Streamlyne:
Quick Proposal Overview for Unfunded Agreements

Melissa Sanchez, Sr. Sponsored Projects Officer
Office of Sponsored Projects
RAN meeting - June 13, 2023
Streamlyne Quick Proposals for Unfunded Agreements

- Non-Disclosure Agreements (NDAs)
- Material Transfer Agreements (MTAs)
- Data Transfer/Sharing/Use Agreements (DUAs)
- Unfunded Collaboration Agreements
- Unfunded Memoranda of Understanding (MOUs)
- Master Agreements (MAs and BOAs)
  - Other Unfunded Agreements
Streamlyne Quick Proposals
- Create New Record

From the Main Menu drop-down, under Pre-Award, select ‘Create New’ next to Quick Proposal.
Streamlyne Quick Proposals
- Quick Proposal Tab

Quick Proposal Type = Unfunded Agreements
Proposal Type = Unsolicited Contract

Using these two selections will help identify the record as an unfunded agreement for assignment to a Contract Specialist.

Description and Title are both required fields. These fields can be used to describe the type of contract or arrangement being set up between UNM and the Sponsor.

For example: NDA between UNM and Lockheed Martin.
Streamlyne Quick Proposals
- Quick Proposal Tab

Principal Investigator should match the PI who will be responsible for oversight of the agreement. If a PI is named in the contract itself, that PI needs to be the PI of record in the QP record.

Lead Unit populates automatically with PI selection.

Sponsor – this MUST be completed for OSP to approve the record; Please ensure Sponsor is in Streamlyne before routing the record to OSP.

Please fill out Comments and Deadline Date as applicable.
Streamlyne Quick Proposals
- Requesting New Sponsor in Streamlyne

If a Sponsor is not in Streamlyne, submit a request to add the Sponsor via this link:

https://forms.unm.edu/forms/new_sponsor_and_subrecipient_requests

This link can also be found on the OSP Website Homepage and under the PI Resources in the Procedures and Guidelines

Provide the following information about the Sponsor in the request:

1. Full legal name
2. Mailing Address
3. General Telephone Number
4. Website address
Streamlyne Quick Proposals
- Completing Quick Proposal Tab

Once all information has been populated in the Quick Proposal Tab, select ‘Save’ at the bottom of the screen to continue to the next tab.
The following sections will not apply to unfunded agreements; however, the initial question for each section must indicate ‘No’ in order for each section to reflect ‘(Complete)’:

- Proposal Actions
- Award Modification Actions
- Subaward Administration

Principal Investigator Certification is required for all agreements.
Streamlyne Quick Proposals
- Questionnaire Tab

The Unfunded Agreements questions **MUST** be completed for all unfunded agreements.

There are a total of 14 questions and, depending on the response, additional sub questions and embedded forms may become available.

This section includes questions OSP typically requests on additional forms so is intended to reduce administrative burden by collecting:
- the agreement
- Sponsor contact information
- IT PSQ (if applicable)
- DSQ (if applicable)
- ECES (if applicable)
- IRB or IACUC information (if applicable)
- Additional compliance requirements (if applicable)

1. Is this record for an Unfunded Agreement action?
   - Yes
   - No
Streamlyne Quick Proposals
- Questionnaire Tab

These sections will apply to Material Transfer Agreements only. The questions are intended to replace the MTA Questionnaires sent to PIs for completion.

MTA – Inbound = when materials are incoming to UNM from another entity

MTA – Outbound = when materials are outgoing from UNM to another entity
Streamlyne Quick Proposals
- Questionnaire Tab

All sections of the Questionnaire tab must indicate '(Complete)' for the record to move forward.
Streamlyne Quick Proposals
- Quick Proposal Actions Tab

Turning on Data Validation will identify if any required sections have not been completed.

Data Validation errors will keep the record from being submitted and routed to OSP.
If there are any additional attachments that go with the agreement, or communications that will be helpful to processing the agreement, they can be uploaded in the Notes and Attachments section.

Once the record is complete and no validation errors exist, select ‘Submit’ to route the record.
Streamlyne Quick Proposals

- QP Record Routing

  - Quick Proposal records route from the Initiator (person creating the record) to the PI identified on the record, unless the PI is the record Initiator

  - Once the PI approves the record from their Action List it will route to OSP’s Action List

  - OSP monitors the Action List throughout the week for new records that need to be assigned
Streamlyne Quick Proposals

- QP Record Routing

The Route Log in the Quick Proposal Actions tab will allow you to see whose queue the record is pending action with.
Streamlyne Quick Proposals

- QP Record Assignment

  • Once a record is assigned to a Contract Specialist, the Specialist reviews the record to ensure that all information and documents needed have been provided and the questions have been completed.

  • If there is any missing information in the record, attachments are not uploaded, or OSP needs additional information to move forward, the Contract Specialist will reach out via email to obtain clarification and/or may send the record back to the Initiator and PI for correction.
Streamlyne Quick Proposals

- QP Record Return to Department

<table>
<thead>
<tr>
<th>Route Log</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ID: 64471</strong></td>
</tr>
<tr>
<td><strong>QuickProposalDocument</strong></td>
</tr>
<tr>
<td><strong>Title</strong></td>
</tr>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td><strong>Initiator</strong></td>
</tr>
<tr>
<td><strong>Route Status</strong></td>
</tr>
<tr>
<td><strong>Node(s)</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actions Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action</strong></td>
</tr>
<tr>
<td>SAVED</td>
</tr>
<tr>
<td>COMPLETED</td>
</tr>
<tr>
<td>APPROVED</td>
</tr>
<tr>
<td>RETURNED TO PREVIOUS ROUTE LEVEL</td>
</tr>
<tr>
<td>APPROVED</td>
</tr>
<tr>
<td>APPROVED</td>
</tr>
<tr>
<td>APPROVED</td>
</tr>
</tbody>
</table>

- QP records that are returned for correction route back to the record Initiator.
- Once the Initiator has made the necessary changes communicated by the Contract Specialist via email, the Initiator will ‘Approve’ the record.
- The record then routes to the PI to also ‘Approve’ it.
- After the PI approves the record, it routes back to OSP’s Action List.
- Once OSP approves the record, this will show in the Route Log history.
Streamlyne Quick Proposals

- Negotiation Record Notification of QP Approval

Prior to the approval of the QP record, the Contract Specialist will send out a notification to the PI and record initiator to inform them that the QP record will be approved and moved forward to contract review and, if necessary, negotiations.

Please be advised that approval of the QP record does not mean the agreement has been signed, just that it is moving forward in the contract process.

Contract Negotiations for QP Record 00072505

Streamlyne Research <production-research@unm.streamlyne.org>
To: Melissa Sanchez, Christos Christodoulou, Iolana Roeder

[EXTERNAL]

Negotiation record 53 has been created to process the Teaming Agreement with Metis received under QP Record 00072505. The QP record will be approved as all documentation has been received at this point to proceed with processing the contract. Please note that this 'Approval' does not mean the contract has been executed, only that it is moving forward to the next step for negotiation. Please reach out to Melissa via email mmarti47@unm.edu if you have any questions. To open, click here.

Negotiator: Melissa Sanchez
Negotiation Status: In Progress
Title: Metis Teaming Agreement
Principal Investigator: Christos Christodoulou
Lead Unit: COSMiac (282A)

To access the Negotiation record identified, click on the hyperlink in the notification.