

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

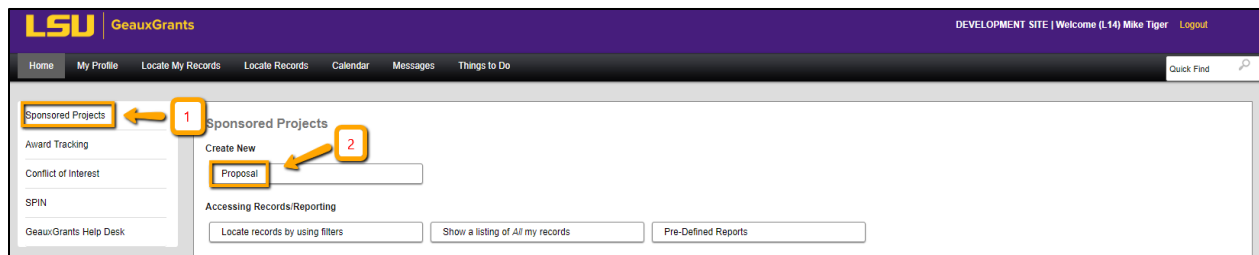
## Creating Manual Proposals

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.

**New Proposal Questionnaire**

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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"?*

Continue

Create a New Proposal
Copy From Existing Proposal

- **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 and Click 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.



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](https://lsu.edu/geauxgrants/sponsored_projects/request_new_sponsor.php)

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

**New Proposal Questionnaire** Back

Step 0: Confirm you intend for the PI of this proposal to be Tiger, (L13) 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

Step 6: What are the project start and end dates?

From 01-Jan-2020

To 31-Dec-2020

- **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.

**New Proposal Questionnaire** Back

Step 0: Confirm you intend for the PI of this proposal to be Tiger, (L13) 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

Step 6: Project Start and End Dates 01-Jan-2020 to 31-Dec-2020

Step 7: How many years and/or budget periods would you like? 1

**\*NOTE:** If you need additional years/periods beyond 7, you may add them as needed once inside the proposal.

- 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 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.

Step 6: Project Start and End Dates 01-Jan-2020 to 31-Dec-2020

Step 7: Number of Budget Periods 1

Is all of the above information correct?

**\*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.

## Setup Questions

GeauxGrants will automatically generate a Proposal/Record/Institution #. GeauxGrants numbering will be AMFYXXXX. For Fiscal Year (FY) 2024, all numbers begin with AM24.

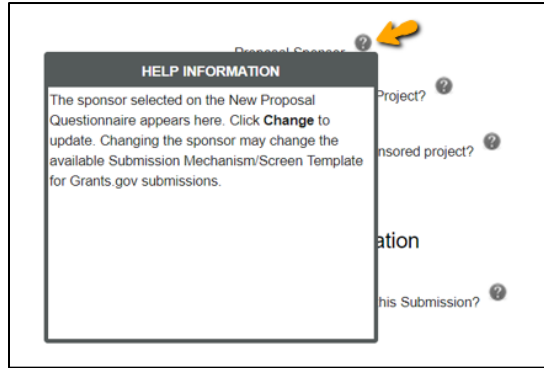
This tab gathers general information about your proposal. After you complete this section, additional proposal tabs will appear to the left of the screen.



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




Hover your mouse over ? icons to see instructions or definitions.




- 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.



- This field is progressive text and you only need to enter part of name to populate. Click Select.

**Department** 

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**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.



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

Associated Departments <sup>?</sup> LSUAM | Sch of VETM | Pathobiological Sciences  
Add

PI Departments <sup>?</sup>  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? <sup>?</sup>  Yes  No

Will your proposal involve the use of Laboratory Animals? <sup>?</sup>  Yes  No


Will your proposal involve multiple principal investigators? <sup>?</sup>  Yes  No

Will your proposal be a training grant? <sup>?</sup>  Yes  No


Associated Departments <sup>?</sup>  LSUAM | Sch of VETM | Pathobiological Sciences  
Add

PI Departments <sup>?</sup> 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** 

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**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.**

Done Save

Proposal  
AM200151

This is a test manual proposal for Dept Admin.  
(L14) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Alfred P. Sloan Foundation)

- Setup Questions
- LSU Questionnaire
- Budget
- Personnel
- Internal Uploads & Routing
- Tasks
- Proposal Tracking (PT)

### Data Collection

Validate Complete

LSU Questionnaire

Answer all questions and complete all required fields (\*). When done, check Complete at top right of page.

