Creating Post Award Modification/Prior Approval Requests from records created in GeauxGrants

Modification Requests are post award prior approval requests either submitted to the sponsor or internal prior approval. These must be routed in GeauxGrants for review and approval prior to submission to the sponsor. OSP-2 forms will no longer be needed for post award Modification Requests.

This user guide provides instructions on creating modification requests for proposals created in GeauxGrants. See separate instructions for creating modification requests converted from SPS.

How to Create a Proposal Development (PD) Record

It is recommended that you use Chrome or Firefox for GeauxGrants. Login through my LSU

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

Helpful tips for Creating a Modification/Prior Approval Request

- Know the proposal number for the award that you are requesting a modification/prior approval request.
- 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 Modification Request 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 “Modification/Prior Approval Request” and Click Continue

• Step 3: Auto populates

• Step 4: Auto populates

• Step 5: Copy proposal title from Step 1: Continued. Click Continue.

• Steps 6-7: Auto Populate

• Click Create Proposal.
Setup Questions

- All tabs and information from the previous GeauxGrants proposal you copied will appear.
- Department Administrators and OSP will have the ability to Show hidden fields. Click Show to expose the screen template.

- From the Submission Mechanism/Screen Template select Modification Request.

- You will receive the following warning. Click OK.

- This will change your screen to a Modification Request view. Under Link to existing proposal, click Look Up.
• 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.

• Click on record to populate Setup Questions tab with linked proposal. You link proposals to the Master Submission (first submission).

• The proposal number now changes to the next child submission (previously transaction).

• Check Completed box in top Right Corner.

**Internal Uploads & Routing**

• Follow instructions at the top of the page.

• Open the Modification Request (Proposal Documentation) form by clicking Edit.
• Complete all fields related to your modification request. Answering “Is this a Change in Investigator” exposes additional questions and certifications depending on the type of Modification/Prior Approval Request.

• If changes are needed to the Investigator % Credit allocation tab, those will be made at the bottom of this form. For converted SPS records, you will need to add the Investigator % Credit allocation from SPS or update if needed.

• Upload the required attachments on the Modification Request form and then click Lock Form to validate.

• For records converted from SPS, make sure OSP has updated the institution number before routing. The institution number will appear on all routing emails.

• Routing the Modification Request:
  • Route the Modification Request for review and approvals by clicking the thumbs up icon by Submit Pre-Review.

• Click Accepted and then Continue.
• A list of individuals receiving a notification or approval appear in list.

• NOTE: For Change in Investigator, OSP will insert the necessary approvals into the route.

• Click Submit.

• After Modification/Prior Approval Request 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.