

Proposal Overview

The Proposal Development (PD) Module is used to create and route proposals, modification requests and other miscellaneous (non-funded) agreements for institutional review and approval. The budget tool allows users to build budgets in system instead of utilizing separate excel file.

The Proposal Tracking (PT) Module is used to view submitted proposals, modification requests and other miscellaneous (non-funded) agreements including attachments, see the status of the record, and view compliance unit approvals. Subawards issued by LSU are also found on the Agreements tab. Information on awards can be found on the Awards tab.

Overview of Proposal Development Records

- All proposals will have the Setup Questions, LSU Questionnaire, Budget, Personnel, and Internal Uploads & Routing tabs.
- Proposals being submitted to Grants.gov will have additional sponsor specific tabs.

The screenshot shows the GeauxGrants interface for a proposal titled "Test Other G.gov DA training (L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Office of Science/Department of Energy)". The sidebar on the left contains several tabs: Setup Questions, LSU Questionnaire, Budget, Personnel, SF424 (H&R), Internal Uploads & Routing, Other Project Info, Performance Sites, Finalize, Tasks, and Proposal Tracking (PT). The main content area is divided into sections: "Setup Questions" with instructions on how to complete sections and a "Completed" checkbox; "Submission Mechanism/Form Information" with fields for Proposal Sponsor (Office of Science/Department of Energy) and Opportunity Number (DE-FOA-0002181); and "Grants.Gov Submission Information" with an Opportunity Number field (DE-FOA-0002181).

- **Setup Questions** – Collects general information about the proposal.
- **LSU Questionnaire** – Information on compliance and budget deviations are found here. This is also where we will capture investigators for F&A & Project % Credits.

Allocations / percent credit by Personnel:
 The total % F&A Distribution, and total % Project Credit for all investigators must each equal 100%. To add investigator's name and departments, click on pencil. Click "Add" to add an investigator.

* 26) Investigator

| * Investigator | * Role | * Department | * % F&A Distribution | * % Project Credit |
|-----------------------|---------------------------|--|----------------------|--------------------|
| Tiger, (L13) Mike the | a) Principal Investigator | LSUAM Sch of VETM Pathobiological Sciences | 100.00 | 100.00 |

- **Budget** – Provides the yearly details of Personnel and Non-Personnel costs. The budget summary tab shows the yearly breakdown and cumulative.

The screenshot displays the 'Budget Summary' tab. At the top, it shows the project period from 01-Jun-2020 to 31-May-2023. The main table lists three periods with their respective increments, start/end dates, types (New*), and statuses (Proposed). It also shows sponsor costs, cost sharing, and project totals. Below the main table, there are sections for 'Personnel' and 'Non-Personnel' costs, each with a sub-table of categories and amounts for each period.

- **Personnel** - The Principal Investigator must ensure that the Responsible column is checked for all LSU personnel who meet the PS-98 definition of Investigator. Per LSU's PS-98, an "Investigator" means the project director, principal Investigator, co-investigator, and any other individual, regardless of title or position, who is responsible for the design, conduct, or reporting of externally funded research, or proposals for such funding.
- Completed button must be unchecked before editing the information.

The screenshot displays the 'Personnel' tab. It shows a table with columns for PI, Name/Role, Mail, Alert, COI, Responsible, Organization/Department, Person Months (Calendar, Academic, Summer), CV/Biosketch, Current/Pending Support, and Remove. A yellow arrow points to the 'RESPONSIBLE' column for the first row. The table lists two Senior/Key personnel and one Non-Key personnel.

- **Internal Uploads and Routing** – PDF of LSU Questionnaire and Review Summary are also found here along with other documents for review.
 - List of required approvals will appear at the bottom of the screen.
 - The current status is shown at the top of the documents.

- Click the Scroll to see the Route History and any reviewer comments.