**Proposal #:** AM200151

**\* Proposal Title:**  
This is a test manual proposal for Dept Admin.

**Compliance Information.**

**\* 1) Human Subjects records or samples? (Please go back to Setup Questions tab to change answer if needed)**  
Yes  No

**\* 2) Vertebrate animals? (Please go back to Setup Questions tab to change answer if needed)**  
Yes  No

**\* 3) Recombinant DNA, infectious agents, transgenic plants or animals, human or primate cells/tissues or biological toxins?**  
Yes  No

**\* 4) Radiation sources? This includes projects that involve sources of radiation, use of CAMD, or use of Class 3B or 4 lasers.**  
Yes  No

**\* 5.) Export Controls**

\* a.) LSU personnel to hand carry, deliver or ship equipment, components, materials, or software on media internationally?  
Yes  No

\* b.) Export-controlled, confidential or proprietary information to be received on campus?  
Yes  No

\* c.) Restrict foreign national participation or dissemination of results (e.g. publication restrictions)?  
Yes  No

\* d.) Development of encryption software?  
Yes  No

\* e.) A portion of the work to be conducted outside of the U.S?  
Yes  No

\* f.) Foreign sponsor or foreign researcher involvement (non-LSU employees)?  
Yes  No

**\* 6) Special data security requirements (e.g. NIST 800)?**  
Yes  No

- 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.

**\* 26) Investigator**

* Investigator	* Role	* Department	* % F&A Distribution	* % Project Credit	
Tiger, (L14) Mike the	a) Principal Investigator	LSUAM   ORED   CCT Director's Office	50.00	0.00	X
Tiger, (L14) Mike the	a) Principal Investigator	LSUAM   Sch of VETM   Pathobiological Sciences	50.00	100.00	X

**Add**

- To enter the Investigator Name or Department, click the pencil icon. For Department, begin typing the cost center name in Find Department. Once it appears, click on unit name and then click Select.

**Departments** Close

Find Department:  Locate **Select**

- Louisiana State University and A&M College 
  - Conversion
  - + Louisiana State University A and M
  - + School 1

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

Done Save This is a test manual proposal for Dept Admin. (L14) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Alfred P. Sloan Foundation) Proposal AM200151

Setup Questions  LSU Questionnaire  Budget  Personnel  Internal Uploads & Routing

Data Collection

**These Mandatory Questions need to be completed**

Page Question

3) Recombinant DNA, infectious agents, transgenic plants or animals, human or primate cells/tissues or biological toxins?

Validate Complete

## Budget

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

**Note:** 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.

This is a test manual proposal for Dept Admin.  
(L14) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Alfred P. Sloan Foundation)

Proposal AM200151

Setup Questions  
LSU Questionnaire  
Budget  
Personnel  
Internal Uploads & Routing

Tasks  
Management Record (PI)

Personnel

Add Personnel [hide]

Prime Proposal Structure Institution Louisiana State University and ...

Personnel Type Key

Create Profile Name (Last, First) Role Co-PD/PI

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.

Sample BOR proposal.  
(L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (LA Board of Regents (BOR))

Proposal AM210045

Setup Questions  
LSU Questionnaire  
Budget  
Personnel  
Internal Uploads & Routing

Tasks  
Proposal Tracking (PI)

Personnel

Add Personnel [hide]

Proposal Element Proposal Structure Institution Louisiana State University and ...

Personnel Type Key

Create Profile Name (Last, First) Role Co-PD/PI

Save

Person Months

PI	NAME/ROLE	MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS			CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
							CALENDAR	ACADEMIC	SUMMER			
(L13) Mike the Tiger PD/PI * Certifications and Training						Louisiana State University LSUAM   Sch of VETM   Pathobiological Sciences	0	0	0	🔒		



- 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.

