

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

Creating Other Miscellaneous Agreements

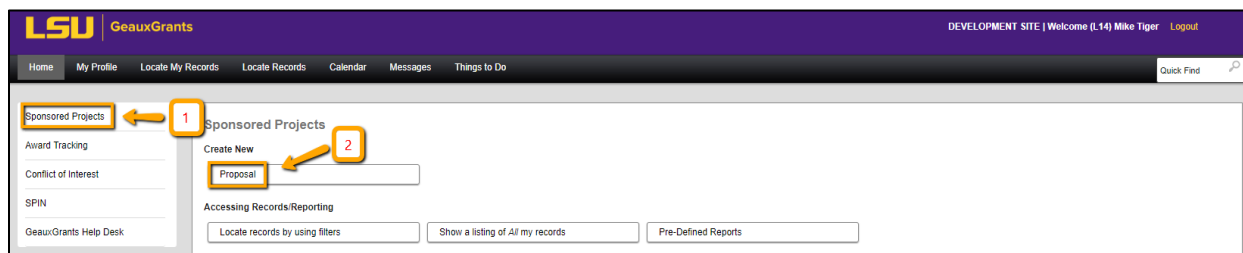
Other Miscellaneous Agreements are Non-Monetary Agreements which are related to ongoing research or sponsored projects which fall under the purview of LSU’s Office of Sponsored Programs (OSP). Examples include: Basic/Master Agreements, Teaming Agreements, Memorandums of Understanding, National Lab User 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.

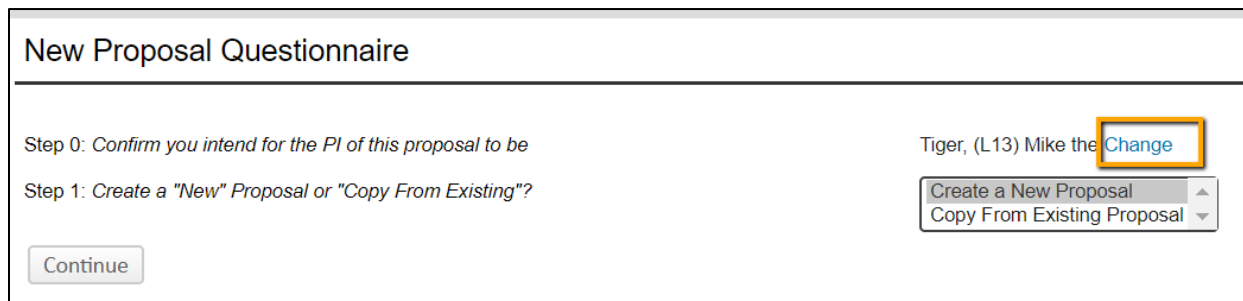
Individuals with a GeauxGrants role of Department Administrators need to initiate Modification Requests. Please work with your department/college grant coordinator to initiate the request. If you do not have a coordinate, then contact OSP.

- 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.



- 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://lsu.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

New Proposal Questionnaire Back

Step 0: Confirm you intend for the PI of this proposal to be Tiger, (L17) Mike the [Change](#)

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

Step 2: Proposal Type Other Miscellaneous Agreements

Step 3: Selected Sponsor Shell

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

Step 5: Proposal's Title

[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 Tiger, (L17) Mike the [Change](#)

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

Step 2: Proposal Type Other Miscellaneous Agreements

Step 3: Selected Sponsor Shell

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

Step 5: Proposal's Title Shell master Agreement

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

[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 Tiger, (L17) Mike the [Change](#)

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

Step 2: Proposal Type Other Miscellaneous Agreements

Step 3: Selected Sponsor Shell

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

Step 5: Proposal's Title Shell master Agreement

Step 6: Project Start and End Dates 01-Nov-2024 to 31-Oct-2026

Step 7: Number of Budget Periods 2

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.

[Step back through responses](#)

Setup Questions

- If you selected Other Miscellaneous Agreement on the setup questions the screen template should default to other agreement template.

Shell master Agreement
 Test (L17) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences | CC00293 (Shell) Proposal AM250329

Setup Questions Show Reset Defaults

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 Change

Deadline Information

Is there a Deadline for this Submission? [?] Yes No

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

Associated Departments [?] LSUAM | Sch of VETM | Pathobiological Sciences | CC00293
Add

PI Departments [?] LSUAM | Sch of VETM | Pathobiological Sciences | CC00293
Add

- When routing an amendment to a Prior Other Miscellaneous Agreement, you will need to click show at the top right, then click look up next to link to existing proposal to search for original Other Miscellaneous Agreement.

