

STREAMLYNE TIP SHEET PD FOR INITIAL REVIEW

TIPS FOR FIELD ENTRIES AND ATTACHMENTS PRIOR TO INITIAL REVIEW

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 displays 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

A note states: 'In order to "Save" the proposal and obtain a Proposal Number, all fields found in the Required Fields for Saving Document panel are required as well as the Anticipated Award Type field found in the Sponsor & Program Information panel. With the exception of the Lead Unit, saved information can be edited prior to submission.'

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.

In addition to the Required Fields for Saving, OSPA recommends filling in other data throughout the PD when possible. OSPA can review these entries or uploads, and simply return to the initiator for corrections, rather than returning for revision during final review, which then requires the approval of multiple reviewers in the workflow. See the *Final Review Tip Sheet* for a preview of the items that *can* be completed at initial review.

The ISU budget should be entered for initial review. This should include sub amounts. This 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 the *budget development guide* for instructions in this process. No sub docs are required, but *final* sub amount(s) must be included.

In addition to the entries highlighted above, 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.

HELP EMAIL: streamlyne@iastate.edu

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

UPDATED: 08/2023

STREAMLYNE TIP SHEET PD FOR INITIAL REVIEW (CONT.)

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

Naming suggestions listed in this chart are *recommended*. Please follow the sponsor's naming instructions if specifically outlined in their guidelines.

Document	Description	Naming Suggestion	Where to upload	Attachment Type
Guidelines	Full FOA, BAA, RFP or other instructions from sponsor	Guidelines	Internal Attachments	Guidelines
Correspondence inviting submission	Needed when there are no guidelines attached, or to clarify why we are submitting	Sponsor invite to submit	Internal Attachments	Other Documentation
Additional guidance	Guidance giving additional detail not addressed in guidelines, i.e. website snip re allowable IDC.	Additional guidelines	Internal Attachments	Other Documentation
Limited Submission approval	Email from the VPR or designated person, authorizing a limited submission	Limited sub approved	Internal Attachments	Other Documentation
Agreement	An agreement or draft agreement, outlining the parameters of the project, which may include funding terms.	Agreement	Internal Attachments	Other Documentation
Abstract	Not an attachment , but found in the Abstracts and Attachments, entry required for Initial Review. This should be <i>brief</i> , for internal purposes, to identify proposal components.	N/A- entered into field under Abstract Details	Abstracts	Select Project Summary under Abstract Type
ISU Budget Justification	Budget Justification	Budget Just	Internal Attachments – or- if part of S2S submission, then Proposal Attachments	Budget Justification (or Budget Narrative depending on FOA selected)
F&A Waiver	IDC (F&A) Waiver, fully signed, authorizing reduction or full waiver of IDC.	F&A Waiver	Internal Attachments	F&A Waiver
Cost Share Support Form	Fully Signed Cost Share Support form, if Cost Share is included in the budget	CSSF signed	Internal Attachments	Cost Share
Documents to be Signed	Documents required for proposal submission, to be signed by OSPA other authority (Dean, VPR etc.).	Document name “to sign” – e.g. SF-LLL to sign	Internal Attachments	Depends on document. Select the type that best identifies the doc.

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