

# STREAMLYNE TIP SHEET PD FOR FINAL REVIEW

## TIPS FOR FIELD ENTRIES AND ATTACHMENTS PRIOR TO OSPA FINAL REVIEW

After a PD has been approved at the Initial Review (IR) stage, the remaining field entries and attachment uploads will need to be completed prior to workflow routing and final approval. See the *PD for Initial Review* Tip Sheet to review what was completed at that stage. As mentioned in that Tip Sheet, the entries and uploads outlined in this tip sheet *can* be completed at the IR stage, to allow for a more comprehensive IR. Items missed or entered incorrectly at Final Review stage require a new round of workflow routing.

The following information outlines the field entries as the PD is prepared for Final Review. An [X] indicates that a field is mandatory. An [\*] indicates that there are conditions to whether a field needs to be filled in. The entries are organized by section of the PD in Streamlyne.

SECTION / Category	Final	S2S	Notes
<b>PROPOSAL</b>			
Sponsor and Program Information: Sponsor Deadline Type	X		
Internal Deadline Date	X		
Sponsor Name	X		
Prime Sponsor Name	X		
Research Type	*		If activity type is Research/ NA if Other.
NSF Science Code	*		If activity type is Research/ NA if Other.
NSF Division Code	*		Only needed if NSF proposal.
Does the Proposal Include Subrecipients	*		If applies.
Notice of Opportunity	X	X	Select Type of Notice.
Opportunity ID	*	X	Not applicable when not S2S - will populate when linked.
Opportunity Title	*	X	Not applicable when not S2S - will populate when linked.
CFDA Number	*	X	If applies, and if found in FOA.
CFDA Title	*	X	If applies, and if found in FOA.
Prev. Grants.gov Tracking ID	*		If applies- generally only needed if resubmission or corrected.
Agency Routing Identifier	*		If applies- generally only needed if resubmission or corrected.
Sponsor Award ID	*		If applicable.
Organizations, Performance Sites & Collaborators: Applicant Organization	X		
Performing Organization	X		DO NOT CHANGE.
Performance Site Locations		X	Only required if additional location to be added, when S2S
Collaborators	*	*	Required if subs are involved.
Delivery Info: Submitted By	X		
Delivery Comments	*		Optional; if needed to clarify process of submission.
Delivery Type	X		
Keywords: Description	*		List country: mandatory for foreign country involvement.

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SECTION / Category	Final	S2S	Notes
Document Template: Current Template In Use & Change Template	NA		Do not use.
<b>S2S</b>			
Opportunity/ Submission Details/ Forms		X	Web form entries.
<b>KEY PERSONNEL</b>			
Key Personnel	X		Initiator adds personnel here.
Proposal Certification	X		Completed by PI/CO-PIs at time of workflow approval.
Combined Credit Split	X		Select the appropriate percentage splits, must equal 100%
RU F&A Distribution	X		Generated from Combined Credit Split entries. Cannot be modified.
<b>SPECIAL REVIEW</b>			
Special Review: Type IACUC or IRB	*	*	If applies to project.
<b>CUSTOM DATA</b>			
Campus Entered Data: Center Director Incentive (Y/N)	*		Optional- depends on Center Director.
Performance Site - Off Campus Perf. Site	*/X		Must select one or the other of these, or both if applicable.
Performance Site - Primary ISU Site	*/X		Must select one or the other of these, or both if applicable.
Worktag/Account# - Current	*		Optional, typically applies for supplement or continuation.
Worktag/Account# - Previous	*		Optional, typically applies for supplement or continuation.
<b>QUESTIONS</b>			
Grants.gov S2S Questionnaire		X	Required if S2S.
Research Categories	*		Required if Research, if "other"- can leave blank.
Proposal Questions	X		
Compliance Questions	X		
Contractual Questions	X		
On-Off Campus F&A Rate Determination	NA		Not Required- resource only.
International Activities Questions	X		
ISU Resource Questions	X		
Project Funding Questions	X		
Gift or Sponsored Projects Screening	NA		Not Required- resource only.
PHS398_CoverPageSupplement_5_0-V5.0		X	Required if S2S/ NIH only.
<b>BUDGET VERSIONS</b>			<b>Subrecipient budget detail required at FINAL.</b> Must match amount indicated at IR. If S2S, utilize <i>Adding a sub budget with budget justification in SL Tip Sheet</i> for more info. Follow general budget guidance when entering sub amounts in Non-S2S proposal. Mark full budget as Complete and Final.

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SECTION / Category	Final	S2S	Notes
<b>PROPOSAL SUMMARY</b>			View proposal details. PIs can go to this section to select Proposal Person Certification (also in Key Personnel).
<b>FORMS</b>			Only applies to S2S.
<b>PROPOSAL ACTIONS</b>			For routing, saving, copying, pending actions requests, etc.
<b>PERMISSIONS</b>			View assigned roles, or add users.
<b>STREAMS</b>			No data entry.

When routing for FINAL REVIEW, OSPA will look for the following uploaded documents to finalize the review. Naming Suggestion does not override the sponsor's specific naming guidance.

Document	Description	Naming Suggestion	Where to upload	Attachment Type
Narrative	Draft or final narrative describing project.	Narrative or Project Description	Internal Attachments unless required to be pulled into S2S- then Proposal Attachments	Narrative
Subaward budget (Non S2S)	Subaward budget in detailed form	(Sub Name, abbreviated) Budget – e.g. <i>U of Iowa Budget</i>	Internal Attachments	Subrecipient Documentation
Subaward budget justification (Non-S2S)	Any budget justification that will not be submitted via S2S	Sub Name, abbreviated) Budget – e.g. <i>U of Iowa Budget Just</i>	Internal Attachments	Subrecipient Documentation
Subaward budget (S2S)	Subaward budget in R&R format for S2S submission (find R&R budget in S2S, Forms)	(Sub Name, abbreviated) Budget – e.g. <i>U of Iowa Budget</i>	Uploaded into Budget Versions (select/open budget) -> Budget Actions -> Subaward Budget	(form name) RR_Subaward_Budget_3.0-V3.0
Subaward budget justification (S2S)	Budget justification that will be submitted vis S2S	(Sub Name, abbreviated) Budget Just– e.g. <i>U of Iowa Budget Just</i>	Uploaded as attachment within S2S subaward budget attachment.	NA, not an individual upload in Streamlyne

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Subaward SOW	SOW; enough detail to identify the sub's work vs the overall project SOW	(Sub Name, abbreviated) SOW – e.g. <i>U of Iowa SOW</i>	Internal Attachments	Subrecipient Documentation
Subaward Transmittal Letter	Signed, dated, commitment letter from sub- agreeing to participate in project.	(Sub Name, abbreviated) trans letter – e.g. <i>U of Iowa trans letter</i>	Internal Attachments	Subrecipient Documentation
Other attachments needed for S2S submission	Not required for Final Review OSPA approval, but OSPA will look for these to be complete prior to submission.	Name according to FOA instructions, or to identify document accurately.	Proposal Attachments	Check that attachment type matches FOA instructions, and check that the attachment type selected pulls the document into the S2S/ forms/ printed forms.

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