

Creating Other Miscellaneous Agreements

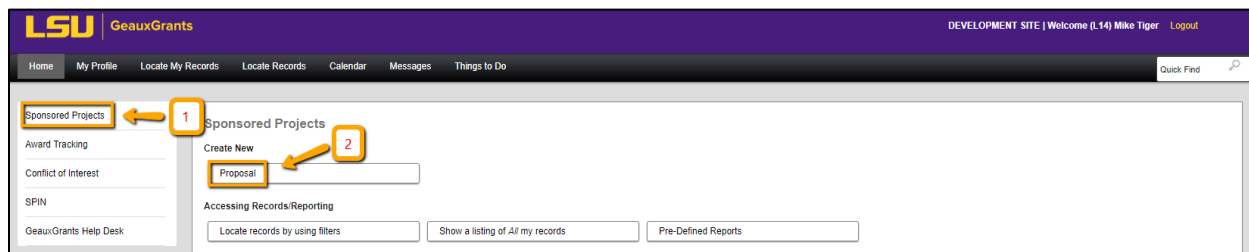
Other Miscellaneous Agreements are Non-Monetary Agreements which are related to ongoing research or sponsored projects which fall under the purview of LSU's Office of Sponsored Programs (OSP). Examples include: Basic/Master Agreements, Teaming Agreements, Memorandums of Understanding, National Lab User Agreements, Data Use Agreement (NIH only), Collaboration Agreements, and Cooperative Research and Development Agreements (CRADA)

How to Create a Proposal Development (PD) Record

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

Individuals with a GeauxGrants role of Department Administrators need to initiate Modification Requests. Please work with your department/college grant coordinator to initiate the request. If you do not have a coordinate, then contact OSP.

- 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

- 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

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

- Step 2: Choose Proposal Type of “Other Miscellaneous Agreement” and Click Continue.

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



If sponsor is not listed, select “Other Sponsor (To Be Added).” Complete the Request to Add New Sponsor form at https://isu.edu/geauxgrants/sponsored_projects/request_new_sponsor.php

- Step 4: Will be automatically numbered by the system

- Step 5: Enter Agreement Title and click Continue

- Step 6: Enter Agreement Start and End Dates and click Continue

New Proposal Questionnaire Back

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, (L13) Mike the Change
 Create a New Proposal
 Other Miscellaneous Agreements
 Shell Oil Company
 This proposal will be automatically numbered.
 Shell Master Agreement

From: 01-Jan-2020
 To: 31-Dec-2024

Continue

- Step 7: Confirm number of budget periods. This is not applicable for Other Agreements, but required by system.
- 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 Back

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, (L13) Mike the Change
 Create a New Proposal
 Other Miscellaneous Agreements
 Shell Oil Company
 This proposal will be automatically numbered.
 Shell Master Agreement
 01-Jan-2020 to 31-Dec-2024
 5

"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

Setup Questions

- Click Show to expose the screen template.

Done Save Shell Master Agreement
 (L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company) Proposal AM200202

Setup Questions

Please answer all questions below and click SAVE.

This proposal is broken down into several sections based upon what the institution requires. Once each section is complete, please indicate so by clicking the Completed checkbox in the upper right corner of the section.

If any changes are needed, please contact the Office of Sponsored Programs at osp@lsu.edu.

If this is a Modification Request, please click 'Show' at the top of the page and select the Modification Request Template.

If this is an Other Miscellaneous Agreement, please click 'Show' at the top of the page and select the Other Miscellaneous Agreement Template.

Show Reset Defaults

- From the Submission Mechanism/Screen Template select Other Miscellaneous Agreement.

Done Save Shell Master Agreement
 (L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company) Proposal AM200202

Setup Questions

This is used for the review and approval of Other Miscellaneous Agreements related to sponsored projects. Once each section is complete, please indicate so by clicking the Completed checkbox in the upper right corner of the section.

Submission Mechanism/Form Information

Proposal Sponsor Shell Oil Company Change

Is this a Flow Through Project? Yes No

Please select a Submission Mechanism/Screen Template Other Miscellaneous Agreement

- You will receive the following warning. Click OK.

You are changing the submission mechanism for this proposal. There may be previously completed components of this proposal that might have to be re-done because of formatting differences between the two mechanisms.

OK

Cancel

- This will change your screen to the Other Miscellaneous Agreement view. Complete all required fields.

- If the proposal includes investigators from multiple units, the Associated Department will need to be added in order for these investigators and their associated unit heads/administrators to view the proposal.
- To add associated departments (i.e. CCT, CAMD, joint appointments, etc.), click Show on top right and then Add to add the additional department. This will allow these departments access to this specific proposal.
- This field is progressive text and only need to enter part of name to populate. Click Select.

