

Subaward Overview

Workday is the official system of record for outgoing Subawards. GeauxGrants is used to capture additional award information, track workflow, store subaward documents, and capture Principal Investigator (PI) approval of subaward terms and conditions.

How to access Proposal Tracking (PT) Record

There are two ways to access the Proposal Tracking record.

- 1) From GeauxGrants Home Screen Using Quick Find
 - Type in proposal number in Quick Find search box in top right corner and click Enter.

LSU GeauxGrants	S Module Admin DEVELOPMENT SITE Welcome Rebecca Trahan LSU ASM v Lopout
Home My Profile Locate My F	Records Locate Records Calendar Messages Things to Do
Sponsored Projects Award Tracking Conflict of Interest SPIN	Award Tracking Create New Accessing Records Reporting
GeauxGrants Help Desk	Locate records by using titlers Show a listing of All my records Adhoc Kepoting Pre-Defined Reports
Contact Info	

• Click on the record number to bring up menu. Then hover over "Proposal Tracking" and then click "View".

	auxGrants						
Home My Profile	Locate My Records	y Records Locate Records Calendar Messages Things to Do		ings to Do			
Sponsored Projects	Results fo	ound: 1					Export to Excel
Award Tracking	Drag a co	olumn header and	d drop it here to gr	oup by that column			
Human Protocol	R	Record Number	Proposal Type	Record Primary Sponsor	Record Owner	Record Status	Record Title
		AM210993 New		University of Calgary Tiger, (L17) Mike the Pending		Pending	test for upgrade
Conflict of Interest			Fracking	Edit			
SPIN		Overview	Info 🕨	View			

- 2) From GeauxGrants Sponsored Project tab Using Locate records by using filters.
 - From the Sponsored Projects Menu, click Locate records by using filters.

LSU GeauxGrant	s
Home My Profile Locate My	Records Locate Records Calendar Messages Things to Do
Sponsored Projects	
Award Tracking	Sponsored Projects Create New
Conflict of Interest	Proposal
SPIN	Accessing Records/Reporting
GeauxGrants Help Desk	Locate records by using filters Show a listing of All my records Pre-Defined Reports
Contact Info	
Conflict of Interests	
Development	
130 David Boyd Hall	
Louisiana State University	
(225) 578-5833	
research@lsu.edu	

• Select the criteria for your search. You can search by single or multiple options. In the Selected fields option you can click on the grey square to change your search from Exact Match (=), Contains (C), or Wildcards (*?). After entering all criteria, click Search.

Select 'Locate' Criteria			Help Close
Modules available for searching across:	st 🔽 Sponsored Project		
Available fields to search by		Selected fields	Search
Record Associated Departments Record Classification Codes Record Creation Date Record Key Words Record Number Record Owner Record Owner Primary Department Record Personnel Record Personnel Record Personnel Record Primary Department Record Primary Department Record Primary Department Record Primary Sponsor	 Record Primary Sponsor Type Record Status Record Title Status Code Grouping Award Number Grants.gov ID Number Keywords Originating Sponsor OSP Specialist Proposal Type Sponsor Proposal Number 	Record Number	

• Click on the record number to bring up menu. Then hover over "Proposal Tracking" and then click "View".

GeauxGrants									
Home My Profile Loca	e Locate My Records		Records Locate Records Calendar Messages Things to Do						
Sponsored Projects	Results fo	ound: 1					Export to Excel		
Award Tracking	Drag a co	olumn header an	d drop it here to gr	roup by that column					
Human Protocol	F	Record Number	Proposal Type	Record Primary Sponsor	Record Owner	Record Status	Record Title		
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		Proposal I	Development 🕨						
Conflict of Interest	•		Tracking	Edit					
SPIN		Overview	Info 🕨	View					

Agreements

- Under the Master Submission record (first record), click on Agreements to see any Subawards for this project.
- You can open the subaward by clicking on "Detail" or by clicking the Subaward in the left tab.
- If you hover over the word Agreement type/number in left tab, it will display the name of the Subrecipient.