Current Proposal Status: Routing

Components for Initial Application ➔

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

[Add Institution Forms/Supporting Documents](#)

Active Routing Progress Open Full

AM200145 - (L13) Mike the Tiger "This is a test proposal for Manual Proposal Training."

| Route Name | Route Type | Step Number/Name | Who | Notified | Decision | Insert | Remove |
|---------------------------|--|--------------------------------|-------------------------|------------------------|---------------|--------|--------|
| Route Proposal Pre-Review | Step 1 - Gold/Purple Assignment | | Rebecca Trahan | 27-Sep-2019 4:24:23 PM | Informed - | | |
| Route Proposal Pre-Review | | | Ryan Russell Greer | 27-Sep-2019 4:24:24 PM | Informed - | | |
| Route Proposal Pre-Review | | | Dana Rene' Tuminello | 27-Sep-2019 4:24:25 PM | Informed - | | |
| Route Proposal Pre-Review | | | Tracy Wang | 27-Sep-2019 4:24:26 PM | Informed - | | |
| Route Proposal Pre-Review | | | Danya Delaune Courville | 27-Sep-2019 4:24:26 PM | Informed - | | |
| Route Proposal Pre-Review | Step 12 - Investigators/Dept Heads/Deans | Dr. Test the Department Head 1 | | 27-Sep-2019 4:24:29 PM | Informed - | | |
| Route Proposal Pre-Review | | (L13) Mike the Tiger | | 27-Sep-2019 4:24:28 PM | Approved - | | |
| Route Proposal Pre-Review | | Dr. Test the Department Head 2 | | 27-Sep-2019 4:24:27 PM | Approve As Is | | |
| Route Proposal Pre-Review | Step 13 - Inserted Step | (L15) Mike the Tiger | | | | | |

- Grants.gov tabs are specific to each Funding Opportunity Announcement. The Finalize tab is used to build the Grants.gov package. You can then view the full package with attachments prior to submission.

Overview of Proposal Tracking Records

PT Submissions

- Each separate submission (proposal, modification request, etc.) under the proposal record will appear in the left menu under Submissions. To expand a specific submission, click the plus sign next to the record. Information specific to that submission will appear.

Done Save Demo of manual proposal for ASP (L13) Mike the Tiger (LA Department of Wildlife & Fisheries (LDWF)) Proposal AM200132 View Mode

Submissions (1) Updated: 17-Sep-2019 8:50:38 AM Status: Routing Merge Template

AM200132/New

Proposal Type Institution Number Sponsor Proposal Number

Processed Date Submitted Deadline Date Deadline Type Deadline Time

Campus On Off

Proposal Attributes PHS/NIH Human Subjects Lab Animals Multi PI Training Grant Stem Cells Clinical Trial NIH Phase III Clinical Trial

Project Title

Summary tab

- Provides the current status of the record. Proposal Statuses are listed below:
 - **Pending** – Proposal initiated, but not routed.
 - **Routing** – Proposal routing for OSP Review and institutional approvals.

- **Returned for Revision** – Proposal was routed for institutional approvals, and a reviewer sent back for edits before approving. The route process will have to start over.
 - **Routing Approvals Received** – All institutional approvals have been received (except OSP).
 - **Approved to Submit** – OSP proposal approval. No changes can be made.
 - **Submitted** – Proposal has been submitted to sponsor.
 - **Tentative Grant Request** – Department requested tentative grant, but no award has been received.
 - **Award Received** – Proposal has been funded and award documents received by OSP.
 - **Declined** – Sponsor did not fund proposal.
 - **Withdrawn by PI** – PI decided not to submit proposal to sponsor.
 - **Withdrawn** – Proposal was submitted to sponsor and then withdrawn by university.
 - **Awarded to PI** – Proposal required submission by university, but award was made directly to PI (e.g. LA Board of Regents TGEF)
 - **Disapproved** – Proposal was routed for institutional approvals but was not approved for submission.
 - **Mod Request Approved** – Modification/Prior Approval request has been approved.
 - **Other Agreement Awarded** – Other Miscellaneous Agreement is fully-executed.
 - **Returned Without Review** – Record was routed incorrectly, and OSP returned without reviewing.
 - **Converted Award Received** – This status is associated with converted records from SPS. Proposal has been funded and award documents received by OSP.
 - **Revised** – Indicates a Revision was submitted to sponsor.
 - **Historical** – This status is associated with converted records from SPS that were marked as Historical in SPS.
- Additional proposal attributes and all information collected on the proposal LSU Questionnaire will appear on the Summary tab.
 - Once proposal has been routed to OSP for review, you can find the OSP Specialist assigned on the Summary tab under Additional Information – OSP Specialist.

| | |
|----------------|---------------|
| OSP Specialist | Billiot, Gina |
|----------------|---------------|

Sponsor tab

- Includes sponsor and originating sponsor, sponsor type, funding opportunity number if Grants.gov submission, program type, and sponsor program.

