Biosketch and Other Support (BSOS) Help Guide

Contents

Introduction to the BSOS

The Biosketch and Other Support (BSOS) application, available via access.caltech.edu, is designed to collect information from various Caltech systems to aid researchers (principal investigators, senior and key personnel) in completing Biosketch and Other/Current and Pending/In-kind support documents that federal sponsors require in proposals and annual reports. The BSOS is not intended to be a definitive source for this information, but rather it attempts to gather what information Caltech has available in its system that might be helpful in meeting sponsor requirements.

From the Disclosure of Financial Interests and Commitments (DFIC), commonly referred to as the COI Disclosure, the BSOS collects any commitments or appointments that should be reported in a researcher's Biosketch, and any financial interests or collaborative relationships that could be interpreted as Other Support by the federal agency sponsors. Additions or deletions of Entities in the Biosketch or the Other Support sections derived from the DFIC, must be done by the researcher in their DFIC and cannot be done in the BSOS.

One section of Other Support is fully editable (additions and deletions allowed) and there is functionality for researchers or their designees to add sources of other or in kind support that are not included in the BSOS extract of the researcher's financial interests or commitments from DFIC. This section also allows researchers or their designees to upload an Excel spreadsheet in order to batch-load collaborators or other sources of support, rather than entering them one-by-one.

Other Caltech financial systems provide the researcher's sponsored grants, contracts and gifts, any Caltech accounts that the researcher charged time to in the last year, and any external funds that postdocs in the researcher's lab may receive.

Researchers should review the information that is provided in the application and decide which components should be disclosed to their sponsor.

The BSOS application allows the researcher to designate personnel on campus who can view their information. It is recommended that each researcher designate their Division Operations Officer and their Grant Manager so that they can assist the researcher in creating their Biosketch and Other/Current & Pending/In-Kind Support for submission. If the researcher is a co-investigator, postdoc or research staff member, it is recommended that they also designate their PI/supervisor so that any information in the application can be incorporated into their PI's Other Support, as necessary. Designees are also able to edit certain sections in the BSOS.

Researchers should also know that the information in the BSOS is viewable by certain authorized departments on campus (e.g. Office of Research Compliance) for business purposes.

Helpful Considerations for Navigating the BSOS Guide

The table below provides a list of shortcuts for navigating to specific areas of the BSOS guide. This table also includes a list of considerations for appointment types, financial interest, outside programs/activities and other support.

Consideration	BSOS Section	Biosketch	OS/In-Kind
Outside Affiliations & Appointments - Paid & Unpaid. This includes unpaid Appointments such as "guest", "adjunct", "honorary", or "visitor" titles.	• Biosketch • Other Support: DFIC	X	X
Outside Research Roles – Any activity with another institution where you are identified as the PI, Co-PI, investigator, or other key personnel on a project (proposed or awarded). (Do not include proposals or awards processed through Caltech or Caltech subcontracts)	• Biosketch • Other Support: DFIC	X	X
Outside Programs & Activities - Non-Caltech program or activity that provides you with compensation, research or office facilities, sponsored or reimbursed travel, honorary funding, or any type of benefit in exchange for teaching or mentoring students, performing research for another institution, or publishing research results naming your affiliation at the other institution	• Other Support: DFIC • Other Support: Other and In-kind (Editable)		X
Personal Financial Interest - Have you received any Personal Financial Interest (e.g., salary, consulting fees, stock/stock options, honoraria, gifts, or sponsored or reimbursed travel) from a Caltech entity that will be used to support your Caltech research endeavors?	• Other Support: DFIC		X
In-Kind - Any **"in-kind" resources** in support of your research endeavors that are obtained through a collaboration, appointment, or relationship with an outside institution, organization, or company ("Entity")	• Other Support: DFIC • Other Support: Other and In-kind (Editable)		X
PD and Students - Any **Caltech postdoctoral fellows or students** involved in research for your lab supported in full or in part by any external (non-Caltech) organization, institution, company, or government ("Entity") including fellowships	• Other Support: Externally Funded Postdoctoral Fellows • Other Support: Other and In-kind (Editable)		X
Visitors - Any **visiting postdoctoral fellows, visiting students, or visiting scholars** involved in research in your lab who are paid directly, in full or in part, by any Caltech organization, institution, company or government ("Entity")	• Other Support: Externally Funded Postdoctoral Fellows • Other Support: Other and In-kind (Editable)		X
"Traditional" Other Support – Grants, Contracts, **Gifts** used for Research, **Postdoctoral Fellowships**	• Other Support: Caltech Grants, Contracts, Gifts • Other Support: Federal Awards from which you have been paid		X

Navigating the BSOS: Researcher Homepage

"You" or "Your" throughout this guide refers to the Researcher. "You" or "Your" throughout this guide refers to the Researcher. When you open the application, this is your view. You can look at your own BSOS Report by selecting "My Biosketch and Other Support."

