Subaward Overview

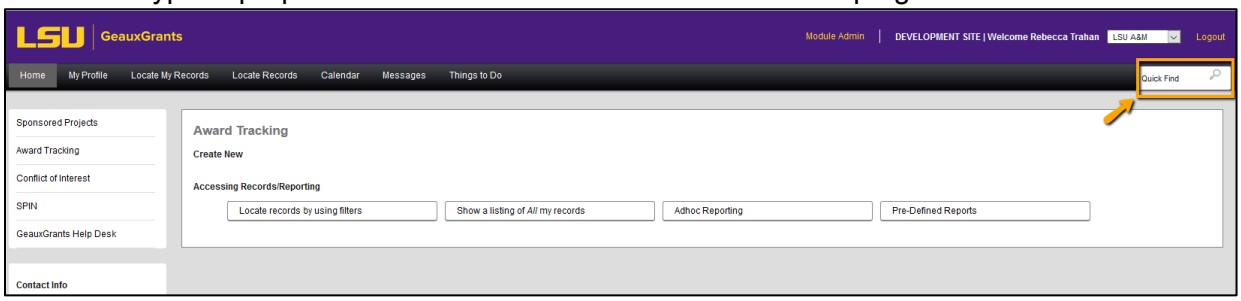
Workday is the official system of record for outgoing Subawards. GeauxGrants is used to capture additional award information, track workflow, store subaward documents, and capture Principal Investigator (PI) approval of subaward terms and conditions.

How to access Proposal Tracking (PT) Record

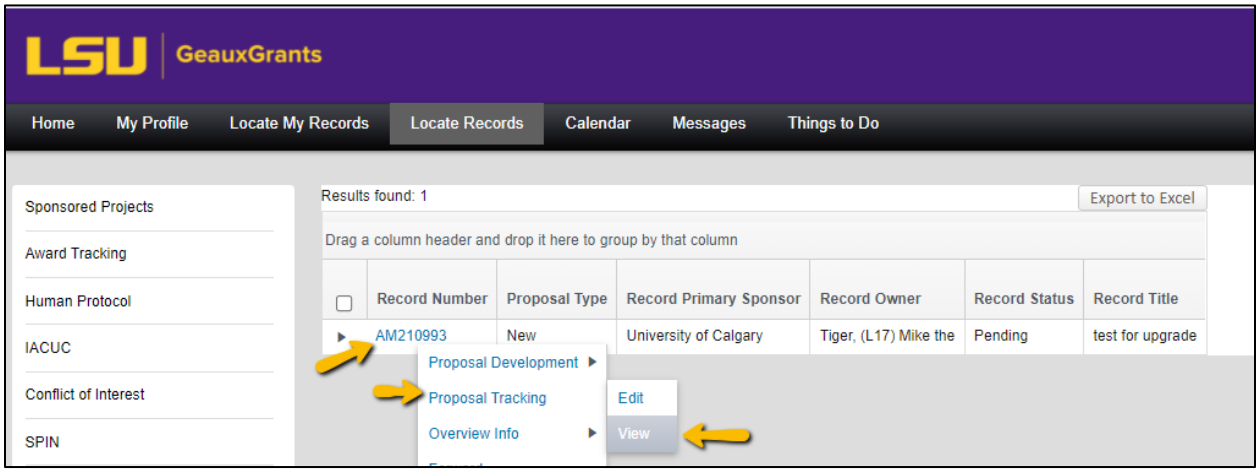
There are two ways to access the Proposal Tracking record.