Setup Questions Hide

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 Change

Is this a Flow Through Project? [?] Yes No

Please select a Submission Mechanism/Screen Template Other Miscellaneous Agreement [?]

Is this a US federal sponsored project? [?] Yes No

Will this be a proposal to PHS, NIH or one of the branches of NIH? [?] Yes No

Has your sponsor given a specific reference for this proposal? [?] Yes No

Is this an un-solicited application? [?] Yes No

Deadline Information

Is there a Deadline for this Submission? [?] Yes No

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 | CC00293
Add

PI Departments [?] LSUAM | Sch of VETM | Pathobiological Sciences | CC00293
Add

Associated Centers/Programs [?]

Link to existing proposal None Identify **Look Up**

- This will pull up the master proposal look up for the PI. Click the correct agreement.

Select Master Proposal Close

Sponsor name	Institution #	Sponsor Award #	Title
Foundation for Louisiana	AM241056		Test for adding other Agreement
American Forest Foundation	AM241063		test for DHS hazard
National Institutes of Health (NIH)	AM241066		Proposal Guides
Foundational Questions Institute (FQXi)	AM241067		test for Other Misc agreement
Federal Railroad Administration	AM241069		Test for 1176
Foundation for Louisiana	AM241070		Test for 1087 - hs link

◀ ◁ 1 ▷ ▶
20 items per page
1 - 6 of 6 items

- The proposal number will update to be next iteration in line (Ex. AM240001-01)
- Complete all other required fields.

Submission Mechanism/Form Information

Proposal Sponsor ? Foundational Questions Institute (FQXi) [Change](#)

Deadline Information

Is there a Deadline for this Submission? ? Yes No

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

Associated Departments ? LSUAM | Sch of VETM | Pathobiological Sciences | CC00293
[Add](#)

PI Departments ? LSUAM | Sch of VETM | Pathobiological Sciences | CC00293
[Add](#)

- 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 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.

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

PI Departments LSUAM | Sch of VETM | Pathobiological Sciences

Department

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.

Shell Master Agreement (113) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company) Proposal AM200202

Personnel Completed

Add Personnel (hide)

Prime Institution

Personnel Type

Create Profile

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.

Completed

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 Submit Button.

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

Current Proposal Status: Pending

Components for Initial Application

FORM/DOCUMENT NAME	VIEW	STATUS	UPLOAD	REMOVE
LSU Agreement Questionnaire (Proposal Documentation)		Incomplete		Mandatory

[Add Institution Forms/Supporting Documents](#)

LSU Agreement Questionnaire

LSU MISCELLANEOUS AGREEMENT QUESTIONNAIRE

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

Proposal #: AM250329

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.
- To indicate a related record, Click yes for Question 12 and hit the plus icon to bring up the prompt to search a proposal.

OSP REVIEW INFORMATION:

* 12) Is this related to an existing sponsored project award or proposals?
 Yes No

* Please add and search for your proposal using the + button

Proposal Number	Title	PI	Sponsor	Status	
					+

- You can search by proposal number or Any of the other filters if you do not know the proposal number

Add Proposal Close

Select by Number

Apply Filters Go Clear All

Browse By

Sponsor/Scheme	<input type="text"/> Set	Sponsor Type	<input type="text"/> Set
Primary Center/Program	<input type="text"/> Set	Center/Program	<input type="text"/> Set
Principal Investigator	<input type="text"/> Set	Investigator	<input type="text"/> Set
Primary Assoc. Dept.	<input type="text"/> Set	PI Department	<input type="text"/> Set

