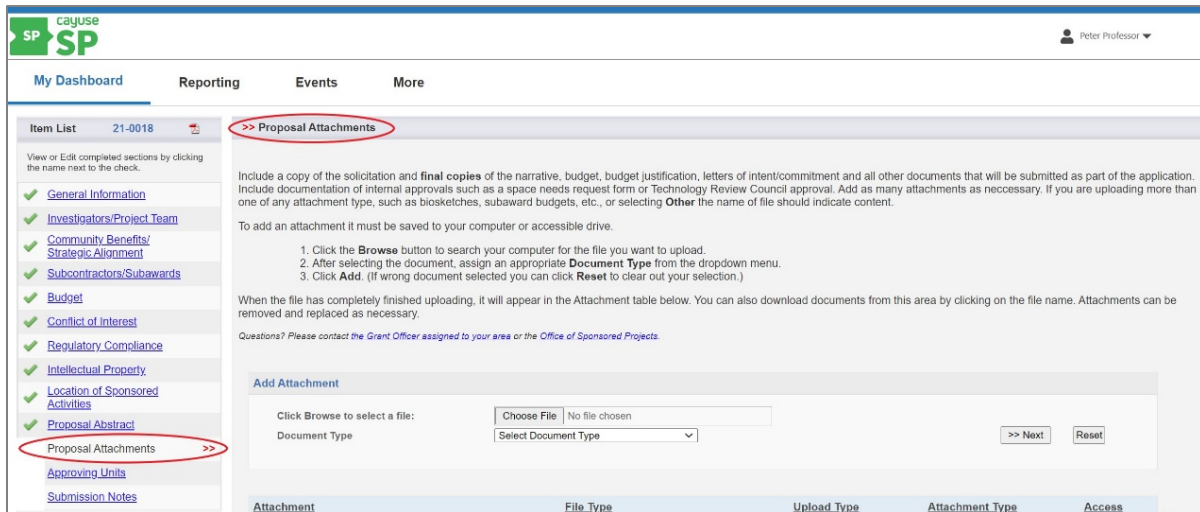


## Proposal Attachments

### General Overview

The **Proposal Attachments** section is the location where all documents related to the sponsored projects proposal are saved.

A copy of the funding opportunity/sponsor solicitation, final copies of the narrative, budget, budget justification, letters of commitment, letter of intent, all other documents submitted to the sponsor as part of the application, and internal documents, such as Co-Principal Investigator Assurance Statements, space needs request forms, technology review approvals, HR new position documents, and IRB decisions, are uploaded to the Proposal Attachments section.



In general, all proposal documents uploaded and stored in Cayuse SP can be accessed and viewed by members of a project team (staff and faculty), internal approvers at the College, and OSP, as well as other individuals who have been granted access to the project.

### When to Upload Attachments

The first document typically uploaded to this section is the sponsor solicitation/notice of funding opportunity. All other documents uploaded to this section should only be uploaded when they are fully developed and in their final or “near final” draft format.

Some documents will be uploaded prior to the Cayuse SP Proposal being submitted for internal review and approvals. Other documents will be uploaded prior to submitting the completed application to the sponsor or after the application is submitted to the sponsor.

## Required Attachments

Documents required in the Proposal Attachments section depend on the proposal. At a minimum, required attachments include:

- Funding opportunity/sponsor solicitation
- Proposal Narrative
- OSP Budget Template
- Budget Justification/Narrative
- Final application submitted to sponsor

### **Other Required Documents, when applicable, include:**

- Co-Principal Investigator Assurance Statement
- HR new position description and HR classification.
- Facilities Space Needs Request and approvals.
- Technology approvals.
- IRB application, decisions and approvals.
- Subaward Budget Justification and Budget Spreadsheet
- Sponsor guidelines for IDC (necessary if a rate other than the College's approved F&A rate is proposed).
  - For example, if the sponsor does not allow IDC, a letter or statement from the Sponsor should be attached to the proposal with the specific text highlighted for easy reference. When F&A rates are delineated in the solicitation, the section of the solicitation should be highlighted and uploaded as a proposal attachment. The document name should indicate that the document is support for the IDC deviation (Sponsor IDC Guidelines.pdf) even if the solicitation is already attached to fulfill the solicitation attachment requirement.

While this list is not exhaustive, it provides a minimal overview of documents that may be required in the Proposal Attachment section. Your assigned OSP Grant Officer will work with you to manage the Proposal Attachments section.

### **Number of Attachments Allowed**

Add as many attachments as necessary.

## Document Naming

Documents that will be uploaded to the Proposal Attachment section must first be saved to your computer or accessible drive and named according to the document type and content.

For example:

- PDF document of the solicitation from the sponsor would be saved as the following:
  - abbreviated sponsor name-solicitation number-short name-the word "solicitation"
  - NSF-20579-DISES-Solicitation.pdf

- Word document of the Project Narrative would be saved as the following:
  - sponsor-short name-the word “project narrative”
  - NSF-DISES-Project Narrative.docx
- Excel spreadsheet of the Budget should be saved as the following:
  - sponsor-short name-the word “budget”
  - NSF-DISES-Budget.xlsx

If you are uploading more than one of the same type of attachment, such as bio-sketches/CV, Co-Principal Investigator Assurance Statements, Letters of Support, etc., ensure that the name of the person or organization is included in the file name.

For example:

- NSF-DESI-Biosketch-Peter Professor.pdf
- NSF-DESI-Letter of Support-Research Technology Inc.pdf

If you are selecting “Other” in the attachment dropdown menu, the name of the file should indicate the content.