1. Select "My Biosketch and Other Support" to view your own Biosketch and Other Support Information.
2. These individuals have designated you to view and modify their BSOS. If you select the underlined name, you will be taken to this individual's BSOS. As a general rule, postdoc researchers and research staff should designate the PI and the PI's grant manager.
3. The Offices of Sponsored Research, Research Compliance and General Counsel, as well as your Division Operations Officer can view your BSOS Report by default. Any additional personnel you wish to have access must be designated by you. (See Designating Viewers) This is a list of those individuals whom you have designated.

Researchers: Designating a Viewer

Caltech | Biosketch and Other Support

Home	Admin

My BSOS Information

My Biosketch and Other Support

People Who have Designated You

These individuals have designated you to view and modify their BSOS Reports:

Designator ↑≡	Start Date	End Date
Robinson, Patrice	04/04/2022	04/30/2022

1 - 1

People Whom You have Designated

The Offices of Sponsored Research, Research Compliance and General Counsel, as well as your Division Operations Officer can view your BSOS Report. You have designated the following individuals to view and modify your BSOS Report:

Full Name	Start Date	End Date
Jones, Sally	04/05/2022	04/30/2022
Davis, Christopher	04/05/2022	04/30/2022

Designated Viewers

A

From your Homepage:

My Designee(s)   ✕

Adding Designee

Create Designees

Designee: * [▼]

UID:

Person Type:

Start Date: [   ] 🔳 **1**

End Date: [   ] 🔳 **2**

                              3

List of Designees

Delete Designee(s)

Delete	Full Name	UID	Person Type	Start Date	End Date
-	-	-	-	-	-

1 - 1

My Designee(s)   ✕

Create Designees

Designee: * [▲]

UID: [   ]

Person Type:

Start Date: Albertson, Sally (000123 – Academic Faculty)

End Date: Benson, Craig (000456 – Staff)   **1**

                Charleston, Betty (000987 – Research Staff)

List of Designees

Delete Designee(s)

Delete	Full Name	UID	Person Type	Start Date	End Date
-	-	-	-	-	-

1 - 1

You can create or delete designees by Selecting A "Designated Viewers." A pop-up window opens entitled "My Designee(s)."

Adding/Creating a Designee

1. Select a name from the Designee list (from Caltech Directory) It is recommended that you designate:
   a. DOO
   b. Grant Manager
   c. PI (if not the PI)
2. Enter a "start date" for the Designee's access
3. Enter an "end date" for the Designee's access
4. Select the "Save" button at the top right
5. The Designee appears in the list.

Deleting a Designee

1. Check the box next to the name of the designee to delete.
2. Select the "Delete Designee(s)" button at the top right.

6
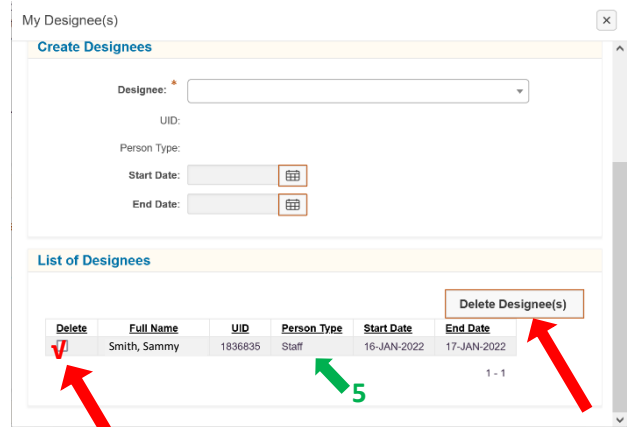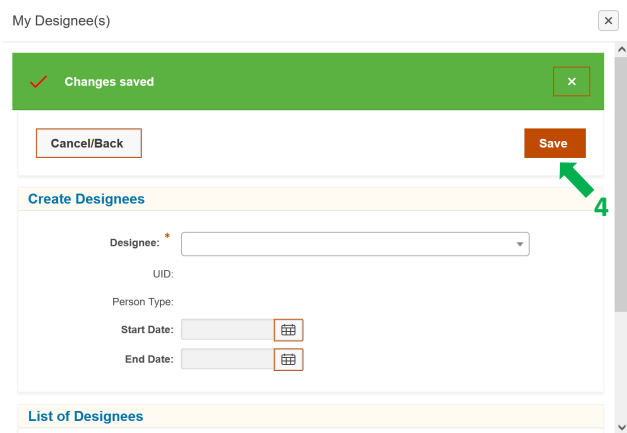
1. To Delete   2. To Delete

