

Subaward Overview

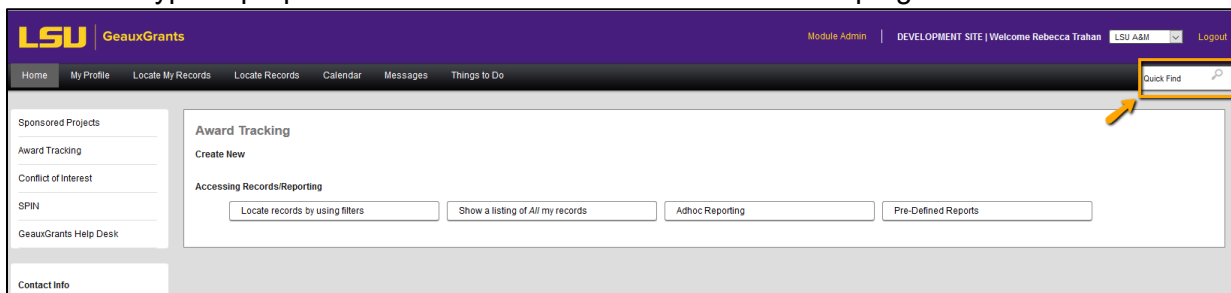
Workday is the official system of record for outgoing Subawards. GeauxGrants is used to capture additional award information, track workflow, store subaward documents, and capture Principal Investigator (PI) approval of subaward terms and conditions.

How to access Proposal Tracking (PT) Record

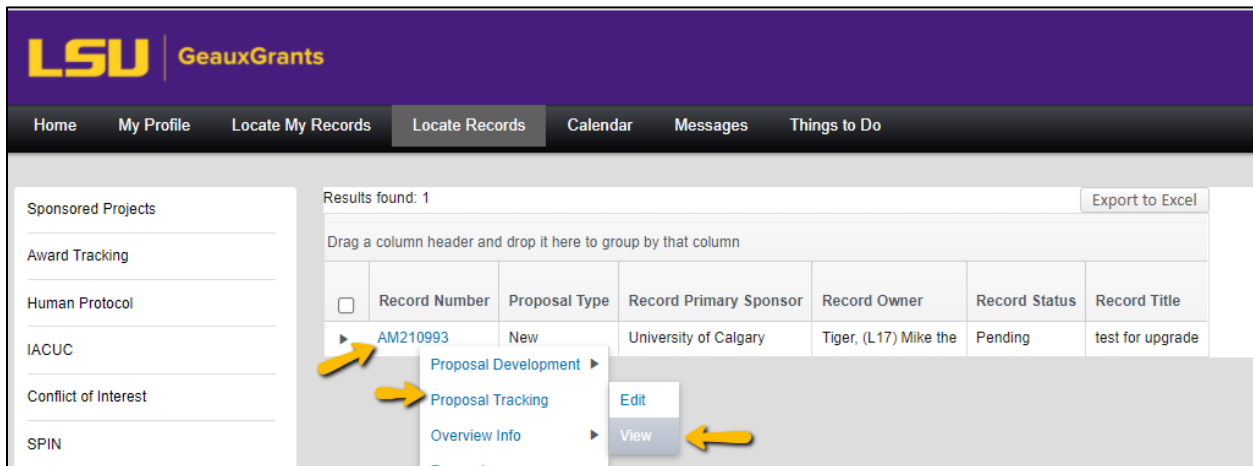
There are two ways to access the Proposal Tracking record.

1) From GeauxGrants Home Screen Using Quick Find

- Type in proposal number in Quick Find search box in top right corner and click Enter.

