DELETING A STREAMLYNE PD BEFORE IT HAS BEEN APPROVED BY OSPA

If it is determined that a PD is no longer needed, and OSPA has not yet approved this PD in Final Review, it can be deleted at any point. Below are instructions depending on the PD's status. (If the PD has been fully approved by OSPA, please ask them to delete this PD.)

**DELETING A PD PRIOR TO, DURING OR AFTER INITIAL REVIEW
(BUT BEFORE WORKFLOW, a.k.a. "Route for Approvals")**

If prior to Initial Review (PD has only been started and had initial development), the Initiator can simply select Delete Proposal, under Proposal Actions.
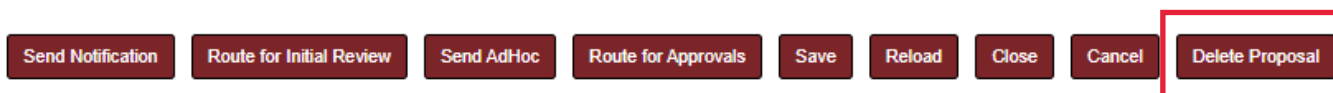
If the PD has been routed for Initial Review, the assigned OSPA reviewer can Return for Modifications <u>or</u> Complete the Initial Review. Both actions by OSPA allow the Initiator to again have control of the PD, and in both scenarios, the option to Cancel this Proposal will be available in Proposal Actions. "Cancel" functions that same way as Delete Proposal, in the previous options.

PLEASE NOTE: if the PD has been identified to have an error that requires copying and editing (such as in cases where the wrong lead unit was identified, or a low PD number is not recommended to proceed), the Initiator should **Copy this PD <u>prior</u> to selecting Cancel**. Follow the instructions to "Copy to New Document" in the Streamlyne Proposal Development (PD) User Manual, found in the OSPA Streamlyne page, for this process. When you return to the original PD, the Cancel option will still be available, and you can proceed with edits to the copied PD.

DELETING A PD WHILE THE PD IS IN WORKFLOW (a.k.a. Route for Approvals)

This can be done by anyone in the Workflow routing process, including OSPA. **It is strongly recommended that this is done with both Initiator and PI approval, as this action cannot be undone. A new PD will need to be initiated and routed to replace this PD.**

HELP EMAIL: streamlyne@iastate.edu   **WEBSITE:** https://www.ospa.iastate.edu/streamlyne   **UPDATED:** 02/2024

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If it is decided that a PD needs to be deleted while in Workflow (after the Initiator has Routed for Approvals), instruct the reviewer next in line to select **"Not Approved"**. This option will show up either in the Proposal Summary section, or the Proposal Actions section.

This reviewer will be asked to enter the reason for the disapproval. A brief rationale is recommended.

The further the PD has advanced prior to this "Not Approved" action, the more reviewers will need to **acknowledge** this action.

This action should delete this PD, **unless there are outstanding acknowledgements**. To check for these outstanding acknowledgements go to Proposal Actions > Pending Action Requests

Notify those who need to complete these acknowledgements. Once the acknowledgements have been completed, this PD will be deleted from the initiator's queue.

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