**Guide**

Proposal, Sponsor & Program Information

Contents

Overview

This manual covers the information in the **Proposal** section of Streamlyne, which includes the general information on the project, when and where it will be conducted, the sponsor, collaborators, and how the proposal will be submitted. This is the first section to appear when a new proposal document is created.

Each red "panel" can be expanded to complete and verify project information. Required fields within the panels are marked with an asterisk (*).
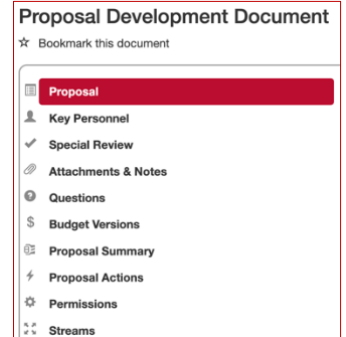
Required Fields for Saving Document

REQUIRED FIELDS FOR SAVING DOCUMENT

This information must be completed to save a proposal document. Press **Save** when complete. All fields are required. Saved information can be edited prior to submission with the exception of the **Lead Unit ID**.

- **Proposal Number**: A proposal number will be autogenerated the first time the proposal is saved. This number can be used as a reference to your proposal record.
- **Sponsor Code**: Direct source of funding. Use magnifying glass icon to search for sponsor.
  - If UNM is the lead organization, enter the funding agency.
  - If UNM is a applying for a subaward, enter the direct source of funds (e.g., university or organization)
  - If the sponsor is not found, contact mailto:osp@unm.edu.

SEE ALSO: HOW TO PERFORM SEARCHES IN STREAMLYNE

- **Lead Unit ID**: Select organization code for the Department or other Unit leading the proposal.
- **Project Start Date**: Type (mm/dd/yyyy) or use calendar icon to select the proposed project start date.
- **Project End Date**: Type (mm/dd/yyyy) or use calendar icon to select the proposed project end date.

- **Activity Type**: Use drop-down menu to select the type of funding instrument. Selection will determine the applicable F&A rates.
- **Submission Type:** Use drop-down menu to select Application, Pre-application, or Change/Corrected Application.
- **Sponsor Deadline Date**: Type (mm/dd/yyyy) or use calendar icon to select the date that the proposal is due to the sponsor.
- **Sponsor Deadline Time:** Type (hh:mm XM) or use clock icon to select the time – in Mountain Time -- that the proposal is due to the sponsor.
- **Project Title:** Official title of project to be submitted to sponsor.

INSTITUTIONAL FIELDS CONDITIONALLY REQUIRED

Use to link a proposal revision to a previous Streamlyne award or proposal record. Most proposals will not use this section.

- **Award ID**: Use magnifying glass icon to search for an existing UNM award record.
- **Original Institutional Proposal ID**: If the revision refers to a proposal on which an award has not yet been processed, use the magnifying glass icon to search for a previously-submitted proposal.
- **Revision Type**: Use drop-down menu to select type of proposal revision, or type into **Revision Other Description.**
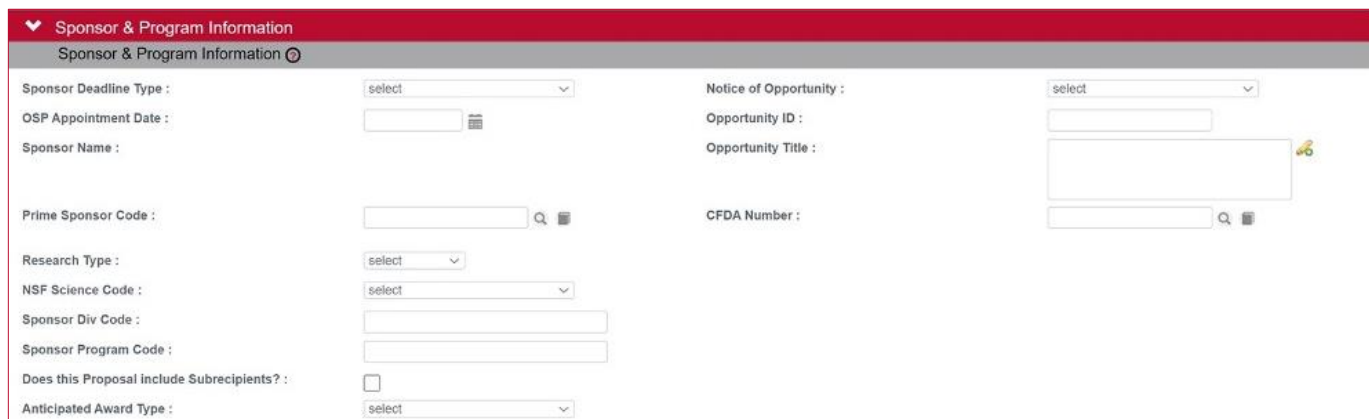
Sponsor & Program Information

Provide information on the funding mechanism. Some fields are optional but may be required for certain funding mechanisms.
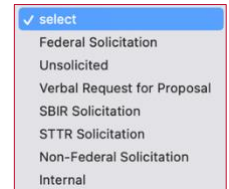
REQUIRED FIELDS

- **Sponsor Deadline Type**: Indicate whether the **Sponsor Deadline Date** indicated is a deadline for *Receipt* or a *Target* date.
- **Notice of Opportunity**: Use drop-down menu to select the mechanism used to communicate information about the funding opportunity, i.e., the type of solicitation.
- **OSP Appointment Date**: A review appointment with an Office of Sponsored Projects is required for submission of all proposals. Make an appointment at the OSP website: https://osp.unm.edu/. Once the appointment is confirmed, type the date (mm/dd/yyyy) or use the calendar icon to select the date.
- **Opportunity Title**: Program title or name of program announcement assigned by the sponsor agency.
- **Sponsor Name:** Direct source of funds. Will be autofilled from the **Required Fields for Saving Document** panel.
- **Anticipated Award Type:** From the drop-down menu, select the type of funding you are applying for.