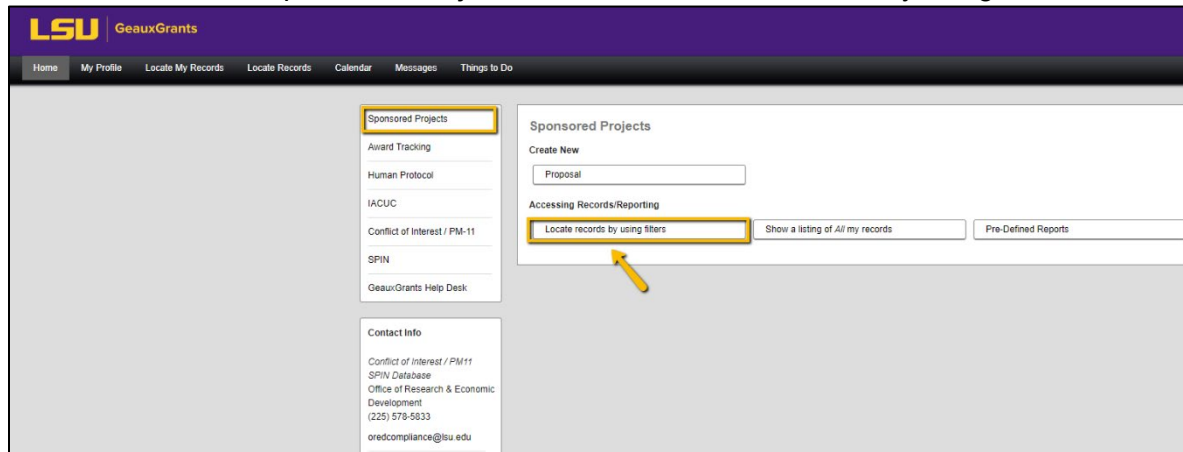


- Click on the record number to bring up menu. Then hover over "Proposal Tracking" and then click "View".



2) From GeauxGrants Sponsored Project tab Using Locate records by using filters.

- From the Sponsored Projects Menu, click Locate records by using filters.



- Select the criteria for your search. You can search by single or multiple options. In the Selected fields option you can click on the grey square to change your search from Exact Match (=), Contains (C), or Wildcards (*?). After entering all criteria, click Search.

A screenshot of the 'Select 'Locate' Criteria' dialog box. At the top right are buttons for 'Save', 'Get', 'Help', and 'Close'. Under 'Modules available for searching across:', 'Award', 'Conflict of Interest / PM-11', 'Human Protocol', and 'IACUC' are unchecked, while 'Sponsored Project' is checked. Below this, there are two columns: 'Available fields to search by' and 'Selected fields'. In the 'Available fields' column, 'Record Number', 'Record Personnel', and 'Record Status' are checked and highlighted with yellow boxes. In the 'Selected fields' column, 'Record Number' is selected with a dropdown menu showing 'C', 'Record Personnel' is selected with a dropdown menu showing '=', and 'Record Status' is selected with a dropdown menu showing 'Submitted'. A yellow arrow points to the 'Search' button on the right.

- Click on the record number to bring up menu. Then hover over "Proposal Tracking" and then click "View".

LSU GeauxGrants

Home My Profile Locate My Records **Locate Records** Calendar Messages Things to Do

Sponsored Projects

Award Tracking

Human Protocol

IACUC

Conflict of Interest

SPIN

Results found: 1 Export to Excel

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Record Number	Proposal Type	Record Primary Sponsor	Record Owner	Record Status	Record Title
<input type="checkbox"/>	AM210993	New	University of Calgary	Tiger, (L17) Mike the	Pending	test for upgrade

Context menu options: Proposal Development, Proposal Tracking, Overview Info, Edit, View

Agreements

- Under the Master Submission record (first record), click on Agreements to see any Subawards for this project.
- You can open the subaward by clicking on “Detail” or by clicking the Subaward in the left tab.
- If you hover over the word Agreement type/number in left tab, it will display the name of the Subrecipient.

Done Save 2024 Upgrade Testing- Sponsor Prior Approval Mod Proposal AM250241
Test (L17) Mike the Tiger (American Psychological Association (APA))

Submissions (2) Agreement Summary (1 Found) You have opened this proposal in view mode

AM250241/New

Summary

Sponsor

Personnel (1)

Budget

Agreements (1)

Subaward/Test Subawar...

Communications (16)

Drag a column header and drop it here to group by that column

Number	Institution	Subaward Number	Type	Status	From	To	Date Signed	
AM250241	Nicholls State University	Test Subaward number	Subaward	PI Review	01-Oct-2024	30-Sep-2026		Detail

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- The Subaward Detail screen will provide you with a summary of the subaward and the subaward status.

