Attaching Documents

Module 9

Research Suite Product Support

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cayuse 424

Electronic Proposal
Development and Submission

Objectives

In this module you will learn how to:

- Attach documents to your grant proposal

- Follow Grants.gov and NIH attachment guidelines

- Attach your Research Plan using the "Exploder"

- Attach Letters of Support

- View proposal forms and attachments in PDF format

Commonly Required Attachments

- PHS 398 attachments for NIH and other PHS agencies only

| Form Set	Attachment
SF424 RR, page 2	• Pre-application • SFLL • Other Explanatory Documentation
SF424 RR, Other Project Information	• Project Summary/Abstract • Project Narrative • Bibliography and References Cited • Facilities and Other Resources • Equipment • Other
SF424 RR, Key Persons	• Biographical Sketch • Current and Pending Support
SF424 RR Budget, page 3	• Budget Justification
Modular Budget	• Personnel Justification • Consortium Justification • Additional Narrative Justification
PHS 398 Research Plan	• Research Plan

1. Locate the appropriate page of the form you need to attach the document to.

2. Locate the attachment

    point by the label.

    Current & Pending Support

    is shown below.
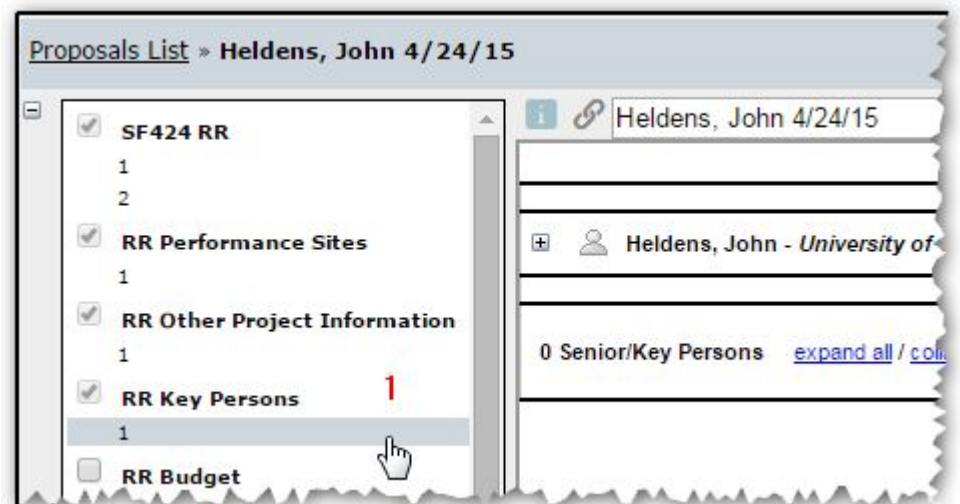
1. Click **Add Attachment**.
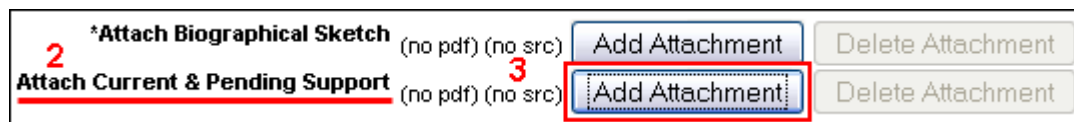
Attaching Documents

4. In the **Upload Attachment** popup, click **Browse** next to the **PDF file** slot.

5. Select the PDF file in the file browser and click **Open**.

   - The PDF file is the file that will be submitted to Grants.gov.

   - If your Opportunity requires a non-PDF file be submitted, please contact your local administrator.

6. If desired, do the same for the Source file (e.g. Word format).

   - This is not required and will not be submitted, but makes it easy to change the file if modifications are needed.

Attaching Documents

7. Once you've added the desired file(s), click **Upload**.

8. The files have been uploaded when **PDF** (and **SRC** if you included a source file) are blue links.

PDF Attachment Guidelines

Grants.gov and NIH both maintain guidelines on successfully submitting PDF attachments.

- Convert 'active' form field PDFs to 'flat' (static) PDFs using a PDF converter, unless instructions in the attachment form state otherwise. Some attachment points require fillable (active) PDFs.

- Names should be less than 50 characters.
  - The real limit is 36 characters because the file will be appended.

- Create PDFs using creation software, not by scanning a printed document.

- Disable any security features in the document.

- Do not include stamps or annotations.

- Make sure your page size is 8.5" x 11" letter (do not use A4).

