This tip sheet addresses the standard steps for setting up a S2S submission. These instructions assume that the general aspects of the PD (Required Fields for Saving Document, Sponsor & Program Information, Key Personnel, Budget, etc.) have been completed. Check other resources to learn more about these other PD (Proposal Development) prep steps.
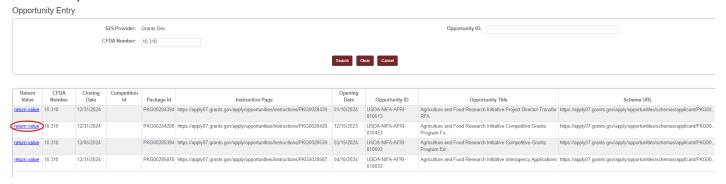
Getting Started:

S2S prep can start at initiation and many items *can* be completed before Initial Review. With all PD prep, it is recommended that a PD is as complete as possible prior to Initial Review. However, the majority of S2S prep is *required* before Workflow routing, as certain incomplete S2S components will generate errors and prevent Workflow routing. The primary exception to this is with attachments, which is discussed later in the Tip Sheet.

IMPORTANT NOTES:

- When adding an attachment, unless otherwise indicated, the attachment should be flattened. To flatten a pdf, print to PDF (Adobe or Microsoft print options) and save that printed copy. This resource from NIH describes how to create or identify a flattened PDF in more detail.
- Attachment file names should be compliant with S2S/Grants.gov requirements which restrict the use of many UTF-8 characters. As an example, do not use a (/) or an (&) in both file names and file descriptions. More info on these characters can be found here.
- Attachment file names have character limits. This is typically 50, but some sponsors limit this more.
- Field entries, such as the title, may be limited to a certain number of characters. The general rule for the title is 200 characters for Grants.gov submissions, but some sponsors may have other character limitations.
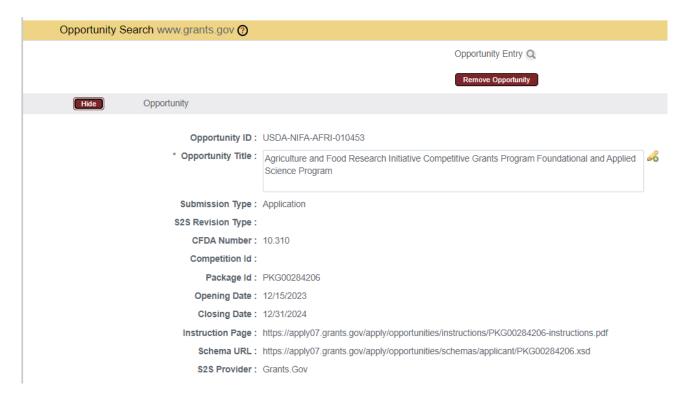
Adding the Opportunity

In the S2S Panel, use the magnifying glass to generate search fields to locate the opportunity. Use either the Opportunity ID or the CFDA Number (also known as the ALN- Assistance Listing Number).

In this case, the CFDA number is entered to conduct this search:

Opportunity Entry

| S2S Provider: | Grants.Gov | | Opportunity ID: | |
| CFDA Number: | 10.310 | | | |

Search Clear Cancel

Return Value	CFDA Number	Closing Date	Competition Id	Package Id	Instruction Page	Opening Date	Opportunity ID	Opportunity Title	Schema URL
return value	10.310	12/31/2024		PKG00284394	https://apply07.grants.gov/apply/opportunities/instructions/PKG0028439...	01/10/2024	USDA-NIFA-AFRI-010613	Agriculture and Food Research Initiative Project Director Transfer RFA	https://apply07.grants.gov/apply/opportunities/schemas/applicant/PKG00...
return value	10.310	12/31/2024		PKG00284206	https://apply07.grants.gov/apply/opportunities/instructions/PKG0028420...	12/15/2023	USDA-NIFA-AFRI-010453	Agriculture and Food Research Initiative Competitive Grants Program Fo...	https://apply07.grants.gov/apply/opportunities/schemas/applicant/PKG00...
return value	10.310	12/05/2024		PKG00285394	https://apply07.grants.gov/apply/opportunities/instructions/PKG0028539...	03/15/2024	USDA-NIFA-AFRI-010693	Agriculture and Food Research Initiative Competitive Grants Program Ed...	https://apply07.grants.gov/apply/opportunities/schemas/applicant/PKG00...
return value	10.310	12/31/2024		PKG00285878	https://apply07.grants.gov/apply/opportunities/instructions/PKG0028587...	04/16/2024	USDA-NIFA-AFRI-010833	Agriculture and Food Research Initiative Interagency Applications	https://apply07.grants.gov/apply/opportunities/schemas/applicant/PKG00...