Sponsor

National Institutes of Health (NIH) Change Sponsor Type Federal Agency

Originating Sponsor Change

Opportunity Number Change

Program Change

Program Type Change
 Research, Basic

Sponsor/Agency Code Change
 F93015 CFDA

| Sponsor | |
|-----------------|--------------------------------------|
| Sponsor Program | [NIH Research Project Grant (R01)] |

Personnel tab

- Includes all personnel from proposal, and their effort.
- % Alloc. and Alloc. Amt fields are not in use. This does not reflect the investigator project credit and F&A credit.

Personnel

Person Months Change

| PI | NAME/ROLE | MAIL | COI | RESPONSIBLE | ORGANIZATION / DEPARTMENT | PERSON MONTHS | | | % ALLOC. | ALLOC. AMT. | REMOVE |
|-------------------------------|-----------|------|-----|-------------|--|---------------|----------|--------|----------|-------------|--------|
| | | | | | | CALENDAR | ACADEMIC | SUMMER | | | |
| (L14) Mike the Tiger PD/PI | | | | | Louisiana State University and A&M College LSUAM Sch of VETM Pathobiological Sciences | 0 | 0 | 0 | | | |

Legend:
 ● Prime

Budget tab

- This is a copy of the submitted budget.
- For converted records, the entire proposal amount will appear in Period 1 in the category of Converted Total Costs.

Agreements tab

Used for subawards issued by LSU. See Subaward Overview guide.

Communications tab

- Copies of all emails sent from GeauxGrants related to the specific submission will appear on this grey tab under the submission.

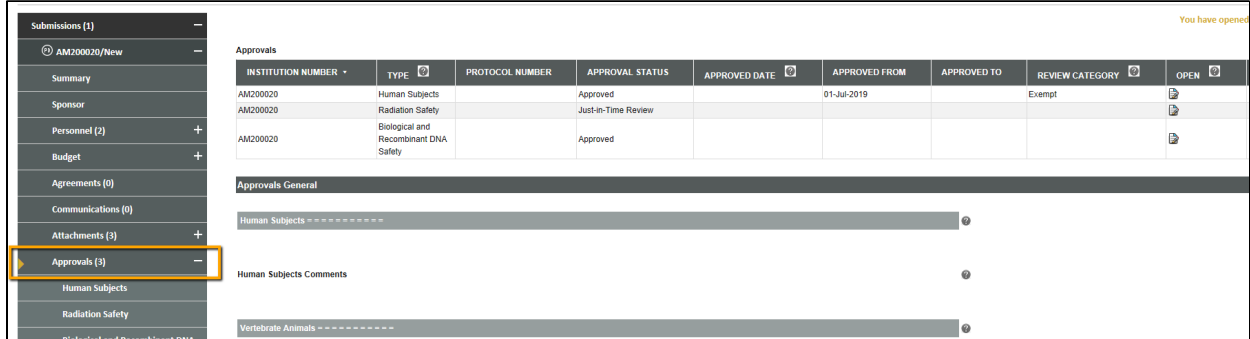
Attachments tab

- All attachments related to the specific submission will appear on this grey tab under the submission. You can also add Attachments here by clicking Add Document in top right.

- You can see all attachments for the entire proposal record on the black Attachments tab.

Approvals tab

- Compliance approvals for Human Subjects (IRB), Vertebrate Animals (IACUC), Recombinant DNA (IBRDS), Export Controls, and Radiation Safety will appear on this grey tab for the specific submission.



Submissions (1) AM200020/New

Summary

Sponsor

Personnel (2)

Budget

Agreements (0)

Communications (0)

Attachments (3)

Approvals (3)

Human Subjects

Radiation Safety

You have opened

Approvals

| INSTITUTION NUMBER | TYPE | PROTOCOL NUMBER | APPROVAL STATUS | APPROVED DATE | APPROVED FROM | APPROVED TO | REVIEW CATEGORY | OPEN |
|--------------------|---------------------------------------|-----------------|---------------------|---------------|---------------|-------------|-----------------|------|
| AM200020 | Human Subjects | | Approved | | 01-Jul-2019 | | Exempt | |
| AM200020 | Radiation Safety | | Just-in-Time Review | | | | | |
| AM200020 | Biological and Recombinant DNA Safety | | Approved | | | | | |

Approvals General

Human Subjects -----

Human Subjects Comments

Vertebrate Animals -----

- You can see all compliance approvals for the entire proposal record on the black Approvals tab.

Awards tab

- Will be used if project has been awarded. See [Award Overview](#) guide.