

# 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 Streamlyne PD entry interface. On the left is a navigation menu with items: Proposal, S2S, Key Personnel, Special Review, Custom Data, Abstracts & Attachments, Questions, Budget Versions, Proposal Summary, Forms, Proposal Actions, Permissions, and Streams. The main content area is titled 'Required Fields for Saving Document' and contains the following information:

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

**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.

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** section. Specifically, be sure to identify whether 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' section of the form. It includes the following text:

- When the activity type is Research, the **Research Type** and the **NSF Science Code** fields must be completed for all proposals. **NSF Science Code** is not limited to NSF proposals.
- The **Notice of Opportunity** field must be completed.
- For other fields: if the information is not known, especially for non-Federal funding, fields in this section may be left blank.

\* Anticipated Award Type : Grant

Sponsor Award ID :

HELP EMAIL: [streamlyne@iastate.edu](mailto:streamlyne@iastate.edu)

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

UPDATED: 09/2024

# STREAMLYNE TIP SHEET PD FOR INITIAL REVIEW (CONT.)

## TIPS FOR FIELD ENTRIES AND ATTACHMENTS PRIOR TO INITIAL REVIEW (CONT.)

OSPA strongly recommends adding the PI and other ISU Key Persons in the Personnel Section for Initial Review. This allows OSPA to check for Financial Conflict of Interest for Key Persons, which is required with all NSF, HHS, NASA and DOE proposals. If these persons are not added until Final Review, this may delay the final approval of this PD.

Key Personnel

All ISU staff who will be listed as **Key Personnel** on the sponsor proposal should be added in this section.

Key Personnel ⓘ

Internal User Name  
 External Address Book ID

* Person	Unit	* Proposal Role
Add:		select

Add

See the [Streamlyne Proposal Development \(PD\) User Manual](#) 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](#), 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](mailto:streamlyne@iastate.edu)

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

UPDATED: 09/2024

# STREAMLYNE TIP SHEET PD FOR INITIAL REVIEW (CONT.)

## TIPS FOR FIELD ENTRIES AND ATTACHMENTS PRIOR TO INITIAL REVIEW (CONT.)

### ATTACHMENTS

In addition to the basic field entries and budget, OSPA will look for the following uploaded attachments at Initial Review. The information below provides a listing of known attachments OSPA expects to see. In addition, 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
Abstract	Select Project Summary under Abstract Type	NA	N/A- entered into field under Abstract Details	Abstracts
Budget*	Budget	Describe the additional type of budget included, e.g. sponsor budget, ISU BOB, etc.	Sponsor Budget, BOB, or other	Internal Attachments

HELP EMAIL: [streamlyne@iastate.edu](mailto:streamlyne@iastate.edu)

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

UPDATED: 09/2024

# STREAMLYNE TIP SHEET PD FOR INITIAL REVIEW (CONT.)

## TIPS FOR FIELD ENTRIES AND ATTACHMENTS PRIOR TO INITIAL REVIEW (CONT.)

Document	Attachment Type	Description	Naming Suggestion	Where to Upload
ISU Budget Justification	Budget Justification or Budget Narrative (depending on the FOA)	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 the 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, will not be reviewed.