DATE	STATUS	RECORDED DATE	RECORDED BY	COMMENTS	DELETE
23-Sep-2024	Process Complete	23-Sep-2024 10:24:21 AM	Samantha Burton Rodosta		
23-Sep-2024	Fully Executed	23-Sep-2024 10:24:18 AM	Samantha Burton Rodosta		
23-Sep-2024	Partially Executed Received	23-Sep-2024 10:24:15 AM	Samantha Burton Rodosta		
23-Sep-2024	Sent to Sub for Signature	23-Sep-2024 10:24:11 AM	Samantha Burton Rodosta		
20-Sep-2024	PI Review Complete	20-Sep-2024 02:18:54 PM	(L17) Mike the Tiger	I approve this subaward as PI L17.	
19-Sep-2024	PI Review	19-Sep-2024 11:31:24 AM	Eric Hale		
16-Sep-2024	Drafting	16-Sep-2024 11:51:17 AM	Tracy Wang	Assigned to Eric Hale	
16-Sep-2024	OSP Assignment	16-Sep-2024 10:44:43 AM	Samantha Burton Rodosta	Gold Team Assignment Needed	
16-Sep-2024	Request Received	16-Sep-2024 10:38:18 AM	Samantha Burton Rodosta	New Agreement	

- **Subaward Agreement Statuses**

- **Request Received** – OSP has received the OSP-3 or OSP-4 form.
- **OSP Assignment** – Subaward/amendment with OSP team lead for assignment to a specialist.
- **Drafting** – Subaward/amendment is being reviewed/drafted by OSP specialist.
- **PI Review** – Draft subaward sent in GeauxGrants for PI review.
- **PI Review Complete** – PI approved draft subaward terms. PI has ability to add comments when approving.
- **Sent to Sub for Signature** – OSP has sent subaward/amendment to subrecipient for review and signature.
- **Unilateral Sent to Sub** – OSP has sent unilateral amendment to subrecipient for review. Only applicable to LBRN and LaSPACE projects.
- **Negotiating** – Subrecipient has requested changes. OSP Specialist is reviewing/negotiating.

- **Partially Executed Received** – Subrecipient has signed subaward and returned to OSP for counter-signature.
 - **Fully Executed** – Subaward has been signed by LSU, and needs to be processed in Workday.
 - **Requisition/Change Order entered in Workday** – OSP has entered subaward/amendment in Workday. Waiting on approvals.
 - **Process Complete** – Fully-executed subaward/amendment sent to subrecipient.
 - **Withdrawn** – Subaward was received by OSP, but PI decided not to issue or the parties could not come to terms.
 - **Closed** – Project and subaward have been closed.
- The bottom of the Summary Detail screen includes additional Agreement Details which will be updated by OSP.
 - The subaward documents, including OSP-3/4 forms and Subaward Agreement/Amendment, can be viewed from the Agreements tab Document Summary. Click the eyeglasses icon in the View Latest column.

NAME	CATEGORY	VIEW LATEST	HISTORY	VERSIONS	LAST UPDATED	DELETE
AM250239 ASU osp 9-1-24.pdf	OSP-3/4			1	16-Sep-2024	
Draft Arizona State Subaward.pdf	Subaward			1	19-Sep-2024	
Pre-assessment form.pdf	Other Documentation			1	16-Sep-2024	

- **Agreement Assignments**

- Shows you who is currently reviewing the subaward, how long they have had it, and the text of the email they received. In the scenario below, the status is PI Review, so it is assigned to our PI, Mike the Tiger.

Assigned Date	Assigned To	Due	Instructions	Open	Remove
15-Oct-2024 11:35:43 AM	Test (L17) Mike the Tiger		AM250239: New subaward or subaward amendment needs your approval		

PI Review and Approval of Subawards

- Once OSP has drafted the subaward, they will attach the draft in GeauxGrants and change the Subaward status to PI Review.

An email will be sent to the PI from GeauxGrants.

- See [Subaward Approvals](#).