

Creating Linked Proposals (Ex. Revisions, Continuations, Supplements)

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.

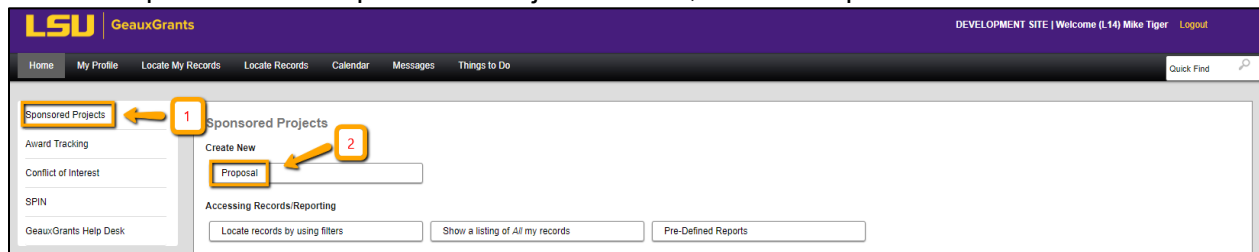
For a description of the different proposal types see the GeauxGrants Help Desk Sponsored Programs FAQ under Creating Proposals.

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 record 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

- 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.

The screenshot shows the 'New Proposal Questionnaire' form. At the top, it says 'New Proposal Questionnaire'. Below that, there are two steps:

- Step 0: *Confirm you intend for the PI of this proposal to be* Tiger, (L13) Mike the Change. There is a 'Change' link next to the name.
- Step 1: *Create a "New" Proposal or "Copy From Existing"?* There is a dropdown menu with two options: 'Create a New Proposal' and 'Copy From Existing Proposal'. A yellow arrow points to the 'Copy From Existing Proposal' option.

At the bottom left, there is a 'Continue' button with a yellow arrow pointing to it.

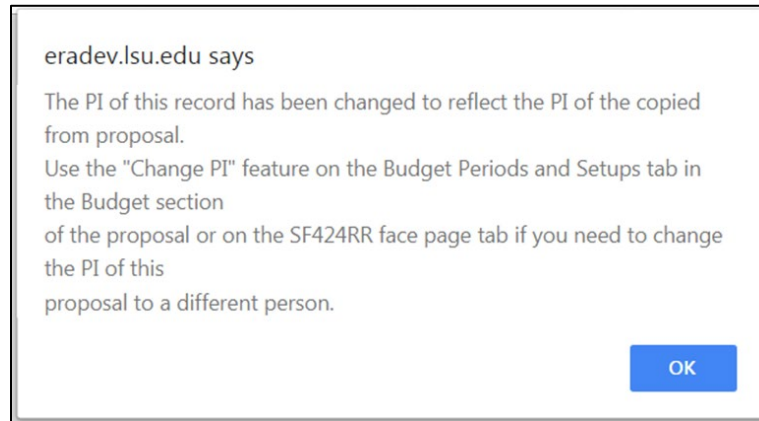
- Step 1 Continued: Enter Proposal number in box. Make sure to use the most recent submission (transaction) if more than one submission (e.g. AM200150-01). If you use the browse function, results appear at the bottom of the screen. Do not check “Include all Proposal Attachments.” Click Continue.

The screenshot shows the 'New Proposal Questionnaire' form. At the top, it says 'New Proposal Questionnaire'. Below that, there are three steps:

- Step 0: *Confirm you intend for the PI of this proposal to be* Tiger, (L14) Mike the Copy from Existing Proposal. A yellow arrow points to the 'Copy from Existing Proposal' text.
- Step 1: *"New" or "Copy From Existing"?*
- Step 1: *Continued*. There is a text input field containing 'AM200150' and a 'Browse' button next to it. A yellow arrow points to the input field.

Below the input field, there is a checkbox labeled 'Include all Proposal Attachments' which is unchecked. At the bottom left, there is a 'Continue' button with a yellow arrow pointing to it.

- 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.