Navigating the BSOS: Administrator Homepage

When an Administrator opens the application, this is the view.
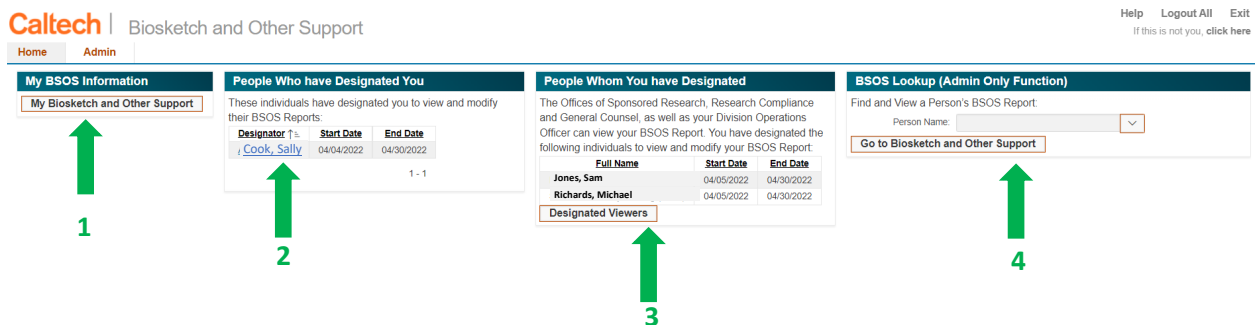
1. Will show Administrator's BSOS. (Unless Administrator is also a Researcher there will be nothing in the BSOS.)
2. These Researchers have designated the Administrator to view and modify their BSOS. If the Administrator/Designee selects the underlined name, they will be taken to the named individual's BSOS.
3. The Offices of Sponsored Research, Research Compliance and General Counsel, as well as Researcher's Division Operations Officer can view all Researchers' BSOS Reports. If any other Administrator (such as a grant manager) wishes to have access, a Researcher must designate the Administrator. If the Administrator chooses to designate a viewer, it will only grant access to the Administrator's BSOS (i.e. likely blank)
4. (Not Available for All) OSR, ORC, OGC, DOO (Division Only)

Navigating the BSOS: The BSOS Report

The first section includes a description of the application:

> **Biosketch and Other Support for**
>
> This Biosketch and Other Support (BSOS) application is designed to collect other support information in one place to aid you in creating your biosketch and other/current and pending support documentation for federal sponsors. You should review the information that is provided here and decide which components should be provided to your sponsor. The BSOS application also allows you to designate personnel on campus who can view this information. It is recommended you designate your Division Operations Officer and your Grant Manager so that they can assist you in creating your Biosketch and Other Support for submission. If you are a co-investigator, postdoc or research staff member it is also recommended that you also designate your PI/supervisor so that any information you see here can be incorporated into your PI's other support, as necessary. The information on this page is also viewable to certain authorized organizations on campus for business purposes.
>
> You can designate individuals to view this report. Some sections can also be edited by your designated viewer.
>
> **Designated Viewer(s)**   **Cancel**

Biosketch

The Biosketch information is gathered from your annual Disclosure of Financial Interests and Commitments (DFIC, formerly known as the COI Disclosure). These are commitments or appointments disclosed by you.

If there are items missing from your Biosketch (other than your affiliation with Caltech), these should be entered in the DFIC as a commitment by you. The BSOS will automatically update after the DFIC information is entered and submitted.

BIOSKETCH

The Entities shown here are Entities from your DFIC disclosure that could be reportable as part of your Biosketch.
If you need to add Entities to or delete existing Entities from this Section, you MUST do so through the Disclosure of Financial Interests and Commitments (DFIC) system. While your DFIC is in "Draft" status, Entities entered into the DFIC application will not appear here. While you cannot add Entities here, you can add foreign agreements or indicate whether you'd like to include an entity on your biosketch by selecting yes or no.

Here is a list of your entities that may belong in your Biosketch.

Include in Biosketch	Include By Person	Entity	Country	Title	Time Committed	Type Of Commitments	Foreign Agreements
Yes	-	Robotics, Inc.	United States	Consultant	2 days/year	I have worked as a paid or unpaid consultant for this person/entity	Attachments (0)
Yes		UTOPIAN	Singapore	Honorary Professorship	No time during 2020-2021 due to COVID pandemic; when the pandemic lifts, I would anticipate traveling to Singapore for approximately 2 weeks/year.	I have an academic or research appointment at this entity	Attachments (0)
Yes	-	Fisher Instruments	United States	Captura Corporation: co-Founder, shareholder and unpaid consultant	0.5 day/week	I have worked as a paid or unpaid consultant for this person/entity	Attachments (0)

1 Selection

Export Biosketch to Excel

2 Exporting

To View, To Add, To Delete, To Confirm Review Status
Foreign Agreements   **1**

Identifying Key Items and Exporting to Biosketch to Excel
(Yellow Arrows):

1. Use Yes/No Selection to Identify Entity Activities to include in Biosketch (Note: The person who changes the flag to include or not include an Entity in the BSOS will be listed in the 'Include by Person' column. By default, this column is blank).
2. Click on the "Export to Excel" Hyperlink and follow instructions to export list to Excel.

Biosketch and Other Support - Attachments

Attachments

These are agreements with <u>foreign entities</u> that document the your obligations with the Entity (e.g. a contract or MOU)

View (Blue Arrows):

1. Click on the "Attachments" hyperlink.
2. Click on the hyperlinks to the Filename of agreement you want to read.

Add (Green Arrows):

1. Click on the "Attachments" hyperlink
2. Choose Browse and select File from your computer or cloud storage
3. Click on "Attach File"

Delete (Red Arrows):

1. Click on the "Attachments" hyperlink
2. Check the "x" in the Attachment Delete column.
3. When pop-up comes up, Are you sure you want to remove this file? Select "OK".

