![LSU GeauxGrants]

Proposals must be completed and routed seven (7) business days before the deadline for OSP to submit the proposal.

Creating Manual Proposals

Manual Proposals are used for all proposals not submitted via Grants.gov. Examples include: proposals where LSU is a subrecipient; proposals to non-federal agencies; National Aeronautics Space Agency (NASA) proposals which use NSPIRES; National Science Foundation (NSF) proposals that must be submitted via Research.gov (i.e. linked collaborative proposals, NSF proposals will no PI effort).

How to Create a Proposal Development (PD) Record

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

- **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
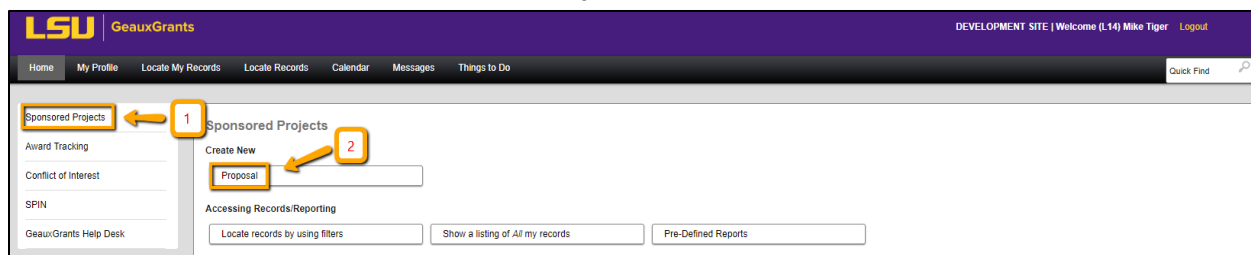
New Proposal Questionnaire

The New Proposal Questionnaire consists of several steps (Steps 0-7). To go back a step, click Back on top right. All search fields are progressive text.

- **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.

- **Step 1**: Click on "Create a New Proposal" and click Continue

New Proposal Questionnaire

Step 0: *Confirm you intend for the PI of this proposal to be*

Step 1: *Create a "New" Proposal or "Copy From Existing"?*

Tiger, (L17) Mike the Change

Create a New Proposal
Copy From Existing Proposal

Continue

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

New Proposal Questionnaire

Step 0: *Confirm you intend for the PI of this proposal to be*

Step 1: *"New" or "Copy From Existing"?*

Step 1: *Continued*

Tiger, (L17) Mike the Change

Create a New Proposal

Setup Proposal Manually

Continue

- **Step 2**: Choose Proposal Type and Click Continue.

New Proposal Questionnaire   Back

Step 0: *Confirm you intend for the PI of this proposal to be*   Billiot, Gina Larpenter Change

Step 1: *"New" or "Copy From Existing"?*   Create a New Proposal

Step 2: *Please Select a Proposal Type*   New

Continue

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

TIP! **If sponsor is not listed, select "Other Sponsor (To Be Added)." Complete the Request to Add New Sponsor form at**
https://lsu.edu/geauxgrants/sponsored_projects/request_new_sponsor.php

New Proposal Questionnaire   Back

Step 0: *Confirm you intend for the PI of this proposal to be*   Tiger, (L14) Mike the Change

Step 1: *"New" or "Copy From Existing"?*   Create a New Proposal

Step 2: *Proposal Type*   New

Step 3: *Select a Sponsor*   Alfred P. Sloan Foundation

Continue

- **Step 4**: Will be automatically numbered by the system
- **Step 5**: Enter Proposal's Title and click Continue

New Proposal Questionnaire   Back

Step 0: *Confirm you intend for the PI of this proposal to be*   Tiger, (L14) Mike the Change

Step 1: *"New" or "Copy From Existing"?*   Create a New Proposal

Step 2: *Proposal Type*   New

Step 3: *Selected Sponsor*   Alfred P. Sloan Foundation

Step 4: *"Tracking" Number or "Proposal" Number*   This proposal will be automatically numbered.