Proposal Status Select All

<input checked="" type="checkbox"/> Created (in PT)	<input checked="" type="checkbox"/> Pending	<input checked="" type="checkbox"/> Deleted
<input checked="" type="checkbox"/> Routing	<input checked="" type="checkbox"/> Returned for Revision	<input checked="" type="checkbox"/> Returned Without Review
<input checked="" type="checkbox"/> Routing Approvals Received	<input checked="" type="checkbox"/> Withdrawn by PI	<input checked="" type="checkbox"/> Disapproved
<input checked="" type="checkbox"/> Approved to Submit	<input checked="" type="checkbox"/> Revised	<input checked="" type="checkbox"/> Award Received
<input checked="" type="checkbox"/> Submitted	<input checked="" type="checkbox"/> Other Agreement Awarded	<input checked="" type="checkbox"/> Tentative Grant Request
<input checked="" type="checkbox"/> Awarded to PI	<input checked="" type="checkbox"/> Converted Award Received	<input checked="" type="checkbox"/> Historical
<input checked="" type="checkbox"/> Declined		
<input checked="" type="checkbox"/> Mod Request Approved		
<input checked="" type="checkbox"/> Withdrawn		
<input checked="" type="checkbox"/> Module Admin Only		

- Once you find the record, Hit Select checkbox and the select button.

Number	Title	Record creation date	PI	Select
AM241056	Test for adding other Agreement	05-Apr-2024	Tiger, (L17) Mike the	<input checked="" type="checkbox"/>

1 - 1 of 1 items

- 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).

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 Completed

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 Submit Button.

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

Current Proposal Status: Pending

Components for Initial Application Pre-Review Route: Agreement Route

FORM/DOCUMENT NAME	VIEW	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

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

Pre-Review Route: Agreement Route

- Click Accept and then Continue.

Certification

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

Accept Decline

- If additional reviewers/approvers need to be inserted, follow the steps below:
 - Step 1: Insert route after Step 15.



Make sure to click on insert icon after Step 15. 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

Step 2 Begin typing name here.

Informational Only

Approval Required

- Step 3: Inserted Approver will appear after Step 15. Click Submit in top right to route the Other Agreement.

Proposal AM250329 - Test (L17) Mike the Tiger "Shell master Agreement" (Pending)

Refresh Route **Route Path - Agreement Route** Add New Person to Review Path Submit

Step	Assignment	Name	Status	Action
Step 1	Gold/Purple Assignment	Ryan Russell Greer	Information Only	Insert After
	Gold/Purple Assignment	Dana Tuminello	Information Only	Insert After
	Gold/Purple Assignment	Darya Delaune Courville	Information Only	Insert After
	Gold/Purple Assignment	Tracy Wang	Information Only	Insert After
Step 12	Investigators/Dept Heads/Deans	Rebecca Trahan	Information Only	Insert After
	Investigators/Dept Heads/Deans	Test (L4) Mike the Tiger	Approval Required	Insert After
	Investigators/Dept Heads/Deans	Test (L17) Mike the Tiger	Approval Required	Insert After
	Investigators/Dept Heads/Deans	Unit Department Head	Approval Required	Insert After
	Investigators/Dept Heads/Deans	Test (L5) Mike the Tiger	Approval Required	Insert After
Investigators/Dept Heads/Deans	Unit Department Head	Approval Required	Insert After	
Inserted Step	Inserted Step	Test (L8) Mike the Tiger	Approval Required	Insert After Remove

Step 3 (yellow box with arrow pointing up)

Step 1 (yellow box with arrow pointing left)

- 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.

Internal Uploads & Routing Completed

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 Submit Button.

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

Current Proposal Status: Routing

Components for Initial Application ➔

Current Submission

FORM/DOCUMENT NAME	VIEW	STATUS	UPLOAD	REMOVE
LSU Agreement Questionnaire (Proposal Documentation)		Completed		Mandatory
Test Upload 1.docx (Other Documentation)		Completed		X

[Add Institution Forms/Supporting Documents](#)

Active Routing Progress Open Full

AM250329 - Test (L17) Mike the Tiger"Shell master Agreement"

Submitted by Josh Steven Boudreaux on behalf of Test (L17) Mike the Tiger

Route Name	Route Type	Step Number/Name	Who	Notified	Notification Type	Decision	Insert
Agreement Route	Pre-Review	Step 1 - Gold/Purple Assignment	Ryan Russell Greer	11-Oct-2024 10:26:25 AM	Information Only	Informed	-
Agreement Route	Pre-Review		Dana Tuminello	11-Oct-2024 10:26:26 AM	Information Only	Informed	-
Agreement Route	Pre-Review		Darya Delaune Courville	11-Oct-2024 10:26:27 AM	Information Only	Informed	-
Agreement Route	Pre-Review		Tracy Wang	11-Oct-2024 10:26:27 AM	Information Only	Informed	-