New Proposal Questionnaire Back

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

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

Step 1: *Continued* Copy from Proposal AM200011 - *Compliance Approvals Test proposal*

Step 2: *Please Select a Proposal Type*

New

New

Continuation-New

Supplement

Continuation-Noncompeting

Renewal

Revision

Resubmission

Notice/Center of Intent

Pre-proposal

Modification/Prior Approval Request

Other Miscellaneous Agreements

- Step 3 and 4: Auto populates
- Step 5: Copy proposal title from Step 1: Continued. Click Continue.

New Proposal Questionnaire

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

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

Step 1: *Continued* Copy from Proposal AM200011: **Compliance Approvals Test proposal**

Step 2: *Proposal Type* Supplement

Step 3: *Selected Sponsor* LA Board of Regents (BOR)

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

Step 5: *Proposal's Title*

Compliance Approvals Test proposal

- Steps 6-7: Auto Populate
- Click Create Proposal.

Setup Questions

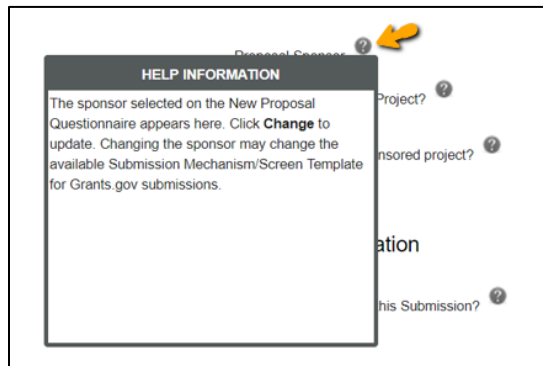
- This tab gathers general information about your proposal. After you complete this section, additional proposal tabs will appear to the left of the screen.



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.



- For proposals associated with SPS converted records, GeauxGrants will automatically generate a Proposal/Record/Institution #. GeauxGrants numbering will be AMFYXXXXXX. For Fiscal Year (FY) 2023, all numbers begin with AM23.
- 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.

Changing Screen Mechanism:

- Step 1 – Click Show in top right.



This is a test manual proposal
(L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Alfred P. Sloan Foundation)

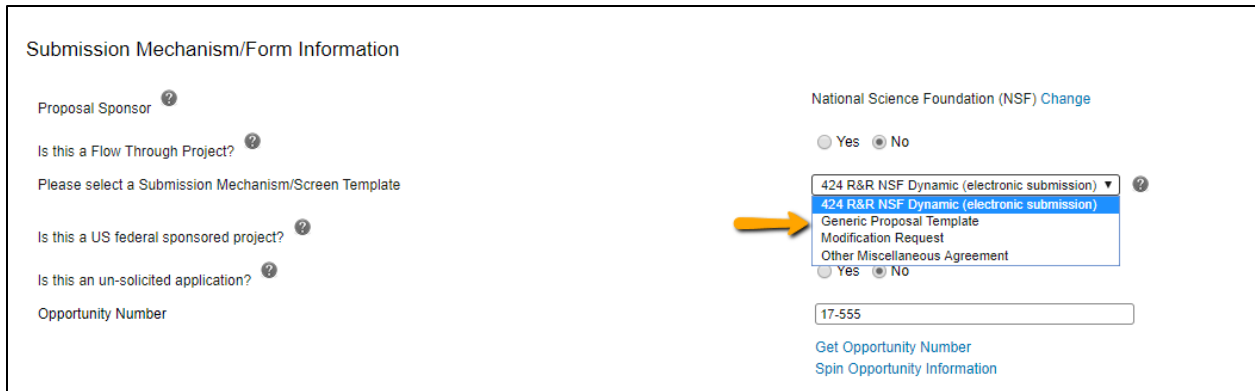
Proposal AM200191

Setup Questions Setup Questions

Show Reset Defaults

Please answer all questions below and click SAVE

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



Submission Mechanism/Form Information

Proposal Sponsor [?] National Science Foundation (NSF) [Change](#)

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

Please select a Submission Mechanism/Screen Template

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

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

Opportunity Number 17-555

[Get Opportunity Number](#)
[Spin Opportunity Information](#)