Select **Return Value** on the opportunity that matches your proposal opportunity.

After selecting Return Value, the Opportunity details will generate.

Opportunity Search www.grants.gov ⓘ

Opportunity Entry 🔍

Remove Opportunity

Hide   Opportunity

Opportunity ID :	USDA-NIFA-AFRI-010453
* Opportunity Title :	Agriculture and Food Research Initiative Competitive Grants Program Foundational and Applied Science Program
Submission Type :	Application
S2S Revision Type :	
CFDA Number :	10.310
Competition Id :	
Package Id :	PKG00284206
Opening Date :	12/15/2023
Closing Date :	12/31/2024
Instruction Page :	https://apply07.grants.gov/apply/opportunities/instructions/PKG00284206-instructions.pdf
Schema URL :	https://apply07.grants.gov/apply/opportunities/schemas/applicant/PKG00284206.xsd
S2S Provider :	Grants.Gov

In Forms, you can preview the Grants.gov forms that will be used to collect the proposal entries and attachments throughout this PD.

Hide   Forms

Form Name	Mandatory	Include	Type
SF424 (R & R) V5.0	Yes	Yes	Autogenerated
AFRI_Project_Type_2_0	Yes	Yes	User Attachable
NIFA Supplemental Information V1.2	Yes	Yes	Autogenerated
Project/Performance Site Location(s) V4.0	Yes	Yes	Autogenerated
Research & Related Budget V3.0	Yes	Yes	Autogenerated
Research & Related Personal Data V1.2	Yes	Yes	Webform
Research And Related Other Project Information V1.4	Yes	Yes	Autogenerated
Research and Related Senior/Key Person Profile (Expanded) V4.0	Yes	Yes	Autogenerated
R & R Subaward Budget Attachment(s) Form 5 YR 30 ATT V3.0	No	☐	Autogenerated

Show   User Attached Forms

HELP EMAIL: streamlyne@iastate.edu   **WEBSITE:** https://www.ospa.iastate.edu/streamlyne   **UPDATED:** 09/2024

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There are **three (3) Form "Types"** within this Opportunity. Other opportunities may not include all three types.

User Attachable: Requires a download from the document found in this section (click on the Form Name and save to your computer). Initiator or PI will complete the form and upload back into the User Attached Forms section in its original state (keep as a fillable form if that is how it is generated).

Webform: Data is pulled directly from the entries (which may or may not include attachments) in the Webforms Panel of the PD.

Autogenerated: Collected from field entries or attachment locations throughout the PD.

Click on any Form Name within this list, if you want to preview what they are designed to collect- to help ensure that you have the correct info needed to complete this PD thoroughly.

This resource will take you through examples of how to complete each type of form by navigating you through several parts of a PD. Please be aware, each opportunity is unique and will not have the exact matching forms or expectations. Always refer to your FOA for specific instructions- which will supersede these common tips.

User Attached:
User Attached forms are found in the S2S section of the PD, and unlike other forms, are intended to be downloaded from that location and completed.

As an example, the USDA-NIFA-AFRI package includes the **AFRI_Project_Type_2_0** form.

Form Name	Mandatory	Include	Type
SF424 (R & R) V5.0	Yes	Yes	Autogenerated
AFRI_Project_Type_2_0	Yes	Yes	User Attached

Clicking on this form will open a fillable form.
1. Complete it as-is when it opens, or if necessary, save it to an alternate location. This document should remain fillable and should <u>not be saved as a flattened document</u>.
2. Once complete, with answers specific to your PD project, save again and upload it under User Attached Forms.
3. Select Show
4. Choose File
5. *If a description is needed*, add that without special characters, and in the allowed character limit.
6. Select Add.

