

STREAMLYNE TIP SHEET PD FOR FINAL REVIEW

TIPS FOR FIELD ENTRIES AND ATTACHMENTS PRIOR TO OSPA FINAL REVIEW

After a PD has been approved at the Initial Review (IR) stage, the remaining field entries and attachment uploads will need to be completed prior to workflow routing and final approval. See the *PD for Initial Review* Tip Sheet to review what was completed at that stage. As mentioned in that Tip Sheet, the entries and uploads outlined in this tip sheet *can* be completed at the IR stage, to allow for a more comprehensive IR. Items missed or entered incorrectly at Final Review stage require corrections, and may require a new round of Workflow routing.

The following information outlines the field entries as the PD is prepared for Final Review. An [X] indicates that a field is mandatory. An [*] indicates that there are conditions to whether a field needs to be filled in. The entries are organized by tabs and panels of the PD in Streamlyne.

SECTION (tab) Panel or Sub-Panel entry	Final	S2S	Notes
PROPOSAL			
Sponsor and Program Information: Sponsor Deadline Type	X		
Internal Deadline Date	*		Only use if a deadline date is requested prior to the sponsor deadline date. This is only used when a PI or Key Person has a circumstance requiring early submission, AND the PD has been routed 8 days <i>prior</i> to this Internal Deadline.
Sponsor Name	X		
Prime Sponsor Name	X		
Research Type	*		If activity type is Research/ NA if Other.
NSF Science Code	*		If activity type is Research/ NA if Other.
NSF Division Code	*		Only needed if NSF proposal.
Does the Proposal Include Subrecipients	*		If applies.
Notice of Opportunity	X	X	Select Type of Notice.
Opportunity ID	*	X	Not applicable when not S2S - will populate when linked.
Opportunity Title	*	X	Not applicable when not S2S - will populate when linked.
CFDA Number	*	X	If applies, and if found in FOA.
CFDA Title	*	X	If applies, and if found in FOA.
Prev. Grants.gov Tracking ID	*		If applies- generally only needed if resubmission or corrected.
Agency Routing Identifier	*		If applies- generally only needed if resubmission or corrected.
Sponsor Award ID	*		If applicable.
Organizations, Performance Sites & Collaborators: Applicant Organization	X		
Performing Organization	X		DO NOT CHANGE.
Performance Site Locations		X	Only required if additional location to be added, when S2S
Collaborators	*	*	Required if subs are involved. Check the box next to this entry if collab to be included as a performance site.

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SECTION (Tab) Panel or Sub-Panel field entry	Final	S2S	Notes
Delivery Info: Submitted By	X		If indicating a system outside of Streamlyne and OSPA submits, OSPA's access to this system is required at the time of Final Review.
Delivery Comments	*		Optional; if needed to clarify process of submission.
Delivery Type	X		
Keywords: Description	*		List country: mandatory for foreign country involvement.

Document Template: Current Template In Use & Change Template	NA		Do not use.
S2S			
Opportunity/ Submission Details/ Forms		X	If S2S, enter and complete according to sponsor guidance. See the S2S Tip Sheet for more specific help.
KEY PERSONNEL			
Key Personnel	X		Initiator adds all Key Persons here.
Proposal Certification	X		Completed by Key Persons at time of workflow approval.
Combined Credit Split	X		Select the appropriate percentage splits, must equal 100%
RU F&A Distribution	X		Generated from the Costing Allocation table specific to Key Persons on PD. Cannot be changed.
SPECIAL REVIEW			
Special Review: Type IACUC or IRB	*	*	If applies to project and if S2S submission.
CUSTOM DATA			
Campus Entered Data: Center Director Incentive (Y/N)	*		Optional- depends on Center Director preference.
Performance Site - Off Campus Perf. Site	*/X		Must select one or the other of these, or both if applicable.
Performance Site - Primary ISU Site	*/X		Must select one or the other of these, or both if applicable.
Worktag/Account# - Current	*		Optional, typically applies for supplement or continuation.
Worktag/Account# - Previous	*		Optional, typically applies for supplement or continuation.
QUESTIONS			
Grants.gov S2S Questionnaire		X	Required if S2S.
Research Categories	*		Required if Research is indicated as Activity Type. One or more categories are required.
Proposal Questions	X		
Compliance Questions	X		
Contractual Questions	X		
On-Off Campus F&A Rate Determination	NA		Not Required- resource only.
International Activities Questions	X		

