Creating Linked Proposals

Follow these instructions when creating a proposal that is associated with an existing record. Examples includes: Continuation-New, Continuation-Non-Competing (e.g. NIH RPPR), Supplements, Revisions (prior to receipt of an award) or New Proposals when a Notice/Letter of Intent or Pre-proposal was previously routed. These are referred to as Child Submissions throughout this document.

These instructions are not to be used for Resubmissions. Follow either the Creating Manual Proposals or Creating Grants.gov Proposals instructions, as applicable.

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

Helpful tips for Creating a Linked Proposal

- Know the proposal number for the award that you are requesting to link your proposal to.
- 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.
- Hit Done button on top left to close out the proposal instead of closing browser using X on top right.
New Proposal Questionnaire – Creating Child Submission from Converted SPS Records

- The first proposal created from an SPS record will need to follow these steps for the 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 that applies to your proposal (i.e. Supplement, Revision, Continuation-New, Continuation-Non-Competing). 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.
- Step 4: Will be automatically numbered by the system
- Step 5: Enter Proposal’s Title from SPS record and click Continue

- Step 6: Enter Budget Start and End Dates for this proposal and click Continue

- 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.
New Proposal Questionnaire – Creating Child Submission from GeauxGrants Records

- Once the previous submission (transaction) has been created in Proposal Development, you will follow these steps for the New Proposal Questionnaire.

- Step 0: Defaults to user. Change to the Principal Investigator (PI) by clicking Change. Type last name, first name of PI and click Select.

- Step 1: Click on “Copy From Existing Proposal” and click Continue.

- Step 1 Continued: Enter Proposal number in box. Make sure to use the most recent submission (transaction) if more than one submission (e.g. AM200150-01). If you use the browse function, results appear at the bottom of the screen. Do not check “Include all Proposal Attachments.” Click Continue.
The PI in Step 1 will automatically change once you copy the proposal. If you had not updated the PI in Step 0, then you will get this warning message. Click OK.

Step 2: Choose Proposal Type that applies to your proposal (i.e. Supplement, Revision, Continuation-New, Continuation-Non-Competing). Click Continue.

Step 3 and 4: Auto populates

Step 5: Copy proposal title from Step 1: Continued. Click Continue.
**Steps 6-7: Auto Populate**

- **Click Create Proposal.**

**Setup Questions**

- 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.

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

- For proposals associated with SPS converted records, GeauxGrants will automatically generate a Proposal/Record/Institution#. GeauxGrants numbering will be AMFYXXXX. For Fiscal Year (FY) 2022, all numbers begin with AM22.

- For proposals copied from a record in GeauxGrants, all tabs and information from the previous GeauxGrants proposal you copied will appear. If you previously submitted via Grants.gov and are now doing a manual proposal, you will need to switch the screen mechanism.
• Department Administrators and OSP will have the ability to Show hidden fields. Click Show to link the proposal and change the screen mechanism.

Changing Screen Mechanism:

• Step 1 – Click Show in top right. If you do not have this button, then contact your Department Administrator or OSP.

• Step 2 – Under Submission Mechanism/Form Information change Submission Mechanism/Screen Template to Generic Proposal Template.

• Step 3 – You will get a warning message. Click OK.
Link Proposal to Master Submission (first submission)

- Step 1 – Under General Proposal Properties, next to Link to existing proposal, Click Look Up.

- Step 2 – This will bring up a list of all of the PI’s proposals. Under Institution column, click on funnel to filter to the proposal number you have copied.

- Step 3 – Click on record to populate Setup Questions tab with linked proposal. This copies all previous data into the record.
• Step 4 - The proposal number now changes to the next child submission (previously transaction). For records created from SPS converted records, the numbering will not be correct. In the example below, the next transaction/submission should be 49318-2 instead of the auto numbering of 49318-1-01. Contact osp@lsu.edu to correct the institution number before you route the request.

![Proposal Form Screenshot]

• Read instructions at the top of the page, answer all questions. Click Save at any point to preserve all data entered. Clicking Completed will validate form and will prompt user to save changes by clicking OK.

• 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, 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 Show on top right. **NOTE:** Show button is only available to Department Administrators and OSP.

• 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.

- 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.

- Click Add to add the additional department. This field is progressive text and you only need to enter part of name to populate. Click Select.

**NOTE:** If you copied from a previous proposal, some things may need to be updated. For example, if you are linking a new continuation by copying from previous record, then the budget period and tuition remission rate should be updated to the new time and current tuition remission rate.
LSU Questionnaire, Budget, Personnel, Internal Uploads & Routing tabs