Department

Select

Close

LSUAM | ORED | CCT Director's Office

Filter by Institution

Louisiana State University and Agricultural and Mechanical College

- Check Completed when done. To edit this page Completed must be unchecked.

Personnel

- PI is copied from the New Proposal Questionnaire.
- Add any other Senior/Key Personnel for the Other Agreement by typing in their Name and selecting their role. Click Save to add.
- Check Completed in top right once all Personnel are added.

Done

Save

Shell Master Agreement
(L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company)

Proposal
AM200202

Setup Questions

Personnel

Internal Uploads & Routing

Tasks

Proposal Tracking (PT)

Personnel

Add Personnel (hide)

Prime

Proposal Structure

Institution
Louisiana State University and Agricultural and Mechanical College

Personnel Type
Key

Name (Last, First)
Billiot, Gina Larpenier - 897144545 - LSUAM | Sch of VETM

Role
Co-PI/PI

Create Profile

Save

Completed

Edit Mode

Internal Uploads & Routing

- Follow instructions at the top of the page.
- All documents for OSP review are uploaded here.
- Click Edit to Open LSU Agreement Questionnaire.

Done

Save

Shell Master Agreement
(L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company)

Proposal
AM200202

Setup Questions

Personnel

Internal Uploads & Routing

Tasks

Proposal Tracking (PT)

Internal Uploads & Routing

Step 1: Open the LSU Agreement Questionnaire form. Complete all sections. Once you have completed the form, click Lock Form in upper right corner.

Step 2: Please indicate the Other Miscellaneous Agreement is ready for routing by clicking the Completed checkbox in the upper right corner and then Route the request by clicking the 'Thumbs Up' icon.

Step 3: Click Accepted and then Submit to route the proposal.

Current Proposal Status: Pending

Components for Initial Application

FORM/DOCUMENT NAME

LSU Agreement Questionnaire (Proposal Documentation)

EDIT

STATUS

UPLOAD

REMOVE

Incomplete

Mandatory

Creating Other Miscellaneous Agreements

Page 5 of 9

LSU Agreement Questionnaire

- These questions are similar to the SPS Coversheet.

LSU MISCELLANEOUS AGREEMENT QUESTIONNAIRE

ALL PAGES

LSU

Lock Form Validate Save

LSU MISCELLANEOUS AGREEMENT QUESTIONNAIRE

ANSWER ALL QUESTIONS AND COMPLETE ALL REQUIRED FIELDS (*). WHEN DONE, CHECK COMPLETE AT TOP RIGHT OF PAGE.

Proposal #: AM200202

Certain Miscellaneous, Non-Monetary Agreements which are related to ongoing research or sponsored projects fall under the purview of LSU's Office of Sponsored Programs (OSP). This questionnaire form collects the basic information related to the agreement and obtains the necessary approvals and certifications from the initiating individual(s) and department/unit(s).

* Agreement Title:

Shell Master Agreement

* Description / Purpose of Agreement

* Select Type of Request:

☐ a) Basic / Master Agreement

☐ b) Teaming Agreement

☐ c) Memorandum of Understanding

☐ d) National Lab User Agreement

☐ e) Data Use Agreement (NIH only)

☐ f) Collaboration Agreement

☐ g) Cooperative Research and Development Agreements (CRADA)

☐ h) Other

COMPLIANCE INFORMATION.

* 1) Human Subjects records or samples? (Please go back to Setup Questions tab to change answer if needed)

Yes ☐ No ☒

- To change the title, enter new title in the Proposal Title box.

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

LSU MISCELLANEOUS AGREEMENT QUESTIONNAIRE

ANSWER ALL QUESTIONS AND COMPLETE ALL REQUIRED FIELDS (*). WHEN DONE, CHECK COMPLETE AT TOP RIGHT OF PAGE.

Proposal #: AM200202

Certain Miscellaneous, Non-Monetary Agreements which are related to ongoing research or sponsored projects fall under the purview of LSU's Office of Sponsored Programs (OSP). This questionnaire form collects the basic information related to the individual(s) and department/unit(s).

These Mandatory Questions need to be completed

Page	Question
1	Description / Purpose of Agreement

Shows missing required fields.

- Upload a copy of the Agreement and any other documentation by clicking "Add Institution Forms/Supporting Documents."

Internal Uploads & Routing

Step 1: Open the LSU Agreement Questionnaire form. Complete all sections. Once you have completed the form, click Lock Form in upper right corner.

Step 2: Please indicate the Other Miscellaneous Agreement is ready for routing by clicking the Completed checkbox in the upper right corner and then Route the request by clicking the 'Thumbs Up' icon.

Step 3: Click Accepted and then Submit to route the proposal.