1) From GeauxGrants Home Screen Using Quick Find

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

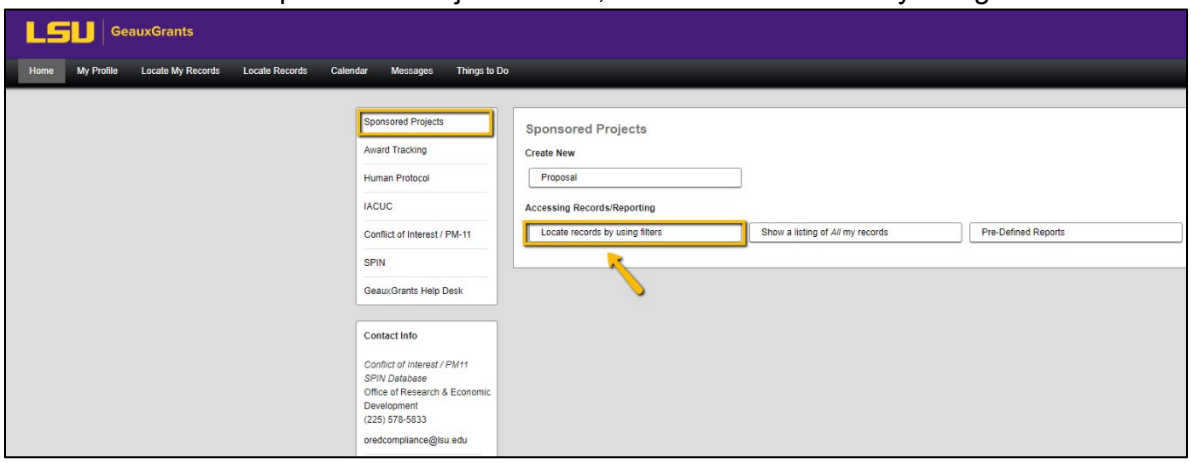


- Click on the record number to bring up menu. Then hover over “Proposal Tracking” and then click “View”.

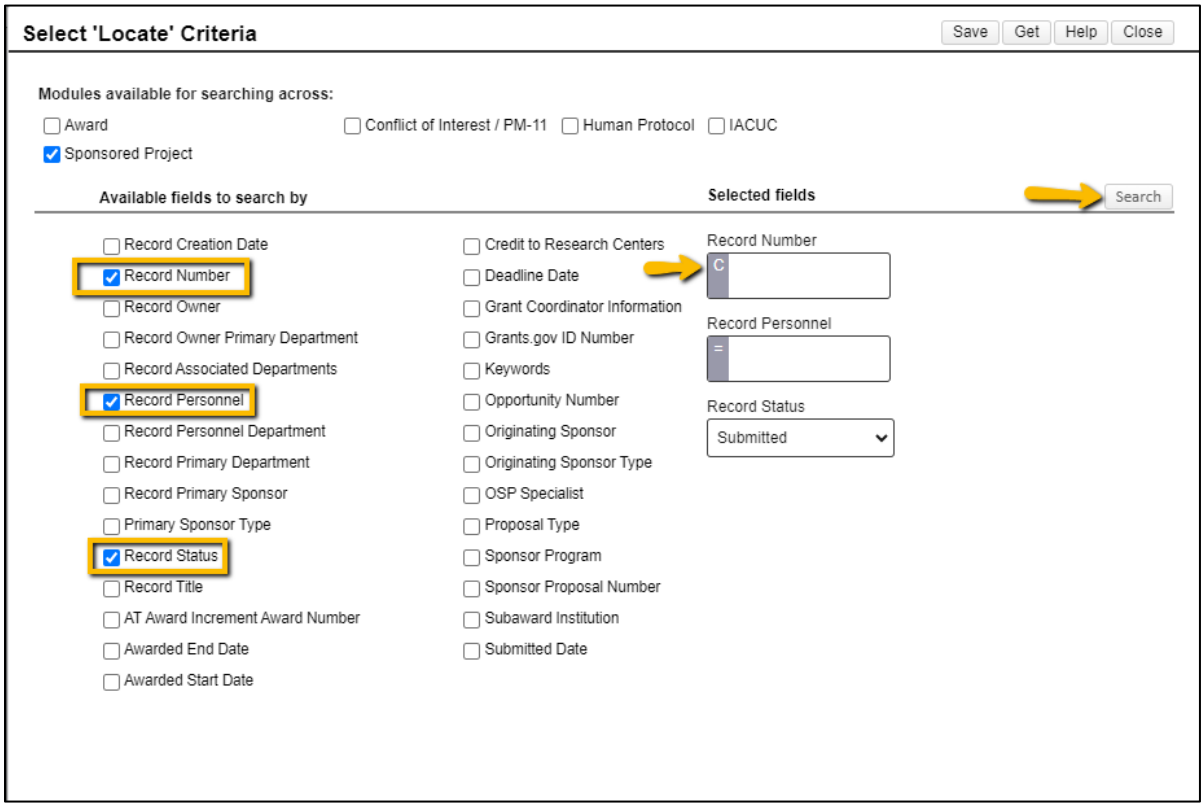


2) From GeauxGrants Sponsored Project tab Using Locate records by using filters.

- 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.