\bigcirc	A https://araiteii.bu.edu/PTNbT2/UU/agreements.app/projed=728E795A-F3F8-4FF2-A608-1F6166D6E3CD 🕸															
	E Done Save test for upgrade Prop Test (1.17) Mike the Tiger (University of Calgary) AM224											Proposal W210993				
	Submissions (2) Agreement Summary (2 Found) Vie © AA210993/New									w Mode						
	Summary		Drag a column header a	and drop it her	e to group by that column											
	Sponsor		Number	T	Institution	T	Subaward Number	Туре	Status	From	т т	Го	T D	ate Sig '	r 🚽	1
	Personnel (2)	+	AM210993		LifeCity LLC		GR-7925	Subaward	Request Received	01-Sep-2020	3	1-Aug-2021			Detail	^
	Budget	+	AM210993		McNeese State University		PO-0000123456	Subaward	Process Complete	01-Sep-2020	3	1-Aug-2021	20)-Aug-2021	Detail	~
	Agreements (2)	-													1 inf	on the second
	Subaward/GR-7925	+												Powere	i By UI U	LOBAL
	Subaward/PO-0000123	456 +											Copyrig	ht © 2021 Infe	Ed Internation	sal, Inc.

• The Subaward Detail screen will provide you with a summary of the subaward and the subaward status.

Done Save This is test pr Test (L13) Mi	oposal for Creating Manual Pro ke the Tiger (National Science F	oosal Training. 4/8/21 oundation (NSF))				Proposal AM211192
Submissions (1) —						View Mode
@ AM211192/New —	Edit Agreements/Contracts					Current Status: PI Review Complete
Summary	Agreement Type @		Agreement From @	Agreement To 🐵	Date Signed 🚳	
Sponsor	Subaward]	01-Jul-2021	30-Jun-2022		
Personnel (4) +	Institution Name University of Louisiana at I	afayette (ULL)			Subaward Number @ GR-1234	
Budget +						
Agreements (2) —	Agreement Comments @					
Subaward —						
Test Upload 1.docx						
Test Upload 2.docx	Agreement Status History					
Assignments	Agreement Status			Agreement Status History Date		
	Agreement Status History	omments @		15-30-2021		
Subaward Amendment+		, and the second s				
Communications (6)			Add			
Attachments (5) +	You have 1000 characters	eft. @	Subaward Status			
Approvals (0)						
Charles 15-hours (6)	DATE A	STATUS	RECORDED DATE	RECORDED BY	COMMENTS	DELETE
Status history (b)	28-Jun-2021	PI Review Complete	28-Jun-2021 10:22:28 AM	(L10) OSP Analyst		î
Agreements (2) +	28-Jun-2021	PI Review	28-Jun-2021 10:20:30 AM	(L10) OSP Analyst		î
Awards (1)	28-Jun-2021	Drafting	28-Jun-2021 10:19:52 AM	(L10) OSP Analyst	Assigned to Rebecca	1
T T	25-Jun-2021	Request Received	25-Jun-2021 01:48:22 PM	(L10) OSP Analyst	New Agreement	
Approvals (0)						

• Subaward Agreement Statuses

- Request Received OSP has received the OSP-3 or OSP-4 form.
- OSP Assignment Subaward/amendment with OSP team lead for assignment to a specialist.
- **Drafting –** Subaward/amendment is being reviewed/drafted by OSP specialist.
- **PI Review** Draft subaward sent in GeauxGrants for PI review.
- **PI Review Complete** PI approved draft subaward terms. PI has ability to add comments when approving.
- Sent to Sub for Signature OSP has sent subaward/amendment to subrecipient for review and signature.
- Unilateral Sent to Sub OSP has sent unilateral amendment to subrecipient for review. Only applicable to LBRN and LaSPACE projects.
- Negotiating Subrecipient has requested changes. OSP Specialist is reviewing/negotiating.
- Partially Executed Received Subrecipient has signed subaward and returned to OSP for counter-signature.
- Fully Executed Subaward has been signed by LSU, and needs to be processed in Workday.
- **Requisition/Change Order entered in Workday** OSP has entered subaward/amendment in Workday. Waiting on approvals.
- o **Process Complete** Fully-executed subaward/amendment sent to subrecipient.

