

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

Creating Other Miscellaneous Agreements

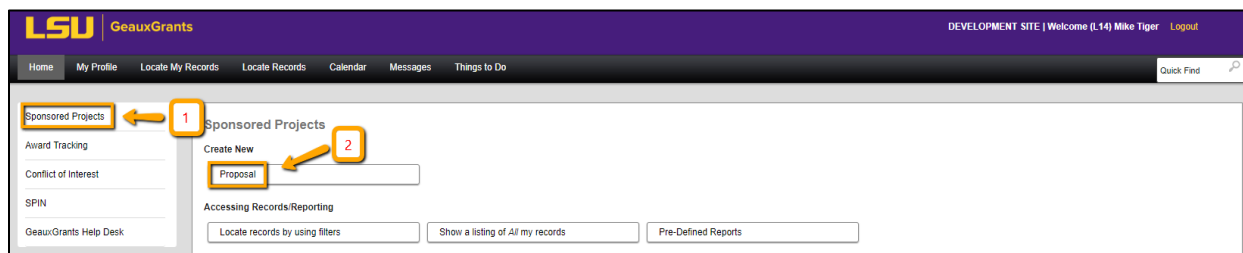
Other Miscellaneous Agreements are Non-Monetary Agreements which are related to ongoing research or sponsored projects which fall under the purview of LSU’s Office of Sponsored Programs (OSP). Examples include: Basic/Master Agreements, Teaming Agreements, Memorandums of Understanding, National Lab User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

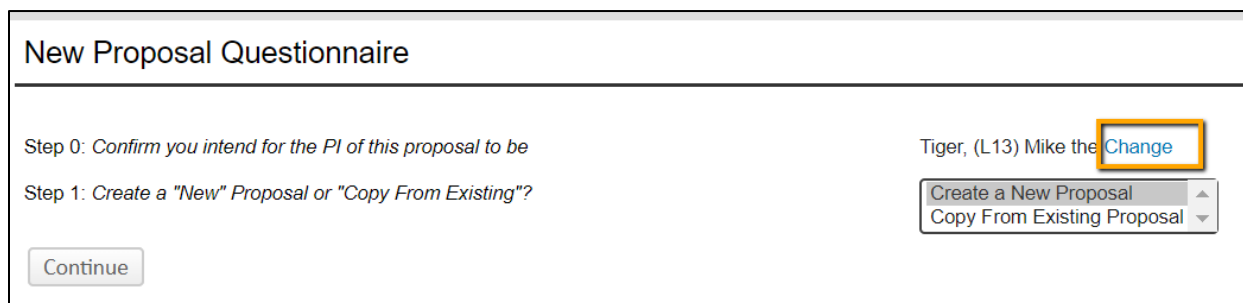
Individuals with a GeauxGrants role of Department Administrators need to initiate Modification Requests. Please work with your department/college grant coordinator to initiate the request. If you do not have a coordinate, then contact OSP.

- 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

New Proposal Questionnaire

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

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

Continue

Create a New Proposal
Copy From Existing Proposal

- Step 1 Continued: Choose Setup Proposal Manually 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"?

Step 1: Continued

Create a New Proposal

Setup Proposal Manually

Continue

- Step 2: Choose Proposal Type of “Other Miscellaneous Agreement” and 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"?

Step 2: Please Select a Proposal Type

Other Miscellaneous Agreement

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://isu.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, (L13) Mike the Change

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

Step 2: Proposal Type

Step 3: Select a Sponsor

Shell Oil Company

Continue

- 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, (L13) Mike the Change

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

Step 2: Proposal Type

Step 3: Selected Sponsor

Step 4: "Tracking" Number or "Proposal" Number

Step 5: Proposal's Title

Create a New Proposal

Other Miscellaneous Agreements

Shell Oil Company

This proposal will be automatically numbered.

Shell Master Agreement

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, (L13) 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 Oil Company

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: 01-Jan-2020

To: 31-Dec-2024

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, (L13) 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 Oil Company

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-Jan-2020 to 31-Dec-2024

Step 7: Number of Budget Periods 5

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: Create Proposal

Setup Questions

- Click Show to expose the screen template.

Done Save Shell Master Agreement (L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company) Proposal AM200202

Setup Questions

Please answer all questions below and click SAVE.

This proposal is broken down into several sections based upon what the institution requires. Once each section is complete, please indicate so by clicking the Completed checkbox in the upper right corner of the section.

If any changes are needed, please contact the Office of Sponsored Programs at osp@lsu.edu.

If this is a Modification Request, please click 'Show' at the top of the page and select the Modification Request Template.

If this is an Other Miscellaneous Agreement, please click 'Show' at the top of the page and select the Other Miscellaneous Agreement Template.

Show Reset Defaults

- From the Submission Mechanism/Screen Template select Other Miscellaneous Agreement.