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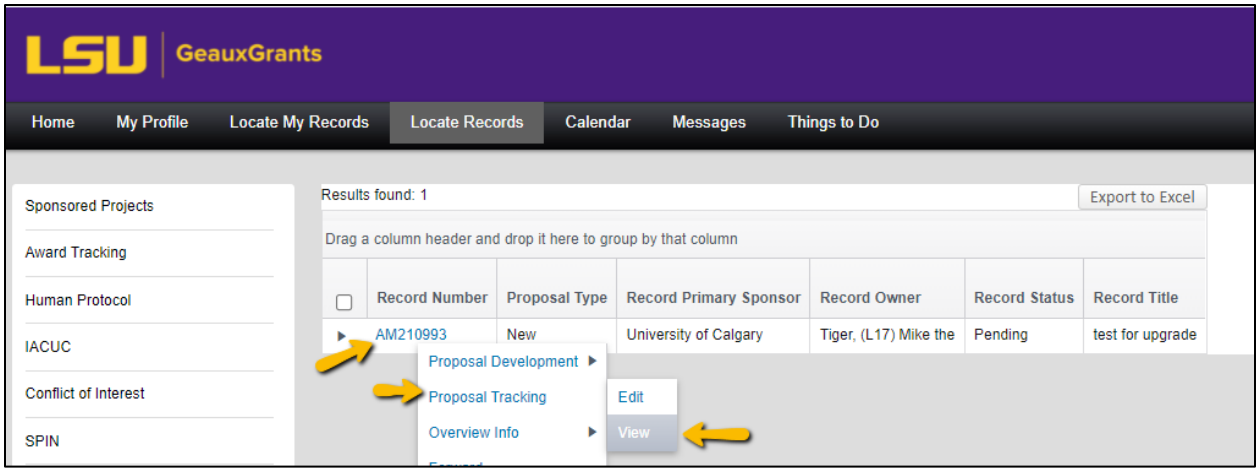
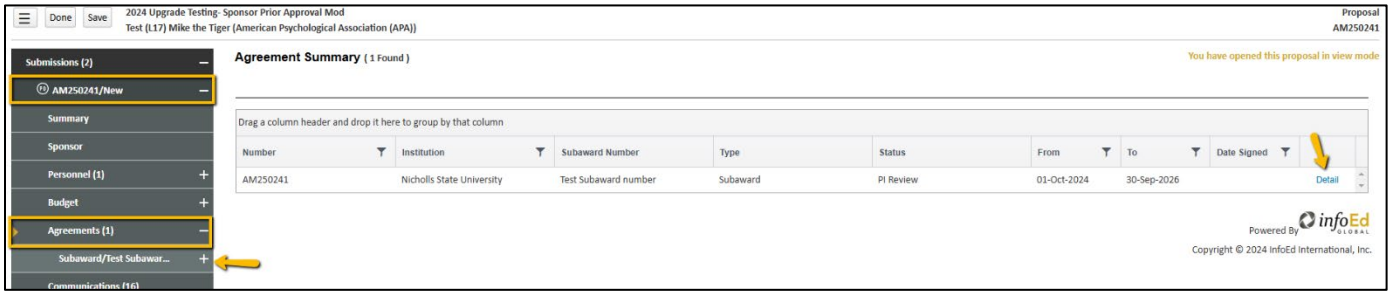
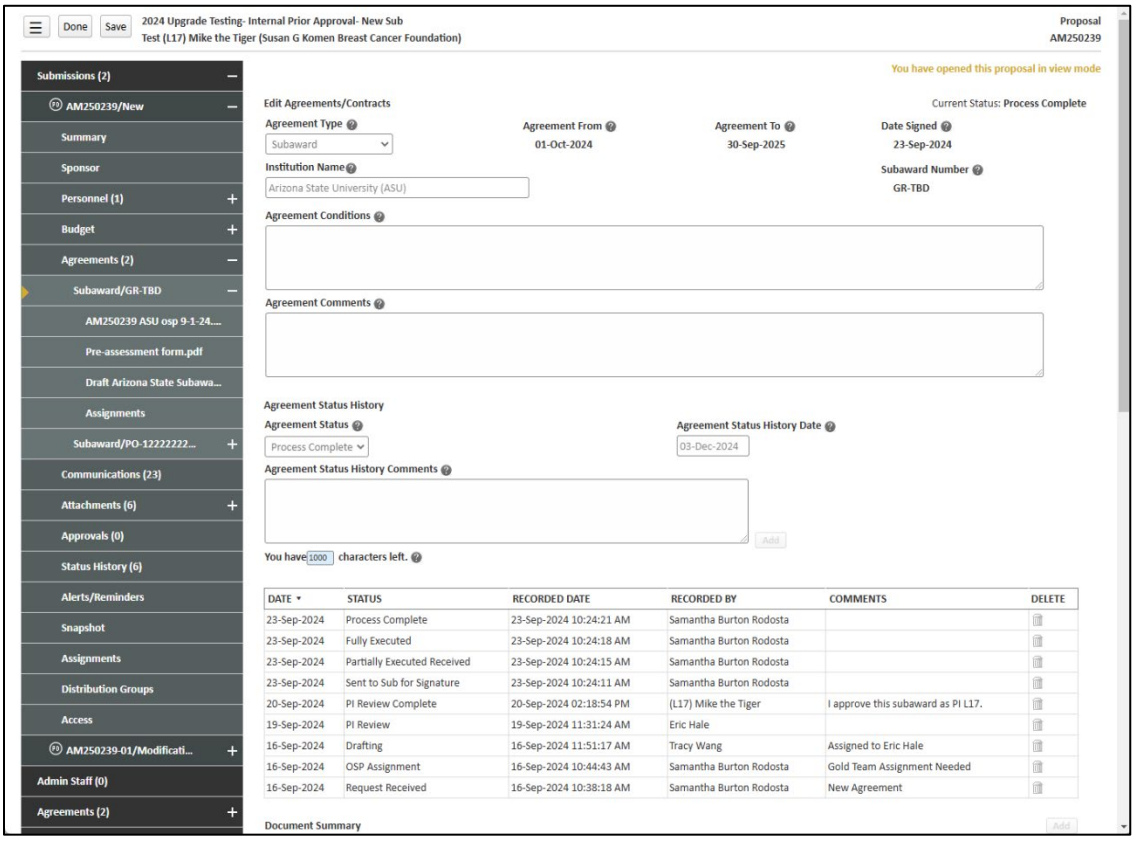


