

Guide to Submitting Solicited Full Proposal Applications through UNM

Note: All sponsored project proposals (grants, contracts, subawards) must be entered, routed and approved in Streamlyne (SL) prior to submission to the sponsor. You can use your UNM credentials to log in to Streamline [here](#). All the following steps must be completed before your review appointment with the Office of Sponsored Projects (OSP). Proposals vary in complexity. More complex proposals may require additional steps/considerations.

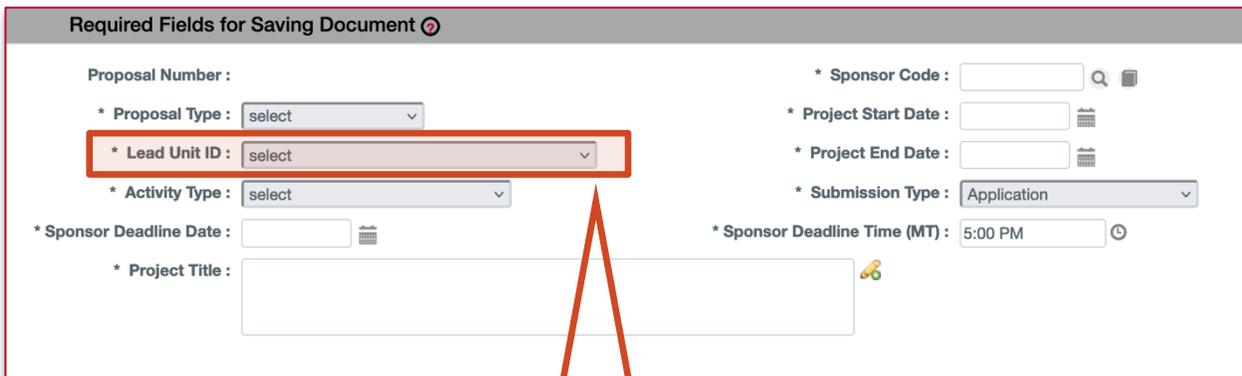
Solicited Proposal Submission Steps

1. Request support from a Faculty Research Support Officer (FRSO)

- If you would like help with the proposal development process, reach out early to your FRSO by visiting <https://frdo.unm.edu> and clicking **Request Support**
- In most colleges and schools this is optional, but encouraged; Faculty in the College of Education and Human Sciences are **required** to initiate proposals with an FRSO.

2. Initiate a Streamlyne Proposal Development (PD) record

- Log into [Streamlyne](#). Select **Main Menu > Pre-Award > Proposal Development > Create new > Template**. Click **All Proposals**.
- Complete the “Required Fields for Saving Document” and **Save**.



Required Fields for Saving Document

Proposal Number : _____

* Proposal Type : select

* Lead Unit ID : select

* Activity Type : select

* Sponsor Deadline Date : _____

* Project Title : _____

* Sponsor Code : _____

* Project Start Date : _____

* Project End Date : _____

* Submission Type : Application

* Sponsor Deadline Time (MT) : 5:00 PM

NOTE: The *Lead Unit ID* CANNOT be changed once selected and saved. All other fields can be modified until the record is routed to OSP for review.

- Retrieve the **Proposal Number**, generated upon saving. This is needed to make your OSP review appointment.

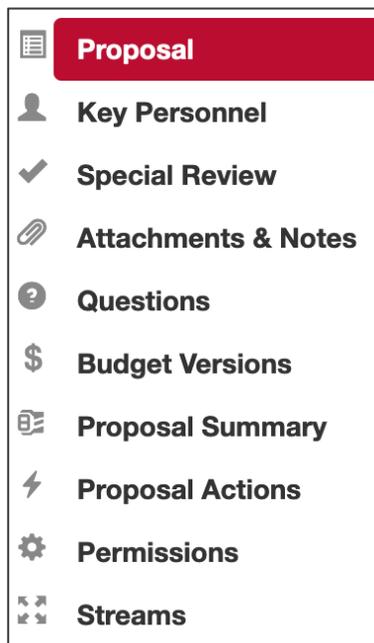
3. Make a proposal review appointment with the Office of Sponsored Projects (OSP)

- As soon as you have a Streamlyne Proposal Number, go to <https://ospappointment.unm.edu/schedule> and click **Schedule Review**
- Select your sponsor from the list. If they are not listed, [complete this form](#) to have them added to UNM’s system(s).
- Select your proposal deadline to see appointments available before then. It is a best practice to schedule your review 2-days before the sponsor’s deadline.
- Note: Appointments should be made as early as possible to ensure availability; Proposals must be in complete and final form and routed to OSP before the OSP appointment begins. The proposal will be submitted to the sponsor by the end of the appointment; The PI and/or a designated representative must be available to respond immediately (via email or phone) to the reviewer’s questions and/or*

instructions during the review appointment. The PI will be required to log into Streamlyne or submission portals during the appointment.