Attachment Review Status (Purple Arrow):

1. Click on the "Attachments" hyperlink
2. Review Status is "Pending" as default
3. After Institute Review, final Status will show. Approved. Can be released from Caltech. Not Approved. Cannot be released from Caltech. Contact ORC.

Other Support

The Other Support section of BSOS is broken into subsections:

1. Other Support Related to Your Financial Interests or Commitments Outside of Caltech (Partially Editable)
2. Other Support and In-Kind Support (Editable)
3. Other Support: Caltech Grants, Contracts and Gifts
4. Other Support: Caltech Awards from which You Have Been Paid
5. Other Support: Externally Funded Postdoctoral Fellows

Each of these sections is described below. The information from *each section* can be downloaded into an Excel spreadsheet. Currently, there is no functionality to download all sections into one spreadsheet.

When completing Other Support or Current and Pending Support documents for federal proposals, please make sure to include the information in the format required by the sponsor. Links to federal sponsor requirements can be found at https://researchcompliance.caltech.edu/international_collaboration/federal-agency-requirements.

Note that sponsors may require disclosure of information that is not yet available in BSOS. For example, BSOS does not track external Graduate Student funding or resources provided by or funding to support Caltech visiting researchers. Please ensure that all sources of Other Support, as required by sponsor, are disclosed.

Other Support Related to Your Financial Interests or Commitments Outside of Caltech (Partially Editable):

This data comes from the your DFIC disclosure. It is a financial interest or a commitment you disclosed where you have indicated that you are receiving some form of other or in-kind support from this Entity or Individual. If there is an entity or individual with which you have a formal commitment or financial interest and is getting some form of Other Support, you must return to the DFIC and disclose the commitment or financial interest in the system.

This section is only partially editable in that an Entity/Individual in this section can only be added through the DFIC. In the BSOS, you or your designee can add additional information that federal sponsors may require, but which Caltech did not require be disclosed in DFIC.

Other Support (related to your Financial Interests or Commitments Outside of Caltech)

The Entities shown here are Entities from your DFIC disclosure that may have provided you with financial or in-kind support that may be reportable as Other/Current and Pending Support to a federal sponsor in a proposal or annual report.
If you need to add Entities or Delete Existing Entities from this Section, you MUST do so through the Disclosure of Financial Interests and Commitments (DFIC) system. While your DFIC is in "Draft" status, Entities entered into the DFIC application will not appear here. You can add information to each row by clicking on the name of the Entity hyperlink. Attachments must be added by selection Attachments.

Here is a list of your entities that may be providing Other Support directly to you.

Include in Other Support	Include By Person	Entity	Collaborator	Country	Title	Description	Time Committed	Value	Support Status	Start Date	End Date	Primary Place of Performance	Type of Commitments	Major Goals	Overlap	
Yes	-	ABC Inc.	-	China	Quantification for Machine Learning	Collaboration with Professor Smith and Professor Jones on machine learning	At most one hour weekly zoom meetings, starting January 2022.	$0	-	-	-	-	Scientific advice and performing research	-	-	-

Export Other Support to Excel

Exporting Other Support: DFIC Related

Add Other Support ✕

| Cancel/Back | Delete | Save |

3 Save additional information

Edit: Add Information

Entity *   ABC Inc.
Collaborator   Prof. Smith; Prof. Jones
Country *
Title *   Quantification for Machine Learning

Description
Time Committed *   At most one hour weekly zoom meetings, starting January 2022.
Value *
Status of Support

2 Add additional Other Support information

Start Date
End Date
Primary Place of Performance (Name)
Type Of Commitment (e.g. Collaboration, Research, Advising)   I have provided scientific advice or performed research for this foreign entity
Major Goals
Overlap with Proposed Work
Comments

Edit (Add Information):

1. Click on the Entity Name hyperlink.
2. Add additional information: Collaborator Name (Person), Description, Status of Support (Active, Pending), Start Date (of Other Support), End Date (of Other Support), Place of performance (Name of Institution), Type of Commitment, Major Goals, Overlap with Proposed Work (i.e. work in the proposal for which this is the o\Other Support document), and any Comments.
   Note: Not all this information may be relevant or required. Include as much as is needed for proper sponsor disclosure.
3. Click "Save"

ADD Foreign Agreement Attachment
See below.

Identifying Key Items and Exporting to DFIC Other Support to Excel
(Yellow Arrows):

1. Use Yes/No Selection to Identify Entity Activities to include in Other Support
2. Click on the "Export to Excel" Hyperlink and follow instructions to export list to Excel.

Other and In-Kind Support (Editable): This section of Other Support is for entering Other Support from entities or collaborators where you have no formal commitment or financial interest. This information can be entered three different ways: (1) Add in DFIC, (2) Add in BSOS, (3) Add by uploading a spreadsheet.

NOTE: If there is a formal commitment or financial interest, you must return to the DFIC and disclose the commitment or financial interest in the system. Because the list of entities or individuals in this section may be extensive, there is an option to fill out an Excel worksheet template and send it to caltechcoi@caltech.edu and request that the spreadsheet be uploaded.

