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 0: Confirm you intend for the PI of this proposal to be
Step 1: Create a “New” Proposal or “Copy From Existing”?

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.

TIP! 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
Step 6: Enter Agreement Start and End Dates and click 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.

Setup Questions

Click Show to expose the screen template.

From the Submission Mechanism/Screen Template select 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.

- This will change your screen to the Other Miscellaneous Agreement view. Complete all required fields.
- 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 and then 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.
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.

**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.
LSU Agreement Questionnaire

- These questions are similar to the SPS Coversheet.

**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 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:**

- [ ] Basic / Master Agreement
- [ ] Teaming Agreement
- [ ] Memorandum of Understanding
- [ ] National Lab User Agreement
- [ ] Data Use Agreement (NIH only)
- [ ] Collaboration Agreement
- [ ] Cooperative Research and Development Agreements (CRADA)
- [ ] Other

**COMPLIANCE INFORMATION.**

- [ ] Human Subjects records or samples? (Please go back to Setup Questions tab to change answer if needed)

- To change the title, enter new title in the Proposal Title box.
- 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 thumbs up icon by Submit Pre-Review.
- Click Accepted and then Continue.

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

  **TIP!** 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.
- 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.