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ISU Resource Questions	X		
Project Funding Questions	X		
Gift or Sponsored Projects Screening	NA		Not Required- resource only.
PHS398_CoverPageSupplement_5_0-V5.0		X	Required if S2S/ NIH only.
NIFA_Supplemental_Info_1_2-V1.2		X	Required if S2S/ USDA NIFA only.
BUDGET VERSIONS			Subrecipient budget detail required at FINAL. Must match amount indicated at IR. If S2S, utilize <i>Adding a sub budget with budget justification in SL Tip Sheet</i> for more info. Follow general budget guidance when entering sub amounts in Non-S2S proposal. Mark full budget as Complete and Final.
PROPOSAL SUMMARY			View proposal details. PIs can go to this section to select Proposal Person Certification (also in Key Personnel).
WEBFORMS		X	Only applies to S2S, check S2S Tip Sheet for more info.
PROPOSAL ACTIONS			
Data Validation		X	Turn on Validation and resolve necessary validation errors prior to routing. Turn off Validation after generating results.
Route for Approvals		X	Button at the bottom the page when in Proposal Actions. Select to route into “Workflow” when PD is finalized.
PERMISSIONS			View assigned roles, or add users.
STREAMS			No data entry.

When routing for FINAL REVIEW, OSPA will look for the following uploaded documents to finalize the review. *Naming Suggestion does not override the sponsor’s specific naming guidance.*

Document	Attachment Type	Description	File Name: Naming Suggestion	Where to upload
Narrative	Narrative	Narrative or Project Description	Narrative or Project Description	Internal Attachments unless required to be pulled into S2S- then use Proposal Attachments
Subaward budget (Non S2S)	Subrecipient Documentation	Sub Name budget	(Sub Name, abbreviated) Budget – e.g. <i>K State Budget</i>	Internal Attachments

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Document	Attachment Type	Description	File Name: Naming Suggestion	Where to upload
Subaward budget justification (Non-S2S)	Subrecipient Documentation	Sub Name budget just	Sub Name, abbreviated) Budget – e.g. <i>K State Budget Just</i>	Internal Attachments
Subaward budget (S2S)	(form name) depends on the specific budget form required. Example: RR_Budget_3_0_A30-V3.0	Sub Name budget	(Sub Name, abbreviated) with form name – e.g. <i>K State RR_Budget_3_0_A30-V3.0</i>	Uploaded into Budget Versions (select/open budget) -> Budget Actions -> Subaward Budget
Subaward budget justification (S2S)	NA, included in budget upload. Not an individual upload in Streamlyne when using R&R sub budget	Sub Name budget just	(Sub Name, abbreviated) Budget Just– e.g. <i>K State Budget Just</i>	Uploaded as attachment within S2S subaward budget attachment. <i>MUST BE FLAT PDF</i>
Subaward SOW	Subrecipient Documentation	Sub Name SOW	(Sub Name, abbreviated) SOW – e.g. <i>K State SOW</i>	Internal Attachments
Subaward Transmittal Letter	Subrecipient Documentation	Sub name Trans letter	(Sub Name, abbreviated) trans letter – e.g. <i>K State trans letter</i>	Internal Attachments
Other attachments needed for S2S submission	Varies. Check that “Attachment type” aligns with Attachment Form(s) found in the S2S section, and check that the attachment type selected pulls the document into the S2S/ forms/ printed forms.	Varies: use if description field helps identify this document more thoroughly, but leave blank if file name accurately identifies the file. Do not use symbols, slashes, etc.	Name according to FOA instructions, or to identify document accurately. DO NOT USE Non utf-8 characters, such as an ampersand (&) or slash (/) in the file name.	Proposal Attachments <i>MUST BE FLAT PDF unless indicated otherwise by sponsor.</i>
Personnel documents	Varies. Select the Attachment type that pertains to the required personnel docs e.g. Biosketch/CV or COI	Description is not required. May include if helpful to differentiate.	Key Person Name Biosketch, COA etc. (do not use symbols, slashes, etc. in the file name)	Personnel Attachments <i>MUST BE FLAT PDF unless indicated otherwise by sponsor</i>

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Paragraph 1 body copy

Title 1

Paragraph 2 body copy and bullet points

Title 2

Paragraph 2 body copy and bullet points

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