

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.

- **Setup Questions** – Collects general information about the proposal.
- **LSU Questionnaire** – These questions are similar to the SPS Coversheet. 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. Below this, there are several summary tables:

- Periods [hide]**: A table with columns for Year/Period, Increment, Start, End, Type, Status, Sponsor, Cost Sharing, Project, and Total. It lists three periods with their respective costs.
- SubAward Summary (Show)**: A table showing subaward details for University of Louisiana at Lafayette.
- Personnel [hide]**: A table listing personnel roles like 'Tiger (L13) Mike PD/PI', 'TSH Graduate Student', and 'TSH Undergraduate Student' with their costs across three periods.
- Non-Personnel [hide]**: A table listing categories like 'Materials and Supplies', 'Other Direct Costs', 'Travel-Domestic', and 'Tuition Remission' with their costs.
- SubAwards [hide]**: A table showing subaward details for University of Louisiana at Lafayette.
- Subprojects [show]**: A table showing subproject details.

- **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 list of personnel roles with columns for Name/Role, Mail, Alert, COI, Responsible, Organization/Department, Person Months, CV/Biosketch, Current/Pending Support, and Remove. A yellow arrow points to the 'RESPONSIBLE' column for the first entry, which is '(L13) Mike the Tiger PD/PI * Certifications and Training ULL PI'.

- **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

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 changed 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** – This status is associated with converted records from SPS. 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
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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 Sponsor/Agency Code
F93015

Program

Program Type Change
Research, Basic

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 View Mod

Person Months

PI	NAME/ROLE	MAIL	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS			% ALLOC.	ALLOC. AMT.	REMOVE
						CALENDAR	ACADEMIC	SUMMER			
	(L14) Mike the Tiger PD/PI <small>Certifications and Training</small>				Louisiana State University and A&M College LSUAM Sch of VETM Pathobiological Sciences	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

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.

The screenshot shows the Budget tab interface. The main content area includes a 'Budget Summary' table with the following data:

YEAR/PERIOD	INCREMENT	START	END	TYPE	STATUS	Sponsor	Cost Sharing	Project
1	1	01-Jun-2020	01-Jun-2024	New*	Proposed	\$ 412,990.00	\$ 296,371.00	\$ 709,361.00
Total:						\$ 412,990.00	\$ 296,371.00	\$ 709,361.00

Below this is a 'Subproject Summary' table:

Subproject	PERIOD 1	DIRECT COSTS
Converted Total Costs	\$412,990.00	\$412,990.00
Subtotal Non-Personnel:	\$ 412,990.00	\$ 412,990.00

At the bottom right, a summary table shows:

	PERIOD 1	TOTAL COSTS
Total Sponsor Direct Costs:	\$ 412,990.00	\$ 412,990.00
Sponsor F&A:	0.00	0.00
Total Sponsor Costs:	\$ 412,990.00	\$ 412,990.00

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.

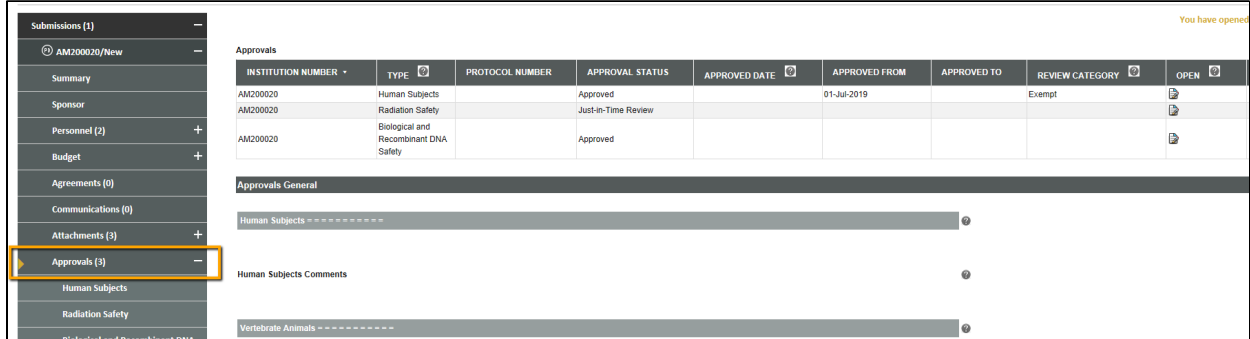
The screenshot shows the Attachments tab interface. The main content area displays a table of attachments:

Name	Category	Folder	Managed by	Submission	Versions	Last Updated
Budget Justification	Budget Justification	ROOT	Submission Package	Initial Application	1	17-Sep-2019 10:18:03 AM
LSUGenericBudget.xls	Budget Document	ROOT	Submission Package	Initial Application	1	17-Sep-2019 10:17:44 AM
LSU Questionnaire	Proposal Documentation	ROOT	Submission Package	Initial Application	1	31-Oct-2019 2:00:29 PM
Review Summary	Proposal Documentation	ROOT	Submission Package	Initial Application	1	31-Oct-2019 2:00:29 PM
LSU Questionnaire (Read Only)	Proposal Documentation	ROOT	Submission Package	Initial Application	1	31-Oct-2019 2:00:29 PM

- 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.



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.