

# STREAMLYNE TIP SHEET

## REQUESTING SUB ORGANIZATIONS

### REQUESTING AN ORGANIZATION (SUB) BE ADDED OR UPDATED IN STREAMLYNE

#### How to request an Organization (sub) be added into Streamlyne

When a subrecipient organization needs to be added to a Streamlyne PD, first test that the sub is not already in Streamlyne. You can search for an existing Organization in two ways, in a PD or in the Main Menu of Streamlyne.

#### Searching in a Streamlyne PD:

1. Go to Proposal > Organizations, Performance Site & Collaborators > Collaborators
2. Select the magnifying glass to initiate a search

The screenshot shows the 'Collaborators' section of the Streamlyne PD interface. At the top, there is a search bar with a magnifying glass icon and a '(Select) Q' button. Below the search bar, there are several input fields for 'Organization Name', 'Address', 'Federal Employer Id', 'DUNS Number', 'DUNS Plus Four Number', 'CAGE Number', and 'Number Of Employees'. The 'Organization Name' field contains the text '%Kansas%' and is highlighted with a red box. The 'Search' button is also highlighted with a red box.

3. In Organization Name, enter the full name or the partial name of the sub. A partial name should be accompanied by the wild card symbols (% or \*) at the beginning and end, such as: Kansas State University -> entered as **%Kansas%**
4. Select Search
5. Return value on the Organization - if found (and ready to pull this Org into the PD)
6. If not found in this search, you have confirmed that this Organization is not in Streamlyne.

The screenshot shows the 'Organization Lookup' form and the resulting table. The form has several input fields for 'Organization Id', 'Address', 'Congressional District', 'Unique Entity Id', 'Human Sub Assurance', 'DODAC Number', 'Active', 'Organization Name', 'Federal Employer Id', 'DUNS Number', 'DUNS Plus Four Number', 'CAGE Number', and 'Number Of Employees'. The 'Organization Name' field contains the text '%Kansas%' and is highlighted with a red box. The 'Search' button is also highlighted with a red box. Below the form is a table with the following columns: Return Value, Organization Id, Organization Name, Address, Federal Employer Id, Congressional District, Contact Address Id, DUNS Number, Unique Entity Id, DUNS Plus Four Number, Human Sub Assurance, and Active. The table contains two rows of data.

Return Value	Organization Id	Organization Name	Address	Federal Employer Id	Congressional District	Contact Address Id	DUNS Number	Unique Entity Id	DUNS Plus Four Number	Human Sub Assurance	Active
return value	00017	ARKANSAS COMMUNITY FOUNDATION	AR			105347					Yes
return value	000186	KANSAS STATE UNIVERSITY	103 Fairchild Hall, 1601 Vetter St., Manhattan, KS 66506-1103		KS-002	107052	929773554	CFMMMS.M7HJ9			Yes

#### Searching in Main Menu:

1. Go to Main Menu > Settings > Organizations

The screenshot shows the Streamlyne Main Menu. The 'Main Menu' dropdown is open, showing options for 'Message(s) of the Day', 'Welcome to Streamlyne! ~ LIVE', 'To create a new proposal, navig...', and 'Additional resources are availa...'. The 'Settings' option is highlighted. The 'Organizations' option is also highlighted with a red box. The 'Organizations' option has a '+ Create new' button next to it.

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2. Enter the full name of the Organization, or a partial name with wildcards (\* or %) at each end of the entry.

Organization Lookup

Organization Id: <input type="text"/>	Organization Name: <input type="text" value=" %Kansas%"/>
Address: <input type="text"/>	Federal Employer Id: <input type="text"/>
Congressional District: <input type="text"/>	DUNS Number: <input type="text"/>

To request an Organization in Streamlyne

Go to <https://www.ospa.iastate.edu/>

This search will generate options that are already in Streamlyne. Here you can also see the Organization ID, if you wish to document that and use it later for your Org entry. If this search does not generate a result, you can then proceed to requesting the Sub Organization be added to the Streamlyne system.

### Requesting a New Organization:

1. Navigate to the Streamlyne Request forms on the upper right corner of this OSPA homepage.

Welcome to the Office of Sponsored Programs Administration at Iowa State University

#### Our Mission

The Office of Sponsored Programs Administration (OSPA) promotes and facilitates the research, education, and outreach missions of Iowa State University by supporting and administering research and sponsored programs.

#### Streamlyne Request Forms

- New Sponsor
- **New Organization (Subrecipient)**
- Update Organization (Subrecipient) Address
- New External Person
- New Credit Split for RU F&A Distribution

2. Click on New Organization (Subrecipient) link to be taken to the request form.
3. Enter as complete information as you have.

A few things you may want to have ready before you initiate this request form:

- Subrecipient type (non-profit, Federal, County, etc.,)
- Subrecipient Unique Entity Identified (UEI) if applies/known
  - This can be located at Sam.gov, on an Institutional information page (a web search will usually find this), or we recommend you request it from the sub.
- Full organization address, including 9-digit zip code
- Congressional District
  - Search for this by zip code or by State at the US Census Bureau <https://www.census.gov/mycd/>
- Due date of the proposal

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This request may take 24 hours. Please submit the request as soon as possible in your proposal development process, and follow up if you are unsure of the status.

#### How to request an Organization Address update in Streamlyne

If a Sub Organization is already in the system, but you recognize that the address is incomplete or incorrect, you can also submit a form to update that address. *This is not intended to be used when you want to identify an alternate location at that Organization for a Performance Site. If an alternate location needs to be entered, and it is a S2S submission, please consult with OSPA for assistance.*

Select **Update Organization (Subrecipient) Address** at top right corner of the OSPA webpage to select this option and complete the fields.

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The data needed in this form matches the data in the New Organization (Subrecipient) form. See above for that list of specific organization/address items to have available to fully complete this request.