Other Support and In-Kind Support (Editable)

Use this section to add Other Support or In-Kind Support that is not Caltech Support (see below for Grants, Gifts, Fellowships) or Other Support related to your Financial Interest or Outside Commitments (see above)

It may be helpful to upload more than one Other Support entry at a time. Your or your designee can enter entities in an Excel spreadsheet template and email it to Caltech's Office of Research Compliance where the data will be uploaded into your BSOS.

Please download the Excel spreadsheet template found at: https://researchcompliance.caltech.edu/documents/20522/Other_Support_Worksheet_Dec_2021.xlsx

Fill in the spreadsheet save with a filename that indicates researcher name and email the file to caltechcoi@caltech.edu.

[Add Other Support]   **1 Add**

Other or In-Kind Support   [×]

[Cancel/Back]   [Save]

3 Add/Save

Other Support

Field	
Entity *	
Collaborator	
Country *	
Title *	
Description	

2 Add

Field	
Time Committed *	
Value *	
Status of Support	
Start Date	
End Date	
Primary Place of Performance (Name)	
Type Of Commitment (e.g. Collaboration, Research, Advising)	
Major Goals	
Overlap with Proposed Work	
Comments	

Add Other or In-Kind Support (Green Arrows):

1. Click on the "Add Other Support" button.

2. Add information: Entity, Collaborator Name (Person), Country, Title or Project or Support, Description, Time Committed, Value (if known), Status of Support (Active, Pending), Start Date (of Other Support), End Date (of Other Support), Place of performance (Name of Institution), Type of Commitment (e.g. consulting, collaborating, etc.), Major Goals, Overlap with Proposed Work (i.e. work in the proposal for which this is the Other Support document), and any Comments.

3. Click on the "Save" button.

   Note: Not all this information may be relevant or required. Include as much as is needed for proper sponsor disclosure.

ADD Foreign Agreement Attachment
See below.

Add Other or In-Kind Support (Upload):

It may be helpful to upload more than one Other Support entry at a time. Often you may have a list of collaborators or potential persons with conflicts of interest for review purposed. It may be helpful to have these entered in as possible Other Support in one location. This section can accommodate this.

Please download the Excel spreadsheet template found at:
https://researchcompliance.caltech.edu/documents/20522/Other_Support_Worksheet_Dec_2021.xlsx

Fill in the spreadsheet save with a filename that indicates your name and email the file to caltechcoi@caltech.edu. Personnel in the Office of Research Compliance will upload this information to the BSOS.

Screenshot of Spreadsheet:
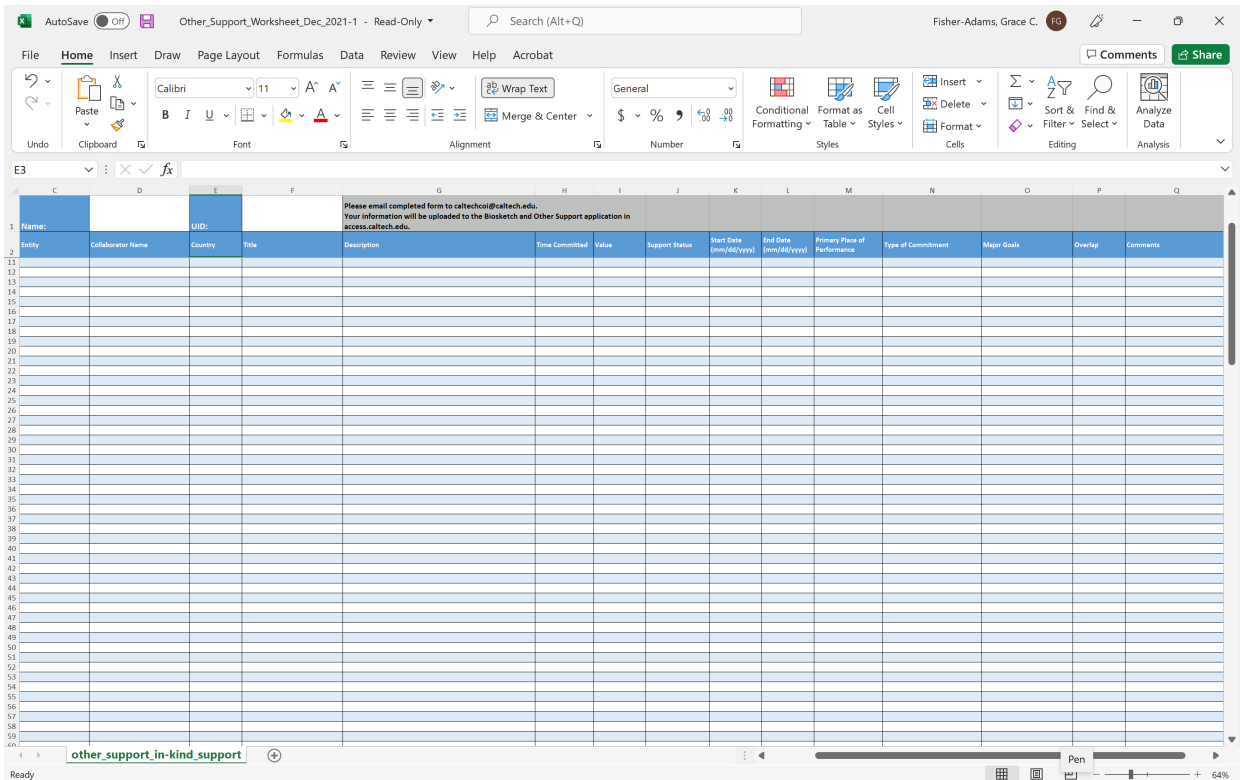
Identifying Key Items and Exporting to Other and In-Kind Support to Excel
(Yellow Arrows):

1. Use Yes/No Selection to Identify Entity Activities to include in Other Support
2. Click on the "Export to Excel" Hyperlink and follow instructions to export list to Excel.

