

Updated PD Initiator Instructions

An Updated PD is used for the following purposes:

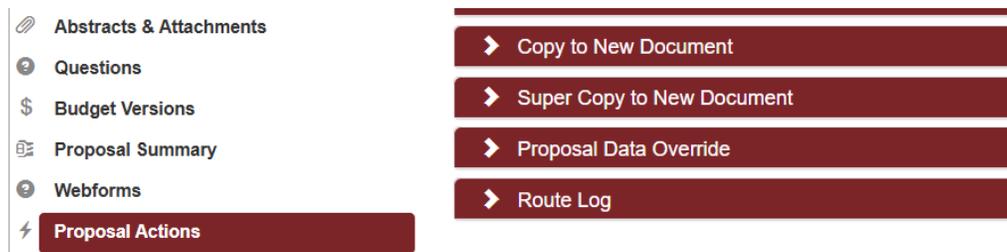
- Replacing, adding, or removing PIs or Co-PIs
- Rearranging PIs (changing a Co-PI to a PI, or vice versa)
- Changing the PI's and/or Co-PI's incentive or contribution or financial splits
- Changing the Lead Unit*
- Changing the Streamlyne Reporting Unit (RU)*

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.

NOTE: When this process involves a lead unit change, the Initiator/Aggregator must have access to the original PD and also the copied PD. If there is a case when this access is restricted, please notify OSPA. OSPA may be able to make a copy of this PD or connect you with another campus support resource to assist in this process.

1. The Initiator should start by making a copy of the **Original** PD. The Original PD may be the first/only PD routed for this project, or may be a subsequent PD routed to reflect a revision to the project. The primary concern is finding the PD with the most up-to-date information and also ensuring you are connecting to the correct IP. Please consult with your Pre-Award or Post-Award Administrator if you need assistance identifying which PD to copy. To make the copy, the Initiator will go to the **Proposal Actions** tab of this original 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. As an exception, when the original submission was a S2S submission, uncheck that box. The S2S details will not carry over to the copied PD, but will still remain available in the original PD.
3. Select the proper Lead Unit. (If the Lead Unit and/or RU is changing, see item 8 below on adding the Original Lead Unit and RU for Ad Hoc routing).
4. 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.
5. In the **Proposal** tab, most entries should remain the same as with the original 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.
6. 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 :

7. 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.
8. If an email is available 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.
9. *If the changes in this Updated PD include a change in Lead Unit and/or RU, it is necessary to add the original PD’s Lead Unit and/or RU as Ad Hoc Recipients. See Ad Hoc Recipient Instructions in the [Streamlyne Proposal Development User Manual](#).
10. 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.