4. Develop proposal and complete Streamlyne record.

- a. **Review the sponsor solicitation** carefully to determine proposal requirements. Pay special attention to the following, as answering “yes” to any questions below will increase the amount of time needed to develop the proposal:
 - i. Does the solicitation require cost-sharing?
 - ii. Is the program subject to Executive Order 12372 (intergovernmental review)?
 - iii. Will the proposal require any letters of support?
- b. Complete your **Streamlyne proposal record**.



- i. **Proposal tab:** Fill out all fields with an asterisk *
- ii. **Key Personnel tab:** After adding all Key Personnel¹, each PI and Co-PI must complete the **Proposal Person Certification** before the OSP appointment (the fourth option down when you click on your name).
- iii. **Special Review tab:** Indicate whether your proposed project includes human/animal subjects or has other cybersecurity requirements.
- iv. **Questions tab:** Be sure to respond to all the questions in the proposal questions, Research IT & Cybersecurity, Export Control Screening, and Research Safety and Compliance sub-tabs.
- v. **Attachments and Notes tab:** Be sure to upload the required internal attachments: the solicitation, budget², *matching* budget justification, and statement of work (project narrative) plus any applicable forms, including, but not limited to cost share spending, reps/certs, off-campus rate determination, contracts, F&A exceptions, PI-eligibility exceptions, and [subaward documents](#).
- vi. **Budget Versions:** In the budget summary, fill out the **Direct Costs, F&A Cost, and Cost Sharing** (if applicable), then click **Calculate all Periods**. When done, check the box marked **Final** and then select **Complete** from the dropdown.
- vii. **IMPORTANT:** Each Key Person listed in the Key Personnel tab will need to [complete a project specific COI disclosure](#) in SL before the OSP appointment.

¹ Key personnel should include the UNM PI, Co-PIs and other key persons (per sponsor definition); Other UNM personnel and consultants identified by the PI as being able to affect the design, conduct, or reporting of research; HSC Personnel who are named as Co-PIs and/or Key Personnel on a UNM project that is being submitted through the Main/Branch Campus Office of Sponsored Projects.

² Budget must use UNM’s budget template and must include at least 1% effort for PI and Co-PIs in nearly all cases. Cost-sharing, subawards, F&A rate exceptions, fabricated equipment, and other more complex budget can require additional time in the proposal development process.

5. Complete the proposal application in the sponsor submission portal or otherwise as instructed in the solicitation.

- a. Ensure you have access to the sponsor portal that will be used for proposal submission, if applicable. The Office of Sponsored Projects (OSP) helps to manage UNM's accounts and roles for these systems: <https://osp.unm.edu/systems/sponsor-portal-rundown.html>.
- b. For federal proposals submitted by UNM PIs: **NIH ASSIST** can be used for NIH proposals [[help resources](#)]; **Research.gov** must be used to prepare/submit NSF proposals [[help resources](#)]; **Workspace** must be used to submit all other Grants.gov proposals (unless otherwise noted in the solicitation) [[help resources](#)].
 - i. In each of these federal sponsor portals (and in some other portals) you can **run a validation check** to ensure a complete proposal with no errors. If applicable, this should be done, and errors corrected, before giving access to the AOR.

6. Provide Authorized Organizational Representative (AOR)³ access to completed sponsor portal (if applicable) and route Streamlyne record to OSP BEFORE your OSP review appointment.

- a. For sponsor portals that require AOR submission, **the AOR must be given access** to the proposal.
 - i. For **NIH ASSIST**: Click Update Submission Status button; Select Ready for Submission from dropdown box in popup window; Click Continue without adding comment. [[NIH video instructions](#)]
 - ii. For **Research.gov**: Click **Share Proposal with SPO/AOR**; Click *Change proposal access*; Correct any noted errors in the *Submission Errors and Warnings* box; Select *Edit Access* radio button; Check *Allow Proposal Submission (AOR only)* box; Click *Save proposal access* button. [[NSF instructions](#)]
 - iii. For **Workspace**: Click **Complete and Notify AOR** button under the *forms* tab in *Workspace Actions* box. [[Grants.gov Instructions](#)]
- b. When the AOR is not required to submit the final proposal (e.g. some email submissions or portals requiring PI submission), it is a best practice to upload a PDF printout of the final proposal to the Streamlyne record before the OSP review appointment.
- c. In Streamlyne, from the **Proposal Actions** tab, **run data validations**. Correct any errors, then submit your Streamlyne proposal to OSP via **Route for Review** button *before* the scheduled appointment.
 - i. Note: You will no longer be able to edit your record once routed, so this should be the last thing you do before your appointment.

7. You will receive an email from OSP at the start of your scheduled review appointment letting you know they are starting their review. The PI and/or designated representative should be available by email and phone to answer any questions from the OSP reviewer for the duration of the appointment.

³ In UNM's case, our AOR is the Office of Sponsored Programs (OSP)