Additional Possible Other and In-Kind Support (Editable)

Use this section to add Other Support or In-Kind Support that is not Caltech Support (see below for Grants, Gifts, Fellowships) or Other Support related to your Financial Interest or Outside Commitments (see above)

It may be helpful to upload more than one Other Support entry at a time. Your or your designee can enter entities in an Excel spreadsheet template and email it to Caltech's Office of Research Compliance where the data will be uploaded into your BSOS.

Please download the Excel spreadsheet template found at: https://researchcompliance.caltech.edu/documents/20522/Other_Support_Worksheet_Dec_2021.xlsx

Fill in the spreadsheet save with a filename that indicates researcher name and email the file to caltechcoi@caltech.edu.

Add Other Support

Include in Other Support ↑≟	Include By Person	Entity	Collaborator	Country	Title	Description	Time Committed	Value	Support Status	Start Date	End Date	Primary Place of Performance	Type of Commitments	Major Goals	Overl
Yes	-	University of Berlin	Professor Julius	Germany	Reader	Collaborator on project	-	-	-	01-JAN-22	31-DEC-24	-	-	-	-
Yes	-	EPFL	Professor Lennox	Switzerland	Professor	Co-author on paper	-	-	-	06-JUN-21	-	-	-	-	-
Yes	-	University of Berlin	Professor Julius	Germany	Assistant Professor	Co-author on paper	-	-	-	01-AUG-17	-	-	-	-	-
Yes	-	Columbia University	Professor Alvin	United States	Assistant Professor	Co-author on paper	-	-	-	24-AUG-20	-	-	-	-	-

Edit

Selection

Export Biosketch to Excel

Exporting Other Support: DFIC Related

Other or In-Kind Support

Cancel/Back   Delete   Save

2 Delete   **3 Edit/Save**

Other Support

2 Edit All Fields as Necessary

Entity * : Aalto University

Collaborator : Collaborator, Sammy

Country * : Finland

Title * : Associate Professor

Description : Collaborator on project

Time Committed *

Value *

Status of Support

Start Date : 01-MAR-18

End Date : 28-FEB-22

Primary Place of Performance (Name)

Type Of Commitment (e.g. Collaboration, Research, Advising)

Major Goals

Overlap with Proposed Work

Comments

Editing Other or In-Kind Support (Green Arrows):

1. Click on the hyperlink of the Entity you wish to edit.
2. Add/Edit information: Entity, Collaborator Name (Person), Country, Title or Project or Support, Description, Time Committed, Value (if known), Status of Support (Active, Pending), Start Date (of Other Support), End Date (of Other Support), Place of performance (Name of Institution), Type of Commitment (e.g. consulting, collaborating, etc.), Major Goals, Overlap with Proposed Work (i.e. work in the proposal for which this is the Other Support document), and any Comments.
3. Click on the "Save" button

   Note: Not all this information may be relevant or required. Include as much as is needed for proper sponsor disclosure.

Deleting Other or In-Kind Support (Red Arrows):

1. Click on the hyperlink of the Entity you wish to delete.
2. Click on the "Delete" Button

ADD Foreign Agreement Attachment
See below.

Add Foreign Agreement/Attachments to Other Support from DFIC or Editable

OTHER SUPPORT

Other Support (related to your Financial Interests or Commitments Outside of Caltech)

The Entities shown here are Entities from your DFIC disclosure that may have provided you with financial or in-kind support that may be reportable as Other/Current and Pending Support to a federal sponsor in a proposal or annual report.

If you need to add Entities or Delete Existing Entities from this Section, you MUST do so through the Disclosure of Financial Interests and Commitments (DFIC) system. While your DFIC is in "Draft" status, Entities entered into the DFIC application will not appear here. You can add information to each row by clicking on the name of the Entity hyperlink. Attachments must be added by selection Attachments.

Here is a list of your entities that may be providing <u>Other Support</u> directly to you.

Include in Other Support	Include By Person	Entity	Collaborator	Country	Title	Description	Time Committed	Value	Support Status	Start Date	End Date	Primary Place of Performance	Type of Commitments	Major Goals	Overlap	Comments	Foreign Agreements
Yes	-	ABC Inc.	-	Switzerland	None	Collaboration with Professor Smith and Professor Jones on machine learning	At most one hour weekly zoom meetings, starting January 2022.	$0	-	-	-	-	I have provided scientific advice or performed research for this foreign entity	-	-	-	Attachments (3)

Export Other Support to Excel

To View, To Add, To Delete, To Confirm Review Status Foreign Agreements

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Biosketch and Other Support - Attachments   [×]

File Attachment

2 To Add   Close

Novick Biosciences

File to Attach *

Browse... No file selected.