Agreements

- 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.



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



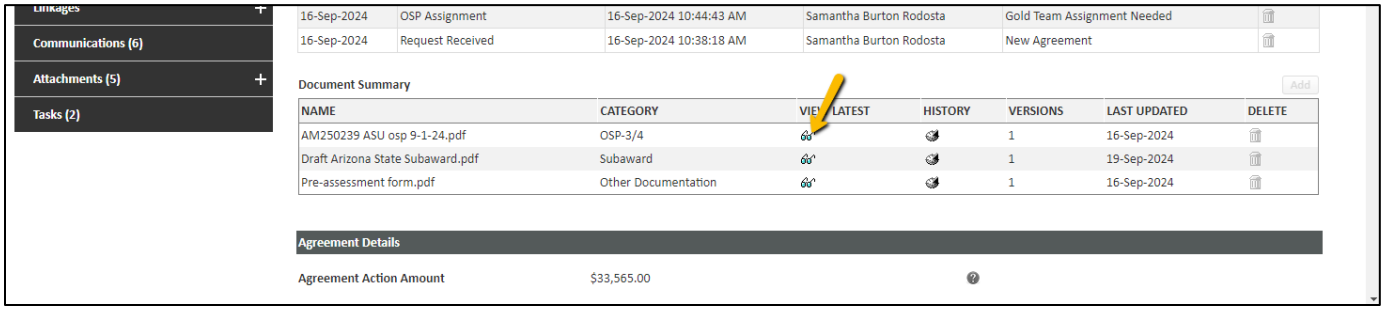
- **Subaward Agreement Statuses**

  - **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.

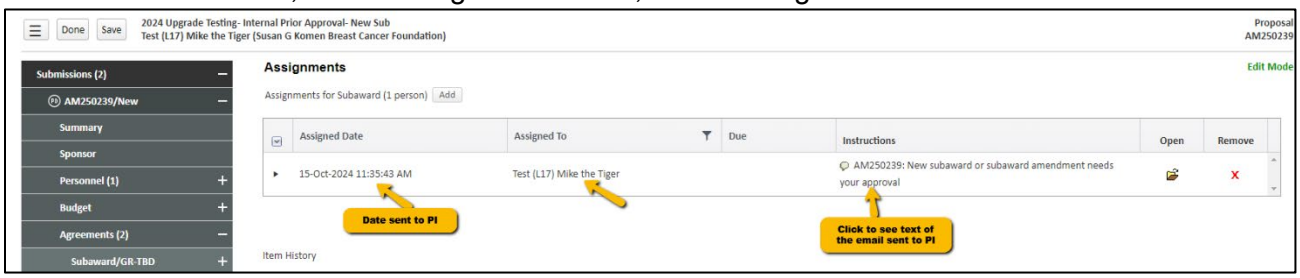
- **Partially Executed Received –** Subrecipient has signed subaward and returned to OSP for counter-signature.
- **Fully Executed –** Subaward has been signed by LSU, and needs to be processed in Workday.
- **Requisition/Change Order entered in Workday** – OSP has entered subaward/amendment in Workday. 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.



- **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.



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.