OPTIONAL FIELDS (REQUIRED FOR SOME PROPOSALS)

- **Opportunity ID**: The identifier associated with the sponsor's funding opportunity or solicitation announcement. Sometimes called Funding Opportunity Announcement (FOA).
- **Prime Sponsor Code**: If the project is a subaward to UNM, use the magnifying glass icon to search for the original source of funds (e.g., a funding agency). If UNM is the lead organization on the proposal, leave this field blank.
- **CFDA Number:** The 5-digit code assigned by the Catalog of Federal Domestic Assistance used to identify federal funding solicitation.
- **NSF Science Code**: Use drop-down menu to select an option that most closely defines the area of research being conducted. Codes are required for National Science Foundation
- **Research Type:** Use the drop-down menu to select the type of project. If not research, leave blank.
  - *Basic*: Work undertaken primarily to acquire new knowledge or understanding of the fundamental aspects of phenomena and of observable facts, without any particular application or use in view.
  - *Applied:* Work taken to acquire new knowledge or understanding in order to meet a specific practical application.
  - *Translational:* A subset of applied research aimed at converting results from basic research into results that directly benefit humans. Often used in biomedical research.
  - *Development*: Work directed to producing new products or processes or improving existing products or processes.
- **Does the Proposal Include Subrecipients?**: Tick the box to indicate whether the project includes subaward agreements.

Organizations, Performance Sites & Collaborators

This pane, located in the Proposal section of the Proposal Development Quick Menu, identifies all locations where components of the sponsored research will be conducted.

APPLICANT ORGANIZATION:

These panels identify the official authorized organization that will assume legal and financial responsibility for the award and for the performance of the supported activity.

UNM will be the **Applicant Organization**. UNM will autopopulate this panel when a new proposal is saved.

To identify a different Applicant Organization, select the magnifying class to open the Organization Lookup.

- This will ordinarily only be necessary in specific cases where a UNM branch campus has been selected as the winner of a limited competition and will be submitting under their own UEI numbers. Most other branch campus proposals should be submitted under UNM's main campus UEI.
- If UNM is applying for a subaward to another organization, UNM will still be the **Applicant Organization** for the Streamlyne record. Be sure that the organization that is the direct source of funds (i.e., the lead organization providing the subaward) is listed as the **Sponsor** in the Streamlyne record.

COLLABORATORS & SUBRECIPIENTS

Use this section to identify subrecipient organizations and other collaborating organizations (e.g., those with Key Personnel).

1. Use the magnifying glass to access the **Organization Lookup**.
   - If the correct Organization is found, select it, confirm that the correct information is shown
   - If the correct Organization is not found, contact Office of Sponsored Project (mailto:osp@unm.edu) to add it.
2. Important: You must click the red **Add** button to complete the addition of an organization to the proposal.

3. Multiple collaborating organizations may be added in this section.

PERFORMANCE SITES

This section identifies any *additional* places where project work will be performed.

Organizations already identified as the Applicant Organization or as a Collaborator/Subrecipient will already be listed as **Performance Sites** and <u>do not</u> need to be selected again in the Performance Sites panel.
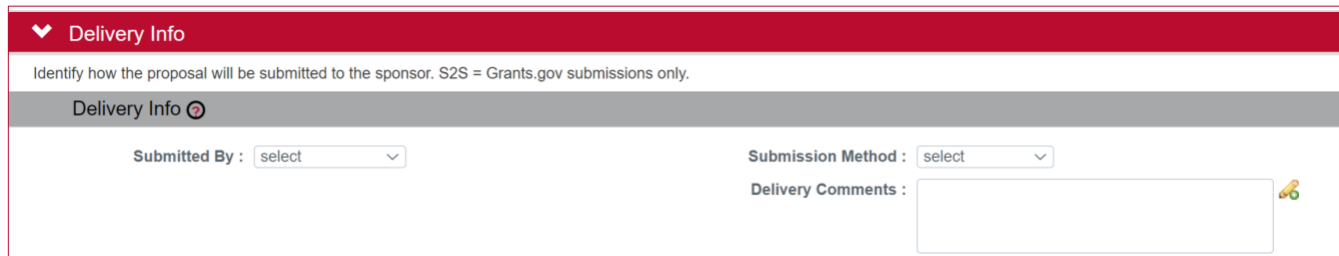
Like the other panels, **Performance Sites** has a lookup field accessible by clicking the magnifying glass icon. If the site is not found, a site can be added on the fly by creating an **Address Book** entry.

To add a performance site, follow the steps above for Collaborators & Subrecipients.

SEE ALSO: HOW TO USE THE ADDRESS BOOK

Delivery Info

This panel is used to provide important information on how the proposal will be submitted to the Sponsor.

- **Submitted By:**
  - OSP: Sponsor requires that the proposal is submitted by an Authorized Organization Representative (AOR). This includes most federal grant submissions in Grants.gov, Research.gov, or other portals.
  - Department: Sponsors, such as private foundations, accepts proposals directly from investigators via email, mail, or online portal. These may only be submitted following review and approval from OSP.
  - UNM Foundation: Proposal will be submitted by the UNM Foundation.

- **Submission Method:** Indicate the method by which the proposal will be transmitted to the sponsor.

Keywords

Click the magnifying glass icon to search and select 2-3 keywords for the proposal. This information is for internal purposes and will be used to help link investigators to new funding opportunities.