Done Save Shell Master Agreement (L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company) Proposal AM200202

Setup Questions

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 Oil Company Change

Is this a Flow Through Project? Yes No

Please select a Submission Mechanism/Screen Template Other Miscellaneous Agreement

- You will receive the following warning. Click OK.

You are changing the submission mechanism for this proposal. There may be previously completed components of this proposal that might have to be re-done because of formatting differences between the two mechanisms.

OK

Cancel

- This will change your screen to the Other Miscellaneous Agreement view. Complete all 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 Yes No

Animals? ?

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

[Add](#)

PI Departments ?

LSUAM | Sch of VETM | Pathobiological Sciences

[Add](#)

Department Select Close

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

Done Save

Setup Questions Personnel Internal Uploads & Routing Tasks Proposal Tracking (PT)

Personnel Completed Edit Mode

Add Personnel (hide)

Prime Proposal Structure Institution Louisiana State University and A

Personnel Type Key

Create Profile Name (Last, First) Billiot, Gina Larpenier - 897144545 - LSUAM | O Role Co-PD/PI Save

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.

Shell Master Agreement (13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company) Proposal AM200202

Done Save

Setup Questions Personnel Internal Uploads & Routing Tasks Proposal Tracking (PT)

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 'Thumbs Up' icon.

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

Current Proposal Status: Pending

Components for Initial Application

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

Add Institution Forms/Supporting Documents

LSU Agreement Questionnaire

- These questions are similar to the SPS Coversheet.

The screenshot shows the top portion of the LSU Miscellaneous Agreement Questionnaire. At the top left is the LSU logo. On the right, there are buttons for 'Lock Form', 'Validate', and 'Save'. A purple sidebar on the left contains the text 'LSU MISCELLANEOUS AGREEMENT QUESTIONNAIRE' and 'ALL PAGES'. The main content area is titled 'LSU MISCELLANEOUS AGREEMENT QUESTIONNAIRE' and includes the instruction: 'ANSWER ALL QUESTIONS AND COMPLETE ALL REQUIRED FIELDS (*). WHEN DONE, CHECK COMPLETE AT TOP RIGHT OF PAGE.' Below this, the 'Proposal #' is AM200202. A paragraph explains that certain Miscellaneous, Non-Monetary Agreements are related to ongoing research or sponsored projects and fall under the purview of LSU's Office of Sponsored Programs (OSP). The form contains three main sections: 1. 'Agreement Title:' with a text input field containing 'Shell Master Agreement'. 2. 'Description / Purpose of Agreement' with a large empty text area. 3. 'Select Type of Request:' with radio button options: 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), and h) Other. Below these is the 'COMPLIANCE INFORMATION' section, starting with question 12: 'Human Subjects records or samples? (Please go back to Setup Questions tab to change answer if needed)'. The 'Yes' checkbox is unchecked, and the 'No' checkbox is checked.

- 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.

This screenshot shows the 'OSP REVIEW INFORMATION' section of the questionnaire. Question 12 is 'Is this related to an existing sponsored project award or proposals?'. The 'Yes' checkbox is checked and highlighted with a yellow box. Below the question, there is a prompt: 'Please add and search for your proposal using the + button'. A yellow arrow points to a plus sign icon (+) located to the right of the prompt. Below this is a table with columns for 'Proposal Number', 'Title', 'PI', 'Sponsor', and 'Status'. The table is currently empty.

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

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

Number	Title	Record creation date	PI
AM241056	Test for adding other Agreement	05-Apr-2024	Tiger, (L17) Mike the

Navigation: 1 | 20 items per page | 1 - 1 of 1 items

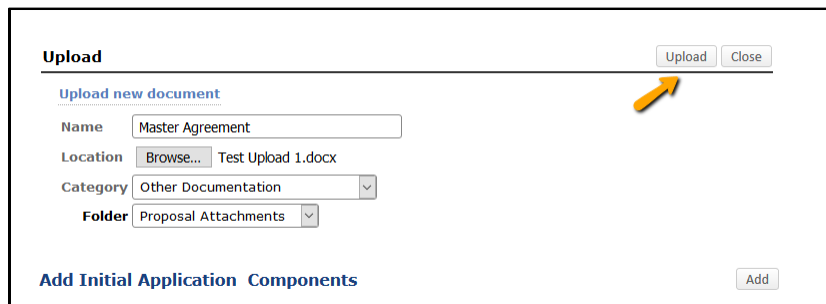
Buttons: Select (top right), Select (bottom right), Select (checkbox in row)

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

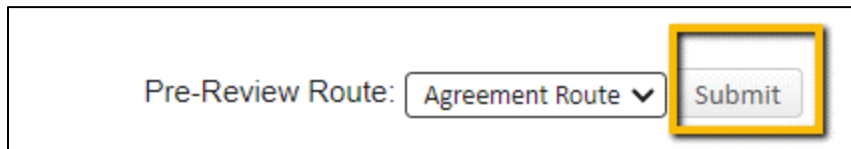
- Upload a copy of the Agreement and any other documentation by clicking “Add Institution Forms/Supporting Documents.”



