

# **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.

LSU GeauxGrants	S Module Admin DEVELOPMENT SITE   Welcome Rebecca Trahan LSU AAM 🗸 Logout
Home My Profile Locate My F	Records Locate Records Calendar Messages Things to Do
Sponsored Projects Award Tracking Conflict of Interest	Award Tracking Create New
SPIN	Accessing Records/Reporting           Locate records by using filters         Show a listing of All my records         Adhoc Reporting         Pre-Defined Reports
GeauxGrants Help Desk	

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

LSU GeauxGrants										
Home My Profile Locate M	y Records	Locate Reco	ords Calend	lar Messages Thi	ings to Do					
Sponsored Projects	Results f						Export to Excel			
Award Tracking	Drag a d	olumn header and	lumn header and drop it here to group by that column							
Human Protocol		Record Number	Proposal Type	Record Primary Sponsor	Record Owner	Record Status	Record Title			
IACUC	AM210993 Proposal		New University of Calgary Tiger, (L17) Mike the Pending Development		Pending	test for upgrade				
Conflict of Interest		> Proposal T	racking	Edit						
SPIN		Overview I	Info 🕨	View						

- 2) From GeauxGrants Sponsored Project tab Using Locate records by using filters.
  - From the Sponsored Projects Menu, click Locate records by using filters.

GeauxGrants	
Home My Profile Locate My Records Locate Records Calendar Messages	Things to Do
Sponsored Projects Award Tracking Human Protocol IACUC Conflict of Interest /	Sponsored Projects Create New Proposal Accessing Records/Reporting
SPIN GeauxSrants Heip I	
Contact Info Conflict of Interest / SPIN Database Office of Research Development (225) 575 5633 oredcomptiance@bs	& Economic

• 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.

Select 'Locate' Criteria			Save Get Help Close
Modules available for searching across: Award Conflict of Sponsored Project	Interest / PM-11 🗌 Human Protocol 🏾		
Available fields to search by	5	Selected fields	Search
<ul> <li>Record Creation Date</li> <li>Record Number</li> <li>Record Owner</li> <li>Record Owner Primary Department</li> <li>Record Associated Departments</li> <li>Record Personnel</li> <li>Record Personnel Department</li> <li>Record Primary Department</li> <li>Record Primary Sponsor</li> <li>Primary Sponsor Type</li> <li>Record Status</li> <li>Record Title</li> <li>AT Award Increment Award Number</li> <li>Awarded End Date</li> <li>Awarded Start Date</li> </ul>	Grant Coordinator Information     Grants.gov ID Number     Keywords	Record Number C Record Personnel Record Status Submitted	

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

LSU Get	auxGrants						
Home My Profile	Locate My Records	Locate Rec	ords Calend	dar Messages Th	ings to Do		
Sponsored Projects	Results fo	ound: 1					Export to Excel
Award Tracking	Drag a c	olumn header an	d drop it here to gr	roup by that column			
Human Protocol	D F	Record Number	Proposal Type	Record Primary Sponsor	Record Owner	Record Status	Record Title
IACUC		AM210993	New	University of Calgary	Tiger, (L17) Mike the	Pending	test for upgrade
		Proposal Development					
Conflict of Interest	•		Fracking	Edit			
SPIN		Overview	Info 🕨	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.

	Sponsor Prior Approval Mod ger (American Psychological Association	(APA))							Proposal AM250241
Submissions (2) —	Agreement Summary (1 Fou	und )					You	u have opened this pro	posal in view mode
® AM250241/New —									
Summary	Drag a column header and drop it he	re to group by that column							
Sponsor	Number	Institution	Subaward Number	Туре	Status	From	то 🔻	Date Signed <b>T</b>	1
Personnel (1) +	AM250241	Nicholls State University	Test Subaward number	Subaward	PI Review	01-Oct-2024	30-Sep-2026		Detail 鏱
Budget +									MinfoEd
Agreements (1) —								Powered By	
Subaward/Test Subawar +	<del></del>						Co	opyright © 2024 InfoEd	international, Inc.
Communications (16)									