Senior/Key		MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS			CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
PI	NAME/ROLE						CALENDAR	ACADEMIC	SUMMER			
(L14) Mike the Tiger PD/PI *	Certifications and Training			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Louisiana State University and A&M College LSUAM   Sch of VETM   Pathobiological Sciences	0	2	0			
Bob Nicholls SubAward PI	Certifications and Training			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Nicholls State University Nicholls State University	0	0	0			
Need to uncheck for Subaward senior/key personnel												
Non-Key		MAIL	ALERT	COI	RESPONSIBLE	ORGANIZATION / DEPARTMENT	PERSON MONTHS			CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
PI	NAME/ROLE						CALENDAR	ACADEMIC	SUMMER			
TBH	Graduate Student Certifications and Training			<input type="checkbox"/>	<input type="checkbox"/>	Louisiana State University and A&M College Louisiana State University and A&M College	6	0	0			

Legend:

- Prime
- SubAward - AM200151-subk-01 (Bob Nicholls)

- 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.

FORM/DOCUMENT NAME	EDIT	STATUS	UPLOAD	REMOVE
LSU Questionnaire (Read Only) (Proposal Documentation)	<input type="checkbox"/>	Incomplete		Mandatory
Review Summary (Proposal Documentation)	<input type="checkbox"/>	Incomplete		Mandatory

REVIEWER SUMMARY PAGE

Lock Form Validate Save

- **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.

g of creating a linked proposal Proposal AM230291  
 Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences | CC00293 (LA Department of Health (LQH))

**Internal Uploads & Routing** Completed

Step 1: Upload proposal documents required by the sponsor in this section (i.e. budget and budget justification) and any internal documents for OSP review under "Add Institution Forms/Supporting Documents."

Step 2: Open the Review Summary page, review and confirm all entered project information is correct. When done, please indicate so by clicking the "Lock Form" checkbox within the Reviewer Summary. This step is required to move the proposal into route.

Step 3: Please indicate the proposal is ready for routing by clicking the "Completed" checkbox and then Route Proposal by clicking the "Thumbs Up" icon.

Step 4: Click Accepted and then Submit to route the proposal.

Current Proposal Status: Pending

Components for Initial Application Pre-Review Route

FORM/DOCUMENT NAME	VIEW	STATUS	UPLOAD	REMOVE
LSU Questionnaire (Read Only) (Proposal Documentation)		Incomplete		Mandatory
Review Summary (Proposal Documentation)		Incomplete		Mandatory

[Add Institution Forms/Supporting Documents](#)

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

**Certification**

I have read and agree to the certifications on the Review Summary, if applicable.

Accepted  Declined

- **Step 5:** If units receiving Investigator Credit are not included in the Route, follow the steps below:
  - **Step 5a:** Insert route after Step 14



**Make sure to click on insert icon after Step 14. 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.**

Proposal **AM210067 - (L13) Mike the Tiger** "Sample Proposal" (Pending)

[Refresh Route](#)    Route Path - **Route Proposal**    [Add New Person to Review Path](#)   

Step 1	Gold/Purple Assignment	Dana Tuminello		<input type="button" value="5c"/>
	Gold/Purple Assignment	Rebecca Trahan		
	Gold/Purple Assignment	Ryan Russell Greer		
	Gold/Purple Assignment	Darya Delaune Courville		
	Gold/Purple Assignment	Tracy Wang		
<b>Step 14</b>	Investigators/Dept Heads/Deans	Dean Test		<input type="button" value="5a"/>
	Investigators/Dept Heads/Deans	(L13) Mike the Tiger		
	Investigators/Dept Heads/Deans	Department Head Test		

- **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.

**Add step**           

Informational Only  
 Approval Required

- **Step 5c:** Inserted Investigator will appear after Step 14. Click Submit in top right to route the proposal.

Proposal **AM210067 - (L13) Mike the Tiger** "Sample Proposal" (Pending)

[Refresh Route](#)    Route Path - **Route Proposal** [Add New Person to Review Path](#)   

Step 1	<b>Gold/Purple Assignment</b>	Dana Tuminello	
	<b>Gold/Purple Assignment</b>	Rebecca Trahan	
	<b>Gold/Purple Assignment</b>	Ryan Russell Greer	
	<b>Gold/Purple Assignment</b>	Darya Delaune Courville	
	<b>Gold/Purple Assignment</b>	Tracy Wang	
Step 14	<b>Investigators/Dept Heads/Deans</b>	Dean Test	
	<b>Investigators/Dept Heads/Deans</b>	(L13) Mike the Tiger	
	<b>Investigators/Dept Heads/Deans</b>	Department Head Test	
<b>Inserted Step</b>	<b>Inserted Step</b>	(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.

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

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 Renee 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			Darya 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			
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				