	Description	Namespace	Form Name	Form File Name	Actions
Add:				Choose File No file chosen	Add

Webform:

Webforms are found in the lower part of the tabs- in the left menu of a PD:

Webforms

In this section, the required forms will be shown. In this case, only one Webform is required to be completed.

return to proposal

RR_PersonalData_1_2-V1.2

Mark all forms: Select ∨ Update

Because this form can be synced from existing entries, it is important to have as much of the standard proposal data entered already into this PD (for example, in Key Personnel). **If you have not entered basic data, stop and go back to finalize proposal data throughout the PD.**

1. Start by selecting Sync to pull in the institutional data/user entered data.

Sync

RR_PersonalData_1_2-V1.2 (Complete) ✔

2. Select Yes when asked if you would like to proceed.

This action will update all mapped fields (highlighted in yellow on this form) with your current Proposal data. Do you wish to proceed?
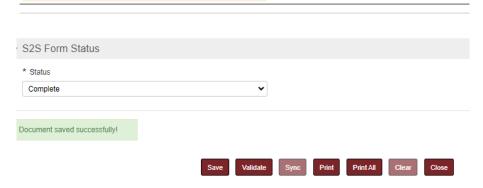
Yes No

3. After this sync, fill in any other data relevant to this project within that Webform
   NOTE: Some webforms may contain prompts to add attachments, Check the FOA carefully to determine if this is the location where certain attachments are expected and/or upload test attachments to this area to confirm whether they are pulled into the submission. This is an uncommon location for attachments, and it possible that this is not the location for supporting documents. (See the *Attachments in an Autogenerated Form* section, later in this Tip Sheet, for more info on determining the correct location for attachments).
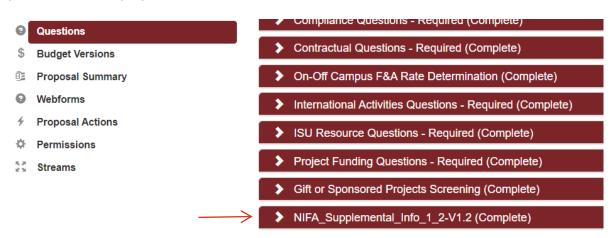
* 15. Descriptive Title of Applicant's Project:

Attach supporting documents as specified in agency instructions.

[Add Attachments] [Delete Attachments] [View Attachments]

4. Change the Status to Complete
5. Validate to check that data is entered and select Save.

S2S Form Status

* Status

Complete

Document saved successfully!

[Save] [Validate] [Sync] [Print] [Print All] [Clear] [Close]

Autogenerated:

Autogenerated form types collect a wide variety of data and attachments from various areas throughout the PD. This includes standard institutional information, Program Information, and also entries specific to the project.

One example, in a NIFA AFRI proposal, occurs in the Questions tab.

- ❓ Questions
- 💲 Budget Versions
- 🗐 Proposal Summary
- ❓ Webforms
- ⚡ Proposal Actions
- ⚙ Permissions
- ⛶ Streams

- ❯ Compliance Questions - Required (Complete)
- ❯ Contractual Questions - Required (Complete)
- ❯ On-Off Campus F&A Rate Determination (Complete)
- ❯ International Activities Questions - Required (Complete)
- ❯ ISU Resource Questions - Required (Complete)
- ❯ Project Funding Questions - Required (Complete)
- ❯ Gift or Sponsored Projects Screening (Complete)
- ❯ NIFA_Supplemental_Info_1_2-V1.2 (Complete)

The **NIFA_Supplemental_Info_1_2-V1.2** requests answers to questions like these:

Does the legal applicant have an active Automated Standard Application for Payments (ASAP) Recipient Identification Number for NIFA awards?	
Yes	

What is the ASAP Recipient ID (which corresponds with this applications's DUNS and EIN) to be used in the event of an award?	
1990068	

What is the Program Code Name you are applying to?	
Animal Breeding, Genetics, and Genomics	

What is the Program Code you are applying to?	
A1201	

These, and other answers in this section, are then automatically generated into this form:

NIFA Supplemental Information V1.2

And produce the following information in the form for submission:

2. Program to which you are applying

Program Code Name
Animal Breeding, Genetics and Genomics

Program Code
A1201

3. Type of Applicant

H: Public/State Controlled Institution of Higher Education

6. ASAP Recipient Information

Does the legal applicant have an active Automated Standard Application for Payments (ASAP) Recipient Identification Number for NIFA awards?

