

STREAMLYNE TIP SHEET PD FOR INITIAL REVIEW

TIPS FOR FIELD ENTRIES AND ATTACHMENTS PRIOR TO INITIAL REVIEW

INITIAL REVIEW FIELD ENTRY REQUIREMENTS

To start a PD and route for the Initial Review, limited field entries are *required*. The fields under Required Fields for Saving Document, as shown below, must be completed.

The screenshot shows the 'Required Fields for Saving Document' panel in the Streamlyne system. The panel includes a header with a dropdown arrow and an information icon. Below the header is a text box explaining that all fields in this panel are required for saving the proposal and obtaining a Proposal Number. A yellow bar highlights the 'Required Fields for Saving Document' section. The form contains the following fields:

- Proposal Number: 34
- * Sponsor Code: 001044 (NIH-NATIONAL INSTITUTES OF HEALTH)
- * Proposal Type: New
- * Project Start Date: 09/01/2023
- * Lead Unit ID: CALS/AES-BBMB - BIOCHEMISTRY, BIOPHYSICS AND MOLECULAR BIOLOGY - CALS/AES
- * Project End Date: 08/31/2025
- * Activity Type: Research
- * Submission Type: Application
- * Sponsor Deadline Date: 07/28/2023
- * Sponsor Deadline Time: 5:00 PM
- * Project Title: Test Title

IMPORTANT NOTE: The Lead Unit ID cannot be changed once this entry is saved. If entered incorrectly, you will need to start a new proposal. The Lead Unit ID must include both the Reporting Unit and the Lead Unit.

In this example below, it is necessary to **select DSO-DSO** (the fourth option). The first option is not a full Lead Unit.

- DSO - DEAN OF STUDENTS
- DSO-ASC - ACADEMIC SUCCESS CENTER - DSO
- DSO-CENTR - CENTER FOR LGBTQIA+ STUDENT SUCCESS - DSO
- DSO-DSO - DEAN OF STUDENTS OFFICE - DSO

At this time, OSPA and ISUF also need to identify who needs to review this PD. Enter the ***Anticipated Award Type** in the **Sponsor & Program Information** sub-panel. Specifically, be sure to identify whether or not it will be a 501(C) (3) Sponsored Project or an ISUF Gift. This entry can be changed at a later time.

The screenshot shows the 'Sponsor & Program Information' panel. The panel includes a header with an information icon. Below the header is a text box explaining that all fields in this panel are required for saving the proposal. The form contains the following fields:

- * Anticipated Award Type: Grant
- Sponsor Award ID: [Empty]

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SUBRECIPIENTS:

All subrecipients need to be identified at the time of Initial Review. This allows OSPA to check for Conflict of Interest (COI) and other relevant compliance information early in our review process.

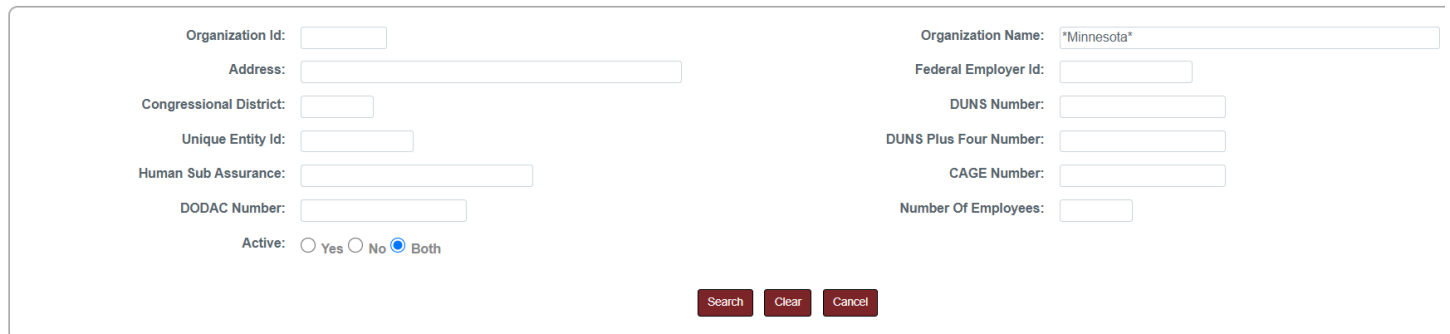
To add a subrecipient:

1. Go to the Proposal tab, and the Organizations, Performance Sites & Collaborators panel.
2. In the Collaborators Sub-panel, search for the sub by selecting the magnifying glass.



3. Search by a known field, such as Organization Name. Use a full name, or a partial name with the wildcards (* %) at each end of the entry to generate a range of results within Streamlyne.

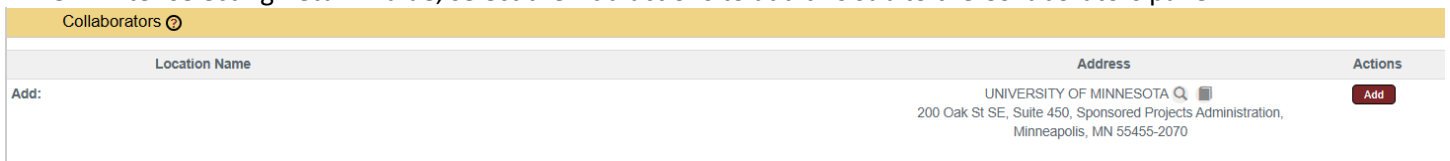
Organization Lookup



4. Select Return Value when you have identified the correct Organization.

return value	000385	UNIVERSITY OF MINNESOTA	200 Oak St SE, Suite 450, Sponsored Projects Administration, Minneapol...	416007513	MN-005	105419	555917996	KABJZBBJ4B54
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5. After selecting Return Value, select the **Add** actions to add this sub to the Collaborators panel.



6. If this sub is not found by searching, go the OSPA webpage to request this organization is added to the system.

KEY PERSONNEL:

OSPA requires that all Key Persons are added to the PD prior to Initial Review. This allows for a full check of Conflict of Interest or other compliance information when required by the sponsor.

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Add Key Personnel (PI, Co-PI, and all Key Persons) in the Key Personnel Tab.

The screenshot shows the 'Key Personnel' tab in the Streamlyne system. At the top, there is a header 'Key Personnel' with a dropdown arrow. Below it, a message states: 'All ISU staff who will be listed as Key Personnel on the sponsor proposal should be added in this section.' The main area is titled 'Key Personnel' and contains two radio button options: 'Internal User Name' (selected) and 'External Address Book ID'. Below these is a search input field with a magnifying glass icon. At the bottom, there is a table with columns for '* Person', 'Unit', and '* Proposal Role'. The 'Add:' row shows a 'select' dropdown menu and an 'Add' button.

See the Streamlyne Proposal Development (PD) User Manual, found on the [OSPA Streamlyne page](#), for full instructions on adding Key Personnel.

BUDGET

The budget provided and approved at Initial Review is to be considered a *final* budget. **Modifications may be made during the Initial Review process in coordination with OSPA, but once the initial review is approved by OSPA, no changes may be made.** Follow budget entry steps outlined in the Streamlyne Proposal Development (PD) User Manual, found on the [OSPA Streamlyne page](#), and/or Budget Job Aids and Tip Sheets found on the [Job Aids and Calculators](#) may also be helpful.

No sub docs are required, but *final* sub amount(s) must be included. This should include sub amounts entered by both burdenable and non-burdenable amounts. If the overall application of IDC (such as with some USDA NIFA or NIH modular budgets) depends on the sub indirect vs direct costs amounts, this must also be entered.