- Withdrawn Subaward was received by OSP, but PI decided not to issue or the parties could not come to terms.
- **Closed** Project and subaward have been closed.
- The bottom of the Summary Detail screen includes additional Agreement Details which will be updated by OSP.
- The subaward documents, including OSP-3/4 forms and Subaward Agreement/Amendment, can be viewed from the Agreements tab Document Summary. Click the eyeglasses icon in the View Latest column.

Budget +								
Agreements (2) —	Agreement Comments -							
Subaward/GR-7925 —								
AM200558 Life City OSP-3.pdf								li
AM200558 LifeCity Pre-	Agreement Status History							
Assessment Form.pdf	Agreement Status 🎯			Agreement Status History Date	0			
Assignments	Request Received V			24-Aug-2021				
Subaward/PO-0000123456 +	Agreement Status History Com	ments 🖗						
Communications (7)								
Attachments (8) +		<u>^</u>	Add					
Approvals (0)	You have 1000 characters left.	8						
Status History (1)	DATE •	STATUS	RECORDED DATE	RECORDED	BY	COMME	NTS	DELETE
④ AM210993-01/Modification +	20-Aug-2021	Request Received	20-Aug-2021 02:33:22 PM	Gabrielle Ses	sum	New Agree	ement	î.
Agreements (2) +	Document Summary							Add
Awards (0)	NAME		CATEGORY	VIEW	HISTORY	VERSIONS	LAST UPDATED	DELETE
	AM200558 Life City OSP-3.pdf		OSP-3/4	661	3	1	20-Aug-2021	î
Approvals (0)	AM200558 LifeCity Pre-Assessm	nent Form.pdf	Subaward Pre-assessment	ái'	3	1	20-Aug-2021	Î

• Agreement Assignments

 Shows you who is currently reviewing the subaward, how long they have had it, and the text of the email they received. In the scenario below, the status is PI Review, so it is assigned to our PI, Mike the Tiger.

Done Save 2012345 - test ns (L13) Mike the Ti	Done Save 2012345 - test nsf da training proposal. Propos (13) Mike the Tiger (National Science Foundation (NSF)) AM20012									
Submissions (2) —						View	Mode			
® AM200125/New —	Assignments for Subaward (1 persor) Add								
Summary	Assigned Date	Assigned To	Due	Instructions	Open	Remove				
Sponsor Personnel (3) +	19-Nov-2019 3:09:48 PM	(L13) Mike the Tiger		New subaward or subaward amendment for AM200125	₽	<u>द</u>	< >			
Budget +	×	×		1						
Agreements (1) —	Item History	to PI		Click to see text of email sent to PI>						
Subaward —	Drag a column header and drop it h	ere to group by that column								
OSP-3 form	Assigned Date	Y Assigned To	Duration	Instructions	Completed Date	Completed By				
Nicholls Subaward Draft				Vou have been assigned to			^			
Assignments	▶ 19-Nov-2019 1:57:50 PM	(L10) OSP Analyst	0 days	draft subaward for AM200125; PI (L13) Mike the Tiger; LSUAM Sob of VETM Databakislasical	19-Nov-2019 3:09:47 PM	(L10) OSP Analyst				

PI Review and Approval of Subawards

• Once OSP has drafted the subaward, they will attach the draft in GeauxGrants and change the Subaward status to PI Review.

An email will be sent to the PI from GeauxGrants.

• See <u>Subaward Approvals</u>.