3 Attach

Attach File

3 Pop-up, "OK"

access.ps1.caltech.edu

Are you sure you want to remove this file?

OK   Cancel

Attachment List

2 To View/Read

Attach Filename ↑	Creation Date	Review Status	Reviewed By	Review Date	Delete
CIT_Pending_ABC_123.pdf	02/10/2022 11:59:51	● Pending ○ Approved ○ Not Approved	-	-	×

2 To Delete

1 - 1

Attachments

These are agreements with <u>foreign entities</u> that document the your obligations with the Entity (e.g. a contract or MOU)

View (Blue Arrows):

1. Click on the "Attachments" hyperlink.
2. Click on the hyperlinks to the Filename of agreement you want to read.

Add (Green Arrows):

1. Click on the "Attachments" hyperlink
2. Choose Browse and select File from your computer or cloud storage
3. Click on "Attach File"

Delete (Red Arrows):

1. Click on the "Attachments" hyperlink
2. Check the "x" in the Attachment Delete column.
3. When pop-up comes up, Are you sure you want to remove this file? Select "OK".

Attachment Review Status (Purple Arrow):

1. Click on the "Attachments" hyperlink
2. Review Status is "Pending" as default
3. After Institute Review, final Status will show. Approved. Can be released from Caltech. Not Approved. Cannot be released from Caltech. Contact ORC.

Other Support: Caltech Grants, Contracts and Gifts

Other Support: Caltech Grants, Contracts and Gifts: This section contains "Active" Caltech awards including grants, contracts and gifts where you are named PI, project manager or task manager. If you are responsible for oversight of large institutional awards (e.g. Provost, Vice Provost, Division Chair, Director) this section may have more information than is necessary to report as Other Support.

Other Support (Caltech Grants, Contracts and Gifts)

This section includes Contracts, Grants, and Gifts on which you are an Award Manager, Project Manager, Task Manager or CO-PI.

Details	Attachments	Include in Other Support	Include By Person	Name	Title	Status of Support	Federal Award #	Caltech Award #	Source of Support ↑≡	Primary Sponsor	Start Date	End Date	Total Award Amount	Committed Effort (%)	Note	Person-Months	Primary Place of Performance	Country Performa
🖉	0	Yes	-	Davis, John	Disney Research	ACTIVE	12271	GIFT.DISNEY	CIT GIFTS	Disney Research	01-SEP-11	30-SEP-39	51,857.84	-	Project role Project Manager	-	-	-
🖉	0	Yes	-	Davis, John	System Modeling	ACTIVE	162981	NSF.0001	NATIONAL SCIENCE FOUNDATION	NSF - Nat'l Science Foundation	01-NOV-18	31-OCT-23	2,499,842.00	6.66%()	Award Commitments	-	-	-

1

Export Other Support to Excel

Exporting External Other Support: Contracts, Grants, Gifts

Caltech | Biosketch and Other Support

Help   Logout All   Exit
Welcome **Grace Fisher-Adams**. If this is not you, **click here**

Home   Admin

OGM Additional Information

Person Name: **Beaver, Buchwald**
Award Number: **NSF.000680**
Person Month:
Primary Place of Performance:
Country of Performance:
Major Goals:
Overlap with Proposed Work:
Comments:

Back   Save
3
4

Clear

2

Attachments

Subject
File Name: Browse... No file selected.   **2**
Upload File   **3**

File List

Subject ↑≡   Attachment Name   Delete   Review Status   Reviewed By   Review Date
Save Review Flag

access.ps1.caltech.edu

3 Pop-up, "OK"

Are you sure you want to remove this file?

OK   Cancel

2

File List

Subject ↑≡	Attachment Name	Delete	Review Status	Reviewed By	Review Date
test	Test upload.pdf	✕	○ Pending ○ Approved ○ Not Approved	-	-

4

1 - 1

Editing Other Support: Grants, Contracts and Gifts (Green Arrows):

1. Click on the Pencil 🖉 next to the award you wish to edit.
2. Add/Edit information: Person Months, Place of performance (Name of Institution), Country of Performance, Major Goals, Overlap with Proposed Work (i.e. work in the proposal for which this is the Other Support document), and any Comments.
3. Click on the "Save" button

Export to Excel: Other Support: Grants, Contracts, Gifts

(Yellow Arrow): Click on the "Export to Excel" Hyperlink and follow instructions.

Add Foreign Agreement/Attachment to Grants, Contract, Gifts (Purple Arrows):

1. Click on the Pencil 🖉 next to the award you wish to add an agreement to.
2. Enter a "Subject" (Use the Entity Name)
3. Select "Browse" and select a file from your computer or the cloud.
4. Click on the "Upload File" button.
5. Agreement should show up on the File List. If you click on the hyperlink, you should see the agreement. Make sure you select the "Save" button before navigating away!