☑ Yes   ☐ No

What is the ASAP Recipient ID (which corresponds with this application's DUNS and EIN) to be used in the event of an award?

1990068

Attachments in an Autogenerated Form

Attachments are commonly pulled into their associated Autogenerated form from the Attachments section. As mentioned previously, most S2S items need to be prepared prior to Workflow Routing, or errors will be generated. Attachments are often the exception. Most attachments do not need to be added prior to Workflow routing and can be added once these are finalized but before submission.

One known exception is the budget justification in some S2S proposals. In order to consider the budget complete, Streamlyne will look for the budget justification attachment. USDA NIFA is one example where this has occurred.

One example of an Attachments form is the **Research and Related Other Project Information V1.4**, found in the NIFA AFRI proposal package. **Open up this form** by hovering over it on the left side of the Forms in the S2S panel (under Form Name). When underlined, click on it to view.

Research & Related Personal Data V1.2
Research And Related Other Project Information V1.4
Research and Related Senior/Key Pers   RR_OtherProjectInfo_1_4
R & R Subaward Budget Attachment(s) Form 5 YR 30 ATT V3.0

Once this form is open, you can see that the following attachments are intended to be collected into this form. NOTE: Even though Add Attachment is an option when previewing this form, <u>do not add attachment directly into this form</u>. Let Streamlyne collect this attachment elsewhere, as it is designed to do.

7. Project Summary/Abstract		Add Attachment	Delete Attachment	View Attachment
8. Project Narrative		Add Attachment	Delete Attachment	View Attachment
9. Bibliography & References Cited		Add Attachment	Delete Attachment	View Attachment
10. Facilities & Other Resources		Add Attachment	Delete Attachment	View Attachment
11. Equipment		Add Attachment	Delete Attachment	View Attachment
12. Other Attachments	Add Attachments	Delete Attachments	View Attachments	

In this case, the attachments that will be added here by Streamlyne are found in the Abstracts & Attachments panel, in Proposal Attachments.

They *do not always*, but commonly mirror the names found in this form. Therefore, below are examples of how you will locate the associated attachments.

7. Project Summary/Abstract (listed above) is labeled as Project Summary as the Attachment Type in Proposal Attachments.

Hide	11. Project Summary: ProjectSummary_3358.pdf - Complete

Attachment Type :	Project Summary	File Name :	ProjectSummary_3358.pdf
* Status :	Complete	Contact Name :	

8. Project Narrative (listed above) is labeled as Narrative as the Attachment Type in Proposal Attachments.

Hide	13. Narrative: ProjectNarrative.pdf - Complete

Attachment Type :	Narrative	File Name :	ProjectNarrative.pdf
* Status :	Complete	Contact Name :	

When all associated attachments are located and added, and the form is printed*, you will see them in the associated areas of the printed form, and the documents will follow that form in the print preview.

Research & Related Personal Data V1.2	Yes	Yes	Webform	☐
Research And Related Other Project Information V1.4	Yes	Yes	Autogenerated	☑
Research and Related Senior/Key Person Profile (Expanded) V4.0	Yes	Yes	Autogenerated	☐
R & R Subaward Budget Attachment(s) Form 5 YR 30 ATT V3.0	No	☐	Autogenerated	
				Print Selected

Later, in the R&R Senior/Key Person Profile webform, these attachments are pulled in:

*Attach Biographical Sketch	BiographicalSketch_McGill_3139.pdf
Attach Current & Pending Support	CurrentPendingSupport_McGill_3139.pdf

An alternative example of Attachment collection can be found in a Nuclear Regulatory Commission (NRC) proposal. This proposal uses only the **Attachments V1.2** Form to collect required proposal attachments.

Application for Federal Assistance (SF-424) V4.0

Budget Information for Non-Construction Programs (SF-424A) V1.0

Grants.gov Lobbying Form V1.1

Attachments V1.2

Disclosure of Lobbying Activities (SF-LLL) V2.0

When hovering over and clicking on that form to open it, you see that this opportunity looks for all attachments as Attachment 1, Attachment 2, etc.