Step 5: *Proposal's Title*

This is a test manual proposal for Dept Admin

Continue

- **Step 6**: Enter Project Start and End Dates and click Continue
  - We recommend the start date to be the first of the month and the end date to be the last day of the month for budget calculation purposes.

- **Step 7**: Confirm number of budget periods. If this changes, the dates will need to be changed on the Budget Setup section of the Budget. Click Continue.

- 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.

Setup Questions

GeauxGrants will automatically generate a Proposal/Record/Institution #. GeauxGrants numbering will be AMFYXXXX. For Fiscal Year (FY) 2026, all numbers begin with AM26.

This tab gathers general information about your proposal. After you complete this section, additional proposal tabs will appear to the left of the screen.

TIP! **Click Done on top left to close out the proposal. Do not close browser using X on top right**.

☰ Done Save	this is a test for Manual	Record/Institution Number	Proposal
	Test (L17) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences | CC00293 (Alfred P. Sloan Foundation)		AM250326
Setup Questions	Setup Questions		Show Reset Defaults

TIP! **Hover your mouse over ❓ icons to see instructions or definitions.**

HELP INFORMATION

The sponsor selected on the New Proposal Questionnaire appears here. Click **Change** to update. Changing the sponsor may change the available Submission Mechanism/Screen Template for Grants.gov submissions.
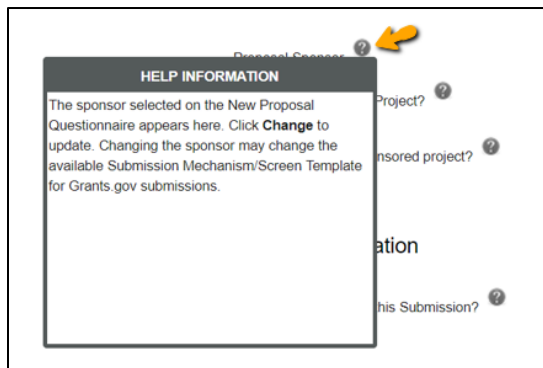
- Read instructions at the top of the page, answer all questions. Click Save at any point to preserve all data entered. Clicking Save and Continue at the bottom right corner will validate the form.

- Deadline: Enter deadline date as the date you would like OSP to submit your proposal. If submission has a deadline then you must also enter deadline time. Use Central Time Zone. For sponsors with deadlines after work hours, enter 5:00 PM. All proposal must be submitted by OSP before 5:00 PM.

- Associated Departments: If the proposal includes investigators from multiple units or the PI has a joint appointment, the Associated Department will need to be added in order for the investigator's associated unit heads/administrators to view the proposal.

  - To add associated departments (i.e. CCT, CAMD, joint appointments, etc.), click Add next to Associated Departments.
  - If the PI has a joint appointment, click Add next to PI Departments.

| Associated Departments ❓ | LSUAM \| Sch of VETM \| Pathobiological Sciences
Add |
| PI Departments ❓ | LSUAM \| Sch of VETM \| Pathobiological Sciences
Add |

- This field is progressive text and you 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 ▼

- You will then see a toggle by the PI Departments. The unit that is marked will be the Primary Department for the proposal and any resulting award. Select and then click Save in top Left.

TIP! **The Primary Department will administer the award in Workday.**

Associated Departments ❓	LSUAM	Sch of VETM	Pathobiological Sciences Add
PI Departments ❓	⦿ LSUAM	Sch of VETM	Pathobiological Sciences ◯ LSUAM	ORED	CCT Director's Office Remove Add

- Click Add to add the additional Associated Departments.

