

Initiator Instructions for Creating and Routing an Updated PD

An Updated PD is used for the following purposes:

- Replacing, adding, or removing PIs or Co-PIs
- Rearranging PIs (changing a Co-PI to a PI, or vice versa)
- Changing the PI's and/or Co-PI's incentive or contribution or financial splits
- Changing the Lead Unit*
- Changing the Streamlyne Reporting Unit (RU)*

An Updated PD is not used for revised budgets. DO NOT UPDATE THE STREAMLYNE BUDGET. For guidance on how to submit a revised budget to OSPA, please see [Budget Changes and Revised Budget Procedures for Campus](#).

An Updated PD is used to record the changes listed above at both the post-submission stage (any point after proposal submission, but prior to award), or after an award is received.

1. The Initiator should start by making a copy of the Previous PD. To do this, the Initiator will go to the **Proposal Actions** tab of this Previous PD and select the **Copy to a New Document** panel.
2. When making this copy, check the box(es) next to all items to include, and select the appropriate Lead Unit – *NOTE: If the Lead Unit or RU is changing, see the item 8 below on adding the previous Lead Unit and RU for Ad Hoc routing.
3. Once the copy is made, add any additional Aggregators needed to assist in this Updated PD prep. This is done in the **Permissions** tab of the Updated PD, **Users** panel, by choosing “Aggregator” in the **Role** dropdown box and adding the **User Name** and then clicking on the **Add** button.
4. In the **Proposal** tab, most entries should remain the same as with the Previous PD unless the change is specifically desired as a part of the update(s). Do change the deadline date to reflect the timeline in which this Updated PD needs to be reviewed and approved.
5. In the **Proposal** tab, in the **Institutional Fields Conditionally Required** subpanel of the **Required Fields for Saving Document** panel, enter the **Original Institutional Proposal ID** (the IP number assigned to the PD which had been used for submission to the sponsor and contains the OSPA approved proposal data in the IP record). The **Revision Type** to select is “Other (Specify).” The **Revision Other Description** should state either “Updated PD Pre-Award stage” if the update is occurring prior to award receipt, or “Updated PD Award stage” if the update is occurring following receipt of an award. An example is shown below:

Original Institutional Proposal ID :

Revision Type :

Revision Other Description :

6. To clearly indicate what prompted this Updated PD, provide details in the **Notes** panel of the **Abstracts and Attachments** tab. These details should include who requested this update, why the Updated PD is needed, and identification of all specific fields of the PD that have been changed.
7. If an email describing more information about the updates or why this Updated PD is needed (such as from the sponsor or from the PI), the Initiator should add that email to **Internal Attachments** under the **Abstracts & Attachments** tab.
8. *If the changes in this Updated PD include a change in Lead Unit and/or RU, it is necessary to add the Previous PD's Lead Unit and/or RU as Ad Hoc Recipients. See Ad Hoc Recipient Instructions in the [Streamlyne Proposal Development User Manual](#).
9. Once all the needed changes have been entered, the Initiator will route the Updated PD into Workflow using the **Route for Approvals** button on the **Proposal Actions** tab. **There is no need to route this Updated PD for Initial Review**, as **no budget changes** should be entered for Updated PDs.