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

Done Save 2024 Upgrade Testing- In Test (L17) Mike the Tiger		roval- New Sub Breast Cancer Foundation)				Proposal AM250239
Submissions (2) —					You have opened this pr	oposal in view mode
@ AM250239/New —	Edit Agreemen	ts/Contracts			Current Status:	Process Complete
Summary	Agreement Typ Subaward	×	Agreement From @ 01-Oct-2024	Agreement To @ 30-Sep-2025	Date Signed @ 23-Sep-2024	
Sponsor	Institution Nar	ne@			Subaward Number @	
Personnel (1) +	Arizona State	University (ASU)			GR-TBD	
	Agreement Co	nditions @				
Budget +						
Agreements (2) —						
Subaward/GR-TBD —	Agreement Co	mments @				10
AM250239 ASU osp 9-1-24						
Pre-assessment form.pdf						
Draft Arizona State Subawa						10
Assignments	Agreement Sta Agreement Sta			Agreement Status History D	the O	
Subaward/PO-12222222 +	Process Comp	-		03-Dec-2024	are 🕑	
Communications (23)	Agreement Sta	tus History Comments 🛞				
Attachments (6) +						
Approvals (0)				Add		
Status History (6)	You have 1000	characters left. 🚱				
Alerts/Reminders	DATE *	STATUS	RECORDED DATE	RECORDED BY	COMMENTS	DELETE
Snapshot	23-Sep-2024	Process Complete	23-Sep-2024 10:24:21 AM	Samantha Burton Rodosta		(iii
	23-Sep-2024	Fully Executed	23-Sep-2024 10:24:18 AM	Samantha Burton Rodosta		
Assignments	23-Sep-2024	Partially Executed Received	23-Sep-2024 10:24:15 AM	Samantha Burton Rodosta		
Distribution Groups	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.	
Access	19-Sep-2024	PI Review	19-Sep-2024 11:31:24 AM	Eric Hale		1
@ AM250239-01/Modificati +	16-Sep-2024	Drafting	16-Sep-2024 11:51:17 AM	Tracy Wang	Assigned to Eric Hale	1
	16-Sep-2024	OSP Assignment	16-Sep-2024 10:44:43 AM	Samantha Burton Rodosta	Gold Team Assignment Needed	
Admin Staff (0)	16-Sep-2024	Request Received	16-Sep-2024 10:38:18 AM	Samantha Burton Rodosta	New Agreement	(III)
Agreements (2) +	Document Sun	nmary				

- 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.

Linkages 1	16-Sep-2024	OSP Assignment	16-Sep-2024 10:44:43 AM	Samantha Burto	Samantha Burton Rodosta		Gold Team Assignment Needed	
Communications (6)	16-Sep-2024	Request Received	16-Sep-2024 10:38:18 AM	Samantha Burto	Samantha Burton Rodosta		New Agreement	
Attachments (5) +	Document Sum	mary		/				
Tasks (2)	NAME		CATEGORY	VIE LATEST	HISTORY	VERSIONS	LAST UPDATED	DELETE
	AM250239 ASU	osp 9-1-24.pdf	OSP-3/4	6.	٩	1	16-Sep-2024	â
	Draft Arizona St	ate Subaward.pdf	Subaward	661	ک	1	19-Sep-2024	1
	Pre-assessment	form.pdf	Other Documentation	66	3	1	16-Sep-2024	1

### 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.

		rior Approval- New Sub G Komen Breast Cancer Foundation)							roposa 25023
Submissions (2)	_ Ass	signments						Edit	t Mod
@ AM250239/New	- Assig	nments for Subaward (1 person) Add							
Summary		Assigned Date	Assigned To	Ŧ	Due	Instructions	Open	Remove	
Sponsor Personnel (1)	+ •	15-Oct-2024 11:35:43 AM	Test (L17) Mike the Tiger			AM250239: New subaward or subaward amendment needs     your approval	<b></b>	x	*
Budget Agreements (2)	+	Date sent to PI				Click to see text of the email sent to Pl			
Subaward/GR-TBD	+ Item	History							

## 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 <u>Subaward Approvals</u>.