<div style="border:1px solid black; padding:10px;">

Delete Foreign Agreement/Attachment from Grants, Contracts, Gifts (Red Arrows):

1. Click on the Pencil ✏ next to the award you wish to delete an agreement from.
2. In the file list, click on the X under "Delete" column
3. Pop-up window comes up. "Are you sure you want to remove this file?" Select "OK"

Attachment Review Status (Pink Arrow):

1. Click on the "Attachments" hyperlink
2. Review Status is "Pending" as default
3. After Institute Review, final Status will show. Approved. Can be released from Caltech. Not Approved. Cannot be released from Caltech. Contact ORC.

</div>

Other Support: Caltech Awards from which You Have Been Paid

Other Support: Caltech Awards from which You Have Been Paid: This section is more narrowly focused than the Grants, Contracts and Gifts section and represents a subset of that section. Specifically, this displays those grant, contract and gift PTAs to which the your time has been charged in the last fiscal year plus the current fiscal year, so far. This list, when compared to the list of grants, contracts and gifts in the previous section, should help provide a better overview of where the you have spent your time to ensure proper disclosure regarding current research funds. This section is not editable, although you can export the information to an Excel spreadsheet by selecting the hyperlink in the lower left corner.

Other Support (Caltech Awards from which You Have Been Paid)

This section includes Caltech Awards from which you have been paid in the last fiscal year and current fiscal year so far.

Federal Award # ↑≡	Caltech Award #	Award Manager	Source of Support	Primary Sponsor	Commitment (%)	Cost Share Commitment (%)
	BROWN	Collaborator, Joe	BROWN UNIVERSITY	Air Force - Subaward	3.00	-
	NSF	Beaver, Buchwald	NATIONAL SCIENCE FOUNDATION	NSF - Nat'l Science Foundation	2.99	-
	NSF.	Collaborator, Susan	NATIONAL SCIENCE FOUNDATION	NSF - Nat'l Science Foundation	6.66	-
	JHU.	Collaborator, John	JOHNS HOPKINS UNIVERSITY	Army-Subaward	1.93	-
	JHU.	Collaborator, John	JOHNS HOPKINS UNIVERSITY	Army-Subaward	-	-
	ONR.	Beaver, Buchwald	NAVY	Navy	8.33	-

Export Other Support to Excel

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Exporting External Other Support: Caltech Awards from which You were Paid

<div style="border:1px solid black; padding:10px;">

Export to Excel: Other Support: Grants, Contracts, Gifts
(Yellow Arrow): Click on the "Export to Excel" Hyperlink and follow instructions.

</div>

Other Support: Externally Funded Postdoctoral Fellows: This lists postdoctoral fellowships that are funded from outside of Caltech. Postdocs see this information, as do their PIs.

Other Support (Externally Funded Postdoctoral Fellows)

This section includes external supports from DPM.

Update	Sponsor	Post-Doc Name	Summary of Contribution	Outside Support Agency	Support Status	Estimated Dollar Value	Primary Place of Performance	Start Date	End Date	Person Months	Overlap
✏	Beaver, Buchwald	Postdoc, Patrice	Postdoctoral Scholar Fellowship Trainee in Chemistry	DFG	Active		-	07-APR-2020	-	-	-
✏	Beaver, Buchwald	Postdoc, Patrick	Postdoctoral Scholar Fellowship Trainee in Chemistry	Swiss National Science Foundation	Active		-	28-JUL-2020	-	-	-
✏	Beaver, Buchwald	Postdoc, Paulo	Postdoctoral Scholar Fellowship Trainee in Chemistry	Shanghai Institute of Organic Chemistry Fellowship	Active		-	23-MAR-2021	-	-	-
✏	Beaver, Buchwald	Postdoc, Paul	Postdoctoral Scholar Fellowship Trainee in Chemistry	SIOC Fellowship	Active		-	11-JAN-2021	-	-	-

Export Other Support to Excel

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Exporting External Other Support: Externally Funded Postdocs

Export to Excel: Other Support (Externally Funded Postdoctoral Fellows)
(Yellow Arrow): Click on the "Export to Excel" Hyperlink and follow instructions.

Post-Doctoral Fellow - Details

Back   Save

Person Name: Postdoc, Patrice
Start Date: 07-APR-2020
End Date:
Person Months:
Primary Place of Performance:
Country of Performance:
Overlap with Proposed Work:

Clear

Editing Other Support: Externally Funded Postdocs (Green Arrows):

1. Click on the Pencil ✏ next to the award you wish to edit.
2. Add/Edit information: Person Months, Place of performance (Name of Institution), Country of Performance and Overlap with Proposed Work (i.e. work in the proposal for which this is the Other Support document).
3. Click on the "Save" button.

Other Sections:

Entities Deleted from Biosketch

The entities listed here (if any) have been deleted from your DFIC, and will show here as deleted from the Biosketch Section.

> **Here is a list of your entities that have been deleted from your biosketch.**
>
> No Entities Found

Agency Instructions for Biosketch and Other/Current and Pending Support

Provided here, for your convenience, are links to some of the agencies' current disclosure requirements.

> **Agency Instructions for Biosketch and Other/Current and Pending Support**
>
> NIH, NSF, DOD, DOE, NASA,