Subawards - Direct Costs Burdenable SBDIR	UNIVERSITY OF MINNESOTA	11,891.00
Show	Line Item Details	
Subawards - Direct Costs Burdenable SBDIR	NORTH CAROLINA STATE UNIVERSITY	10,183.00
Show	Line Item Details	
Subawards - Indirect Costs Burdenable SBIDC	UNIVERSITY OF MINNESOTA	5,095.00
Show	Line Item Details	
Subawards - Indirect Costs Burdenable SBIDC	NORTH CAROLINA STATE UNIVERSITY	4,364.00

HELP EMAIL: streamlyne@iastate.edu

WEBSITE: <https://www.ospa.iastate.edu/streamlyne>

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ABSTRACTS & ATTACHMENTS

Enter the **Abstract** (Project Summary) in the Abstracts panel of this section. The abstract can be brief but should accurately describe the basic elements of the project. If entering copied text in this section, check carefully that all text is transferred without special symbols. Click on the pencil to see the full text. If problematic text is present, it will be highlighted in red. All highlighted text should be removed or retyped in as needed. Select Add.

In addition to the Abstract, OSPA will look for the following uploaded attachments at Initial Review. The information below provides a listing of known attachments OSPA expects to see. Any files containing correspondence or notes that help us understand the proposal are strongly recommended. **Naming suggestions listed in this chart are *recommended*.** Please follow the sponsor's naming instructions if specifically outlined in their guidelines.

The required documents at Initial Review are listed below. If you are including documents that are not yet required, see the Final Review Tip Sheet for Attachment type, Naming Suggestions and upload location. You are welcome to add as many attachments as you have available at the Initial Review stage.

Document	Attachment Type	Description	Naming Suggestion	Where to upload
Guidelines	Guidelines	Not needed unless helpful to identify more than one type of guidelines added (multiple Guidelines may be attached)	Guidelines, Additional Guidelines (if more than one)	Internal Attachments
Correspondence inviting submission	Other Documentation	Not needed unless helpful to identify when more than one correspondence message uploaded.	Sponsor invite to submit	Internal Attachments
Limited Submission approval	Other Documentation	Email from the VPR or designated person, authorizing a limited submission	Limited sub approved	Internal Attachments
Agreement	Other Documentation	Not needed unless there is more than one, or a specific need to identify the agreement	Agreement	Internal Attachments

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Document	Attachment Type	Description	Naming Suggestion	Where to Upload
Budget*	Budget	Describe the additional type of budget included, e.g. sponsor budget, ISU BOB, etc.	Sponsor Budget, BOB, or other	Internal Attachments
ISU Budget Justification	Budget, Budget Justification or Budget Narrative (attachment type depends on upload location and may also be sponsor dependent when S2S)	Only needed if there is a specific type, or more than one type of budget justification.	Budget Just	Internal Attachments or Proposal Attachments (if S2S)
Tuition Calculator (can be either in a BOB or in the Tuition Calculator)	Other Documentation	No additional description needed.	Tuition Calculator	Internal Attachments
F&A Waiver	F&A Waiver	No description needed.	F&A Waiver	Internal Attachments
Cost Share Support Form	Cost Share	No description needed, unless not yet fully signed.	CSSF signed	Internal Attachments
Documents to be Signed	Other Documentation	No description needed unless file name is not descriptive enough.	Document name “to sign” – e.g. SF-LLL to sign	Internal Attachments

*Additional budgets, when required by the sponsor for submission, are ***strongly recommended*** at the time of Initial Review, as they may help ensure accuracy or identify inconsistencies with the Streamlyne budget. If a sponsor budget is not reviewed at Initial Review, the development of this budget should match the approved Streamlyne budget, and changes to either would prompt a new round of Initial Review (and thus additional days for the full review). Sponsor required additional budgets will be considered final once they have been reviewed.

Additional budgets not required by the sponsor, but added to the PD to help clarify budget development steps, will not be reviewed, unless used for tuition calculations. For example, when a BOB is added because it was used to help create the budget, but does not contain required information, it will not be reviewed.

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