Current Proposal Status: Pending

Components for Initial Application

Pre-Review Route: Agreement Route Submit Pre-Review

FORM/DOCUMENT NAME	EDIT	STATUS	UPLOAD	REMOVE
LSU Agreement Questionnaire (Proposal Documentation)		Completed		Mandatory
Add Institution Forms/Supporting Documents				

- Select Category of Other Documents and Folder of Proposal Attachments. Click Upload. Click Close when done.

Upload

Upload new document

Name: Master Agreement

Location: Browse... Test Upload 1.docx

Category: Other Documentation

Folder: Proposal Attachments

Add Initial Application Components

Upload Close

- User will route the Other Agreement for review and approvals by clicking the Submit button.

Pre-Review Route: Agreement Route Submit

- Click Accepted and then Continue.

Certification

Close

I have read and agree to the certifications on the LSU Agreement Questionnaire, if applicable.

☒ Accepted
 ☐ Declined

Continue

- If additional reviewers/approvers need to be inserted, follow the steps below:

- Step 1: Insert route after Step 12.



Make sure to click on insert icon after Step 12. **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.

- Step 2: Type Name of Approver, choose Approval Required and click Add. Newly added approver will be added to the Route and a notification will be sent for his/her review and approval.

Add step

Add

Cancel

Type Name

Step 2 Begin typing name here.

☐ Informational Only
 ☒ Approval Required

- Step 3: Inserted Approver will appear after Step 12. Click Submit in top right to route the Other Agreement.

Proposal AM220181 - Test (L17) Mike the Tiger "Shell Master Agreement (Test Proposal)" (Pending)

Refresh Route

Route Path - Agreement Route

Add New Person to Review Path

Submit

Step 1	Gold/Purple Assignment	Dana Tuminello	
	Gold/Purple Assignment	Ryan Russell Greer	
	Gold/Purple Assignment	Rebecca Trahan	
	Gold/Purple Assignment	Tracy Wang	
	Gold/Purple Assignment	Darya Delaune Courville	
Step 7	Export Controls	Andrew Curtis Lawson	
	Export Controls	Elizabeth Antolik Cadarette	
	Export Controls	Debra Keppler	
Step 12	Investigators/Dept Heads/Deans	Test (L17) Mike the Tiger	
	Investigators/Dept Heads/Deans	Dr. Konstantin G Kousoulas	
	Investigators/Dept Heads/Deans	Test (L5) Mike the Tiger	
	Investigators/Dept Heads/Deans	Test (L4) Mike the Tiger	
	Investigators/Dept Heads/Deans	Joseph Francis	
Inserted Step	Inserted Step	Test (L16) Mike the Tiger	

- After proposal is routed, 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.

Done

Save

Shell Master Agreement
(L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company)

Proposal
AM200202

✓ Setup Questions

Personnel

Internal Uploads & Routing

Tasks

Proposal Tracking (PT)

Internal Uploads & Routing

Step 1: Open the LSU Agreement Questionnaire form. Complete all sections. Once you have completed the form, click Lock Form in upper right corner.

Step 2: Please indicate the Other Miscellaneous Agreement is ready for routing by clicking the Completed checkbox in the upper right corner and then Route the request by clicking the 'Thumbs Up' icon.

Step 3: Click Accepted and then Submit to route the proposal.

Current Proposal Status: **Routing**

Components for Initial Application

Current Submission

FORM/DOCUMENT NAME	EDIT	STATUS	UPLOAD	REMOVE
LSU Agreement Questionnaire (Proposal Documentation)		Completed		Mandatory
Master Agreement (Other Documentation)		Completed		

Add Institution Forms/Supporting Documents

Active Routing Progress

AM200202 - (L13) Mike the Tiger"Shell Master Agreement"

Submitted by (L14) Mike the Tiger on behalf of (L13) Mike the Tiger

Route Name	Route Type	Step Number/Name	Who	Notified	Decision	Insert	Remove
Agreement Route	Pre-Review	Step 1 - Gold/Purple Assignment	Rebecca Trahan	22-Nov-2019 9:58:54 AM	Informed -		
Agreement Route	Pre-Review		Ryan Russell Greer	22-Nov-2019 9:58:55 AM	Informed -		
Agreement Route	Pre-Review		Derye Delaine Courville	22-Nov-2019 9:58:56 AM	Informed -		
Agreement Route	Pre-Review		Dana Tuminello	22-Nov-2019 9:58:56 AM	Informed -		
Agreement Route	Pre-Review		Tracy Wang	22-Nov-2019 9:58:57 AM	Informed -		
Agreement Route	Pre-Review	Step 10 - Investigators/Dept Heads/Deans (L13) Mike the Tiger		22-Nov-2019 9:58:58 AM			