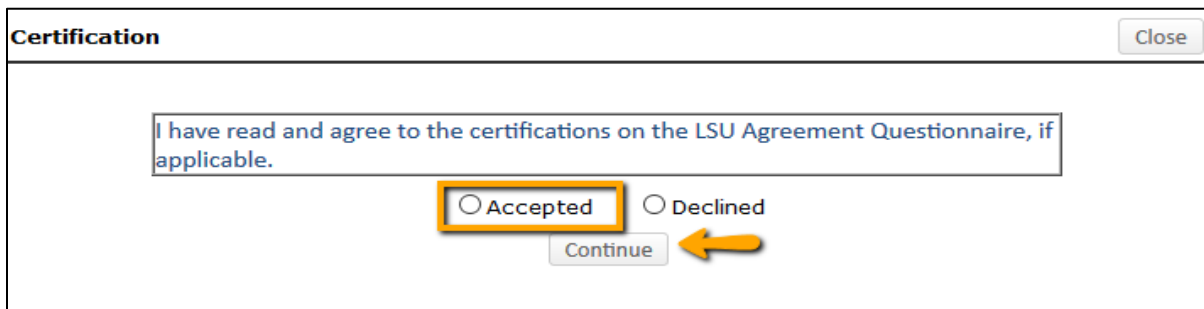
- Select Category of Other Documents and Folder of Proposal Attachments. Click Upload. Click Close when done.



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



- Click Accepted and then Continue.



- If additional reviewers/approvers need to be inserted, follow the steps below:
 - Step 1: Insert route after Step 12.



Make sure to click on insert icon after Step 12. 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.

- Step 3: Inserted Approver will appear after Step 12. Click Submit in top right to route the Other Agreement.

Proposal **AM220181 - Test (L17) Mike the Tiger "Shell Master Agreement (Test Proposal)"** (Pending)

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

Step 1	Gold/Purple Assignment	Dana Tuminello	
	Gold/Purple Assignment	Ryan Russell Greer	
	Gold/Purple Assignment	Rebecca Trahan	
	Gold/Purple Assignment	Tracy Wang	
	Gold/Purple Assignment	Darya Delaune Courville	
Step 7	Export Controls	Andrew Curtis Lawson	
	Export Controls	Elizabeth Antolik Cadarette	
	Export Controls	Debra Keppler	
Step 12	Investigators/Dept Heads/Deans	Test (L17) Mike the Tiger	
	Investigators/Dept Heads/Deans	Dr. Konstantin G Kousoulas	
	Investigators/Dept Heads/Deans	Test (L5) Mike the Tiger	
	Investigators/Dept Heads/Deans	Test (L4) Mike the Tiger	
	Investigators/Dept Heads/Deans	Joseph Francis	
Inserted Step	Inserted Step	Test (L16) Mike the Tiger	

Yellow callouts: 'Step 3' points to the Submit button; 'Step 1' points to the insert icon in the last row.

- 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.

Shell Master Agreement
(L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Shell Oil Company)

Proposed AM200202

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 'Thumbs Up' icon.

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

Current Proposal Status: Routing

Components for Initial Application

Current Submission

FORM/DOCUMENT NAME	EDIT	STATUS	UPLOAD	REMOVE
LSU Agreement Questionnaire (Proposal/Documentation)		Completed		Mandatory
Master Agreement (Other Documentation)		Completed		

[Add Institution Forms/Supporting Documents](#)

Active Routing Progress [Open Full](#)

AM200202 - (L13) Mike the Tiger "Shell Master Agreement"

Submitted by (L14) Mike the Tiger on behalf of (L13) Mike the Tiger

Route Name	Route Type	Step Number/Name	Who	Notified	Decision	Insert	Remove
Agreement Route	Pre-Review	Step 1 - Gold/Purple Assignment	Rebecca Trahan	22-Nov-2019 8:58:54 AM	Informed -		
Agreement Route	Pre-Review		Ryan Russell Greer	22-Nov-2019 8:58:55 AM	Informed -		
Agreement Route	Pre-Review		Darya Deleune Courville	22-Nov-2019 8:58:56 AM	Informed -		
Agreement Route	Pre-Review		Dana Tuminello	22-Nov-2019 8:58:56 AM	Informed -		
Agreement Route	Pre-Review		Tracy Wang	22-Nov-2019 8:58:57 AM	Informed -		
Agreement Route	Pre-Review	Step 10 - Investigators/Dept Heads/Deans	(L13) Mike the Tiger	22-Nov-2019 8:58:58 AM			