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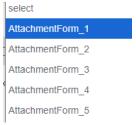IOWA STATE UNIVERSITY
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ATTACHMENTS FORM

Instructions: On this form, you will attach the various files that make up your grant application. Please consult with the appropriate Agency Guidelines for more information about each needed file. Please remember that any files you attach must be in the document format and named as specified in the Guidelines.

Important: Please attach your files in the proper sequence. See the appropriate Agency Guidelines for details.

1) Please attach Attachment 1		Add Attachment	Delete Attachment	View Attachment
2) Please attach Attachment 2		Add Attachment	Delete Attachment	View Attachment
3) Please attach Attachment 3		Add Attachment	Delete Attachment	View Attachment
4) Please attach Attachment 4		Add Attachment	Delete Attachment	View Attachment

To locate the associated attachments to be collected by this form, go to Abstracts & Attachments, Proposal Attachments, Add Proposal Attachments, Attachment Type. The Attachment Type found that is associated with this form are these:

select
AttachmentForm_1
AttachmentForm_2
AttachmentForm_3
AttachmentForm_4
AttachmentForm_5

Unlike the NIFA proposal attachments, which have very prescriptive labels, this opportunity only uses these Attachment Types. The number chosen will associate with the order these attachments are generated into the proposal.
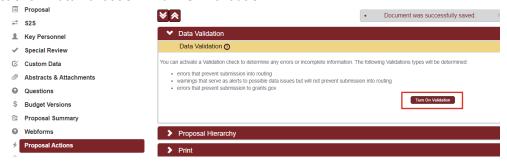
Workflow Routing & S2S Submission
Once all of these S2S elements are complete (with the noted exception of some attachments) and this PD is free of errors, this PD can be routed into Workflow.
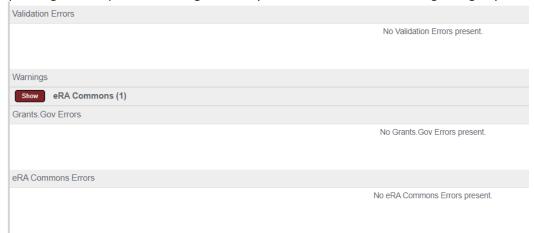
To ensure this is ready for Workflow routing, run a Validation check.
Go to: Proposal Actions > Data Validation > Turn On Validation

- Proposal
- S2S
- Key Personnel
- Special Review
- Custom Data
- Abstracts & Attachments
- Questions
- Budget Versions
- Proposal Summary
- Webforms
- **Proposal Actions**

Document was successfully saved.

Data Validation

Data Validation ⓘ

You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov

Turn On Validation

Proposal Hierarchy

Print

If Validation Errors are generated, these will need to be resolved *prior* to Workflow routing. Warnings may not need to be addressed, depending on the specific Warning. You may need to check with OSPA regarding any Warning generated.

Validation Errors	
	No Validation Errors present.
Warnings	
Show eRA Commons (1)	
Grants.Gov Errors	
	No Grants.Gov Errors present.
eRA Commons Errors	
	No eRA Commons Errors present.

To help identify or address any S2S Errors or Warnings prior to Workflow Routing, it may be helpful to review OSPA's Hints for S2S Submission page, which catalogues several known issues and solutions in Streamlyne S2S.

Once an S2S PD reaches OSPA, the approval and submission occur in 2 stages. OSPA will check standard Final Review items, which include S2S webforms and Questions. Final technical documents are not all required at this stage. OSPA will give authorization for the PI and the Initiator/Aggregator(s) to finalize the full S2S package.

Once the PI and Initiator/Aggregator believes the PD is final and ready for submission, it is strongly recommended that full package is printed, to preview which entries and attachments will be transmitted to Grants.gov. This is done in the S2S tab, Forms Subpanel > Select to Print: **All Included** (as shown below with a NIFA submission).

Form Name	Mandatory	Include	Type	Select to Print: (All Included | None)
SF424 (R & R) V5.0	Yes	Yes	Autogenerated	☑
NIFA Supplemental Information V1.2	Yes	Yes	Autogenerated	☑
Key Contacts V2.0	Yes	Yes	Autogenerated	☑
Project/Performance Site Location(s) V4.0	Yes	Yes	Autogenerated	☑
Project Abstract V1.2	Yes	Yes	Autogenerated	☑
Attachments V1.2	No	☐	Autogenerated	☐
				Print Selected