These guidelines apply to most opportunities, but always verify your FOA instructions if you have any questions.
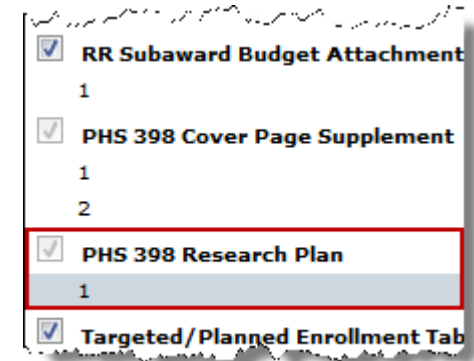
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Attaching the Research Plan

The Research Plan can be attached manually using the previous steps, but Cayuse 424 also allows you to upload just one document and get all your attachments in the right place!

1. Create a properly formatted Research Plan.

   - See the SF 424 R&R Application Guide for NIH for details.

2. Insert a page break at each section header (e.g. Introduction, Specific Aims).

3. Create a PDF of your Research Plan file using the PDF creation software of your choice.

4. Navigate to the PHS 398 Research Plan form of your proposal.

5. Upload your Research Plan PDF file to the **0. Composite PDF** slot.

5. You should see that the division of the file has been successful.

6. Your attachment points will have PDF attachments associated with them.

Breaking apart the research plan succeeded:

Bookmarks Added to PDF:

Introduction to Research Plan
Specific Aims
Research Strategy
Progress Report Publication List
Protection of Human Subjects
Inclusion of Women and Minorities
Inclusion of Children
Vertebrate Animals
Select Agent Research
Multiple PD/PI Leadership Plan
Consortium/Contractual Arrangements
Resource Sharing Plan(s)

The following recognized bookmarks were found and used to create the associated research plan sections:

Pg	Title
1	Introduction to Research Plan
2	Specific Aims
3	Research Strategy
4	Progress Report Publication List
5	Protection of Human Subjects
6	Inclusion of Women and Minorities
7	Inclusion of Children
8	Vertebrate Animals
9	Select Agent Research
10	Multiple PD/PI Leadership Plan
11	Consortium/Contractual Arrangements
12	Resource Sharing Plan(s)

Attaching Letters of Support

- Cayuse 424 offers an Append function to put several letters of support together without bundling.
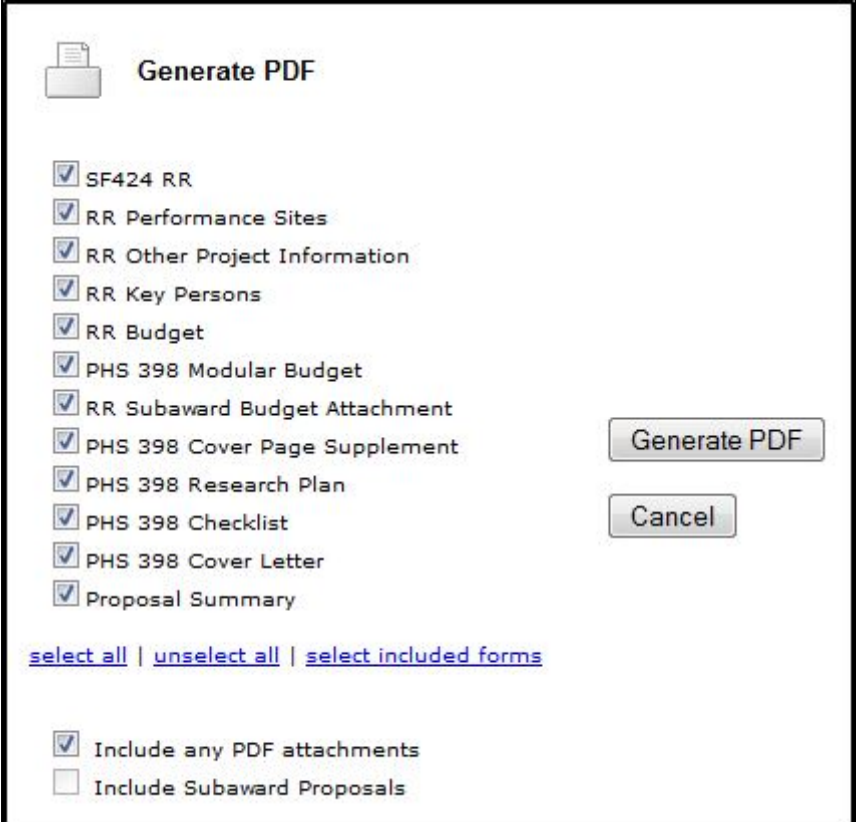

- Use the **Add** button to add the first letter.

- For subsequent letters, use the **Append** button.
  - A source file cannot be added for additional letters.

- Selecting **Delete** will delete all items.

Viewing Proposals in PDF Format

You can generate a PDF to see how your proposal looks at any time.

1. Click the printer icon 🖨 at the top right.

2. Check any form you want to print. You can select as many or as few forms as you need.

3. If you want to see the attachments to the form as well, check **Include any attachments**.

4. Click **Generate PDF**. Save or print the generated file.

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Conclusion

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- Attach Letters of Support

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