424 R&R NSF Dynamic (electronic submission) [?]

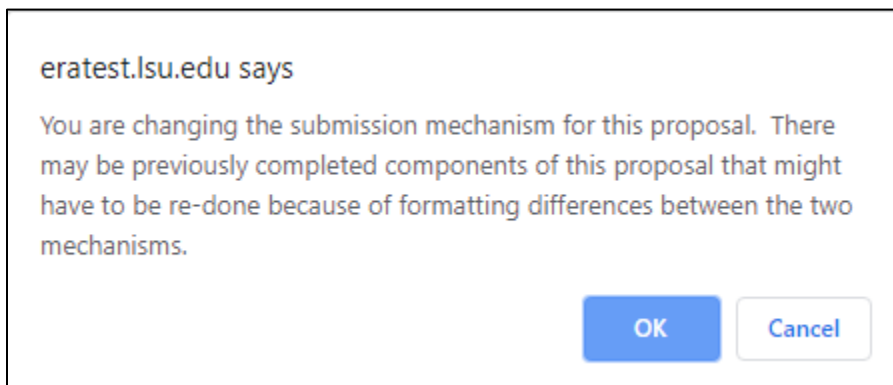
424 R&R NSF Dynamic (electronic submission)

Generic Proposal Template

Modification Request

Other Miscellaneous Agreement

- Step 3 – You will get a warning message. Click OK.



eratest.lsu.edu says

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

Link Proposal to Master Submission (first submission)

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

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 [Add](#)

PI Departments [Add](#)

Associated Centers/Programs [Add](#)

Link to existing proposal [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.

Select Master Proposal Close

Sponsor name	Institution #	Sponsor Award #	Title
National Science Foundation (NSF)	49900-1		NSF Grants.gov Proposal
LA Board of Regents (BOR)	AM200011		Finance Approvals Test proposal
LA Board of Regents (BOR)	AM200012		Proposal with Cost Sharing
National Aeronautics & Space Administration (NASA)	AM200016		Danielle Cintron
LA Board of Regents (BOR)	AM200018		Manual Proposal
National Institutes of Health (NIH)	AM200024		NIH Grants.gov proposal
National Aeronautics & Space Administration (NASA)	AM200030		Proposal

20 items per page 1 - 7 of 7 items

- Step 3 – Click on record to populate Setup Questions tab with linked proposal. This copies all previous data into the record.

AM230282 - Test proposal for Upgrade Proposal

Test (L17) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences | CC00293 (LA Department of Health (LDH))

[Show](#) [Reset Defaults](#) Completed

Setup Questions

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 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.

If the 'Show' button is not available or changes are needed, please contact your departmental grant administrator or the Office of Sponsored Programs at osp@lsu.edu.

Submission Mechanism/Form Information

LA Department of Health (LDH)

- 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. This institution number will appear on all routing emails.

AM230282 - Test proposal for Upgrade
 Test (L17) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences | CC00293 (LA Department of Health (LDH))

Proposal 49318-1-01

Setup Questions

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 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.

If the 'Show' button is not available or changes are needed, please contact your departmental grant administrator or the Office of Sponsored Programs at osp@lsu.edu.

Submission Mechanism/Form Information

LA Department of Health (LDH)

Proposal Sponsor

- 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.

This is a test manual proposal
 (L13) Mike the Tiger - LSUAM | Sch of VETM | Pathobiological Sciences (Alfred P. Sloan Foundation)

Proposal AM200191

Setup Questions

Please answer all questions below and click SAVE

Show Reset Defaults

- 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 



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 [?] 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 department. This field is progressive text and you 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 



Filter by Institution

Louisiana State University and Agricultural and Mechanical College ▾



You must click Show each time you add a unit to add additional units.

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, tuition remission rate, and F&A should be updated to the new dates and rates, if applicable.

LSU Questionnaire, Budget, Personnel, Internal Uploads & Routing tabs

Follow instructions in [Creating Manual Proposal](#) How To document.