General Proposal Properties

Will your proposal involve the use of Human Subjects? ❓	◯ Yes ⦿ No
Will your proposal involve the use of Laboratory Animals? ❓	◯ Yes ⦿ No
Will your proposal involve multiple principal investigators? ❓	◯ Yes ⦿ No
Will your proposal be a training grant? ❓	◯ Yes ⦿ No
Associated Departments ❓	LSUAM	Sch of VETM	Pathobiological Sciences Add
PI Departments ❓	LSUAM	Sch of VETM	Pathobiological Sciences Add

- This field is progressive text and you 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 ▼

LSU Questionnaire

This is where we capture compliance, budget and specific information about your proposal, including investigators for F&A & Project % Credits.

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

- Answer all mandatory questions. Yes answers may include a prompt for additional information. Click Save at any point to preserve all data entered. Clicking Completed will validate form.

 Make sure to answer correctly before routing as many of these questions trigger an approval step in the route.

- Investigators % F&A Distribution & % Project Credit (#26) of the LSU Questionnaire. You will enter the Investigator Name, Role, Department, and %. If an investigator has a joint appointment and required to split his/her credit between units, you will need to enter them twice. To add additional investigators or departments click the Add button.

- To enter the Investigator Name or Department, click the pencil icon. For Department, begin typing the cost center name/Investigator name in the search box. The box should be progressive text. Once it appears, click on unit name and then click Select.

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

Budget

See separate user guide for [Creating a Detailed Budget](#).

<u>Note</u>: If a sponsor requires the use of the sponsor's budget template then a simplified budget may be entered in GeauxGrants. Follow the instructions for [Creating a Simplified Budget](#).

Personnel

All personnel listed on the detailed budget will populate on this tab. If you enter individuals on the Personnel tab, that person will automatically populate on the Budget tab and vice versa.

You must add all investigators that are in #26 of the LSU Questionnaire to the Personnel tab. This will ensure that all necessary routing approvals are received.

- To add investigators, type in their name, choose role using the dropdown, begin typing name, and click Save.

- If you created a detailed budget, effort from the budget will automatically populate on the Personnel tab. If you created a Simplified budget, you will enter senior personnel effort on the Personnel tab. Click the lock button next to Person Months to edit.

- Type in the annual effort (requested + cost shared). If the effort varies each year, type in the average. Click Save.

- The Responsible column indicates who is an Investigator per PS-98 for Financial Conflict of Interest. PD/PI and Co-PD/PI are automatically checked. All LSU PI and Co-Investigators should be checked. Indicate other responsible investigators by clicking the checkbox by their name.

- COI column will either have a green check, yellow sign, or red question mark.

  - If green check mark appears, a Significant Financial Interest (SFI) disclosure has been "Received in GeauxGrants."
  - If red question mark appears, a SFI disclosure has either been "Created; No Disclosure" or there is "No Current Disclosure". SFI needs to be submitted.

- The Legend describes who is on the Prime and who is on the Subaward.

- Check Complete when done. Complete must be unchecked before editing the information.

Internal Uploads & Routing

All documents for OSP review are uploaded here. Follow instructions at the top of the page.

- **Step 1**: Click Add Institution Forms/Supporting Documentation to upload documents.
- **Step 2**: After completing all previous tabs (checkmarks on left navigation), user must open both LSU Questionnaire and the Review Summary to Complete/Lock these forms.

- **Step 3**: To route proposal for review and approvals, click the Submit button. This step must be completed seven (7) business days before the deadline for OSP to submit the proposal.

- **Step 4**: Click Accept and then Continue.

- **Step 5**: If units receiving Investigator Credit are not included in the Route, follow the steps below:
  - **Step 5a**: Insert route after Step 16

TIP! **Make sure to click on insert icon after Step 16. <u>Do not click on Add new Person to Review Path</u>. This button inserts the person at the beginning instead of the end of the route and prevents OSP from being notified of proposal.**

- **Step 5b**: Type Name of Investigator, choose Approval Required and click Add. Newly added Investigator will be added to the Route and a notification will be sent for his/her review and approval.

- **Step 5c**: Inserted Investigator will appear after Step 16. Click Submit in top right to route the proposal.

- 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.

- Click Done in the top left corner.