F&A:** 0.00 **Total Sponsor Budget:** 500,000.00
Institution Cost Share: 0.00 **Institution Cost Share F&A:** 0.00 **Total Inst C/S Budget:** 0.00
Third Party Cost: 0.00 **Total TP C/S Budget:** 0.00

1. Budget Category: Enter "GIFT" or "EGIF"
2. Total Direct: Enter amount of the gift or the valuation of the equipment donation.

10. Proposal Review Factors

The list below reflects the required Proposal Review Factors that are required for a Gift. (Required entries are **bolded**)

A. DOE Review Factors: There are several DOE Review Factors that must be completed for Gifts, whether monetary or equipment.

- DOE Uniqueness**
- Work with/in Mission**
- No Adverse Impact**
- No Detrimental Future Burden**
- Human/Animal Involvement**
- Building Modification/Construction**

B. IP Review Factors: Do Not Complete

C. COI Review Factors: Complete the Review Factors for NonFederal Sponsors

D. NNP Review Factors: Do Not Complete

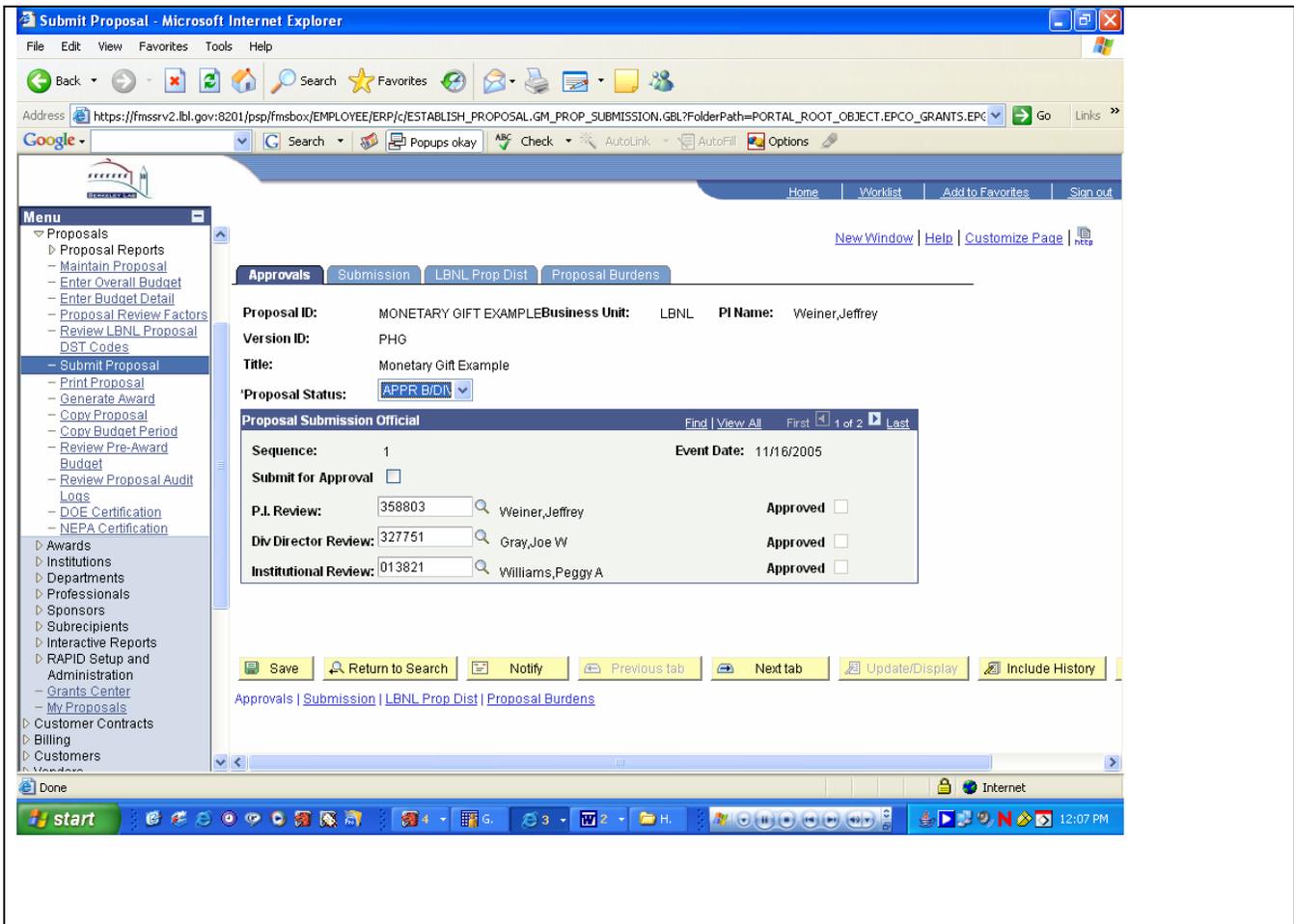
E. NEPA/CEQA Review Factors: Complete the Review Factors

F. Related B&R Codes:

G. Proposal Burdens: Complete

H. Proprietary Information: Do Not Complete

11. Proposal Submission/Approvals



1. Proposal Status: Select APPR B/DIV as the status and the Gift is ready for SPO review.