

Quick Tips



How to Submit a Proposal for Review in Streamlyne

Prepare for Submission:

Make a Proposal Review Appointment with the Office of Sponsored Projects (OSP). Review sponsor requirements and *ensure all proposal elements are complete and ready for submission* by the time of your Proposal Review.

Schedule your proposal review

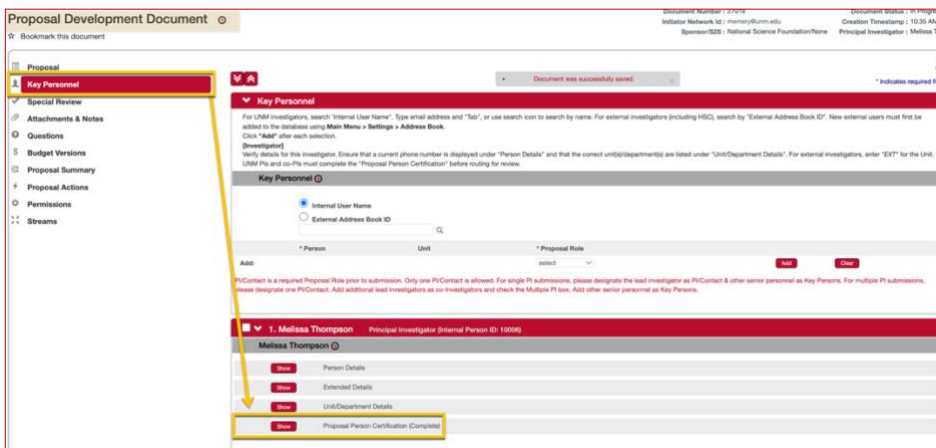
Final Checks:

1. A budget version must be selected and identified as **Final** and **Complete**.



| Budget Versions (09/01/2022 - 08/31/2024) | | | | | | |
|--|----------------------|-----------|-------------|-----------|------------|--|
| To get started, type a name for the budget and click "Add". Multiple draft budgets may be created, but one must be checked as "Final" before submitting. | | | | | | |
| Budget Versions | | | | | | |
| | * Name | Version # | Direct Cost | F & A | Total | Final Budget Status Actions |
| Add: | <input type="text"/> | | | | | <input type="button" value="Add"/> |
| Show | updated | 2 | 100,000.00 | 39,000.00 | 139,000.00 | <input checked="" type="checkbox"/> Complete <input type="button" value="Open"/> <input type="button" value="Copy"/> |
| Show | a | 1 | 100,000.00 | 0.00 | 100,000.00 | <input type="checkbox"/> Incomplete <input type="button" value="Open"/> <input type="button" value="Copy"/> |

2. All UNM PIs and Co-investigators should complete the **Proposal Person Certification** located in the Key Personnel section.



Proposal Development Document

Document was successfully saved.

Key Personnel

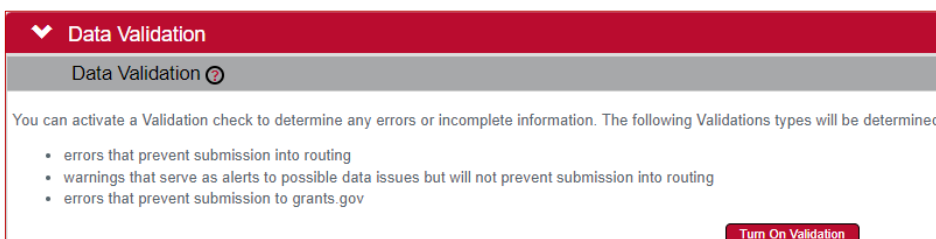
For UNM investigators, search "Internal User Name". Type email address and "UNM", or use search icon to search by name. For external investigators (including HSC), search by "External Address Book ID". New external users must first be added to the database using **Main Menu > Settings > Address Book**. Click "Add" after each selection. [Investigator]

Verify details for this investigator. Ensure that a correct phone number is displayed under "Person Details" and that the correct unit(s)/department(s) are listed under "Unit/Department Details". For external investigators, enter "EXT" for the UNM PIs and co-PIs must complete the "Proposal Person Certification" before routing for review.

| * Person | Unit | * Proposal Role |
|---|--|-----------------|
| Add <input type="button" value="Add"/> <input type="button" value="Clear"/> | | |
| 1. Melissa Thompson | Principal Investigator (Internal Person ID: 10000) | |

Person Details
 Extended Details
 Unit/Department Details
 Proposal Person Certification (Complete)

3. Check proposal for errors using **Data Validation**, located in the **Proposal Actions** section.



Data Validation

Data Validation

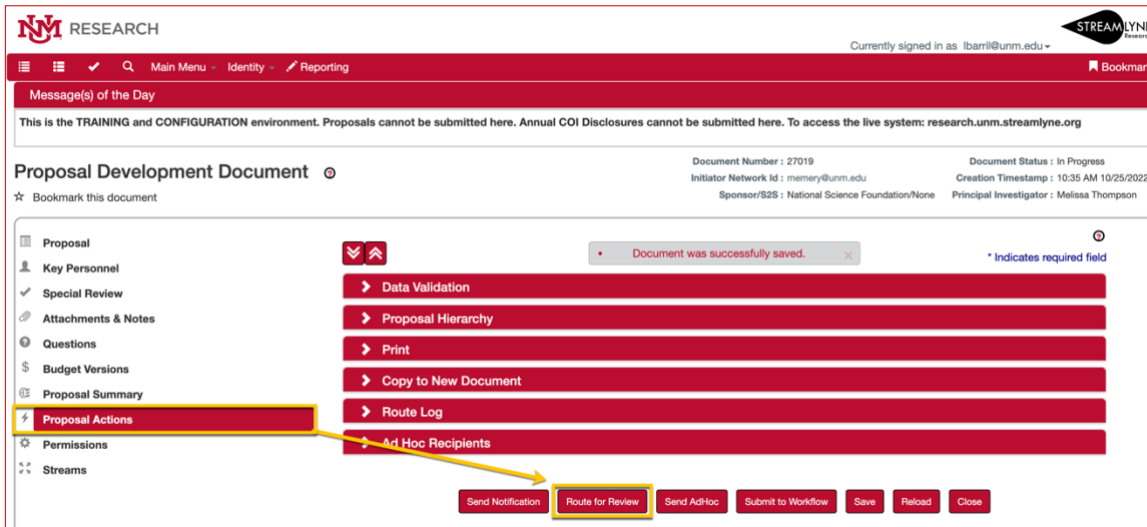
You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov



Initial Review & Submission

1. Prior to your proposal review appointment, navigate to the **Proposal Actions** and click **Route for Review** to indicate your proposal is ready for initial review. While in initial review, most sections of the proposal will be locked for editing, but you can still add, delete, or replace attachments.



2. During the OSP proposal review appointment, a Sponsored Project Specialist will carefully check the proposal for completeness, accuracy, and compliance with all Sponsor, University, and legal requirements. You will have the opportunity to make necessary revisions during this time.
3. After the proposal review appointment, the Sponsored Project Specialist will route the proposal for approvals. PIs first approve the submission, followed by unit and higher-level administrators.
4. PI approval indicates the proposal is ready to submit. The proposal will be submitted to the sponsor on time. Administrative approvals must be completed within 72 hours of the sponsor deadline. If the project is not approved, the proposal will be withdrawn.