For example:

- NSF-DESI-Logic Model.pdf
- NSF-DESI-Indirect Cost Rate.pdf

### **Naming Convention for Subcontractors/Subawards**

The naming convention for each organization listed in the subcontractors/subawards section of the proposal is slightly different. Save and upload the following document names as follows:

- (Name of subrecipient) Statement of Work
- (Name of subrecipient) Budget
- (Name of subrecipient) Budget Justification *if not within budget above*
- (Name of subrecipient) Subaward Letter of Commitment (signed copy)
- (Name of subrecipient) Indirect Cost Rate (as applicable) – upload as Other File Type
- (Name of subrecipient) Representation/Certification

For proposals that include third-party cost share, attach supporting documentation detailing the type of cost sharing and detailed parameters of the agreement. These documents may include, but are not limited to, the following:

- (Name of third party) Memo of Understanding (MOU) – upload as Other
- (Name of third party) Letter of Commitment
- (Name of third party) Cost Share Agreement

## **Add Attachments**

To add an attachment, follow these steps:

1. Click the **Choose File** button to search your computer for the file you want to upload.

The screenshot shows the 'Add Attachment' form. At the top, it says 'Click Browse to select a file:'. To the right of this text is a button labeled 'Choose File' which is highlighted with a red rectangular box. Further right is a text field containing 'No file chosen'. Below this is a 'Document Type' dropdown menu with the text 'Select Document Type' and a downward arrow. To the right of the dropdown are two buttons: 'Add' and 'Reset'. Below the form area, the text 'No attachments have been added.' is displayed. At the bottom center is a button labeled 'No Attachments'. In the bottom right corner, there is a blue circle with the number '1' and an orange circle with a white question mark.

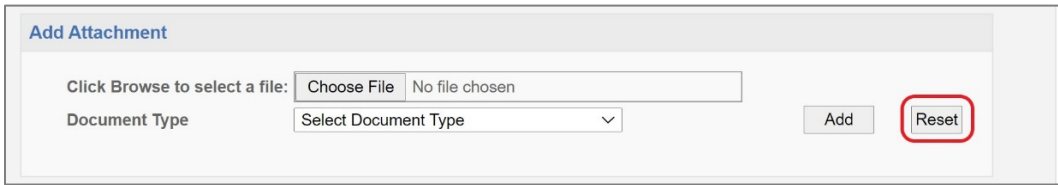
2. After choosing the document to upload, assign an appropriate **Document Type** from the dropdown menu.

The screenshot shows the 'Add Attachment' form. The 'Choose File' button is now disabled and greyed out. The text field to its right now contains the filename 'SLCO-ZAP 2020 Tier II-Solicitation.pdf'. The 'Document Type' dropdown menu is highlighted with a red rectangular box and shows a downward arrow. The 'Add' and 'Reset' buttons are still present. Below the form area, the text 'No attachments have been added.' is displayed. At the bottom center is a button labeled 'No Attachments'. In the bottom right corner, there is a blue circle with the number '1' and an orange circle with a white question mark.

3. After assigning the appropriate document type, click **Add**.

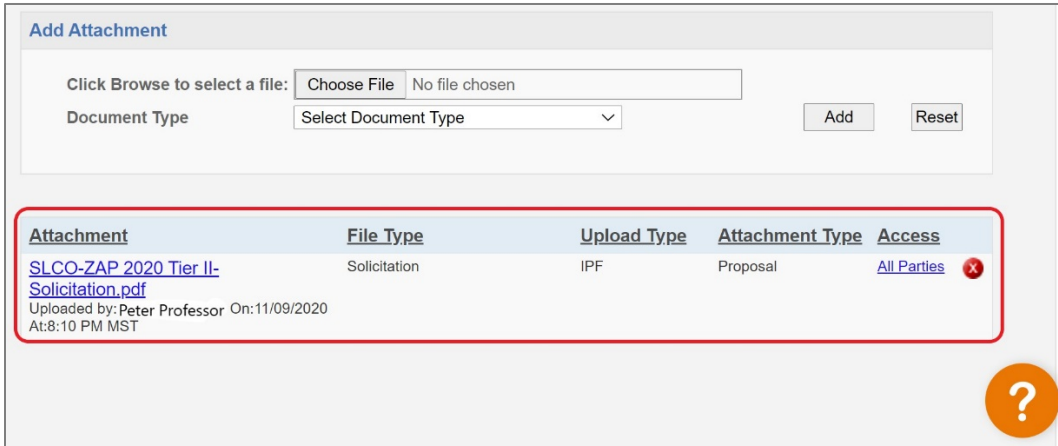
The screenshot shows the 'Add Attachment' form. The 'Document Type' dropdown menu now displays the selected option 'Solicitation'. The 'Add' button is highlighted with a red rectangular box. The 'Reset' button is still present. Below the form area, the text 'No attachments have been added.' is displayed. At the bottom center is a button labeled 'No Attachments'. In the bottom right corner, there is an orange circle with a white question mark.

If the wrong document type is selected, click **Reset** to clear out your selection.




The screenshot shows the 'Add Attachment' form. At the top, there is a text input field with the placeholder 'Click Browse to select a file:' and a 'Choose File' button. To the right of the input field is the text 'No file chosen'. Below this is a 'Document Type' dropdown menu with the text 'Select Document Type'. To the right of the dropdown are two buttons: 'Add' and 'Reset'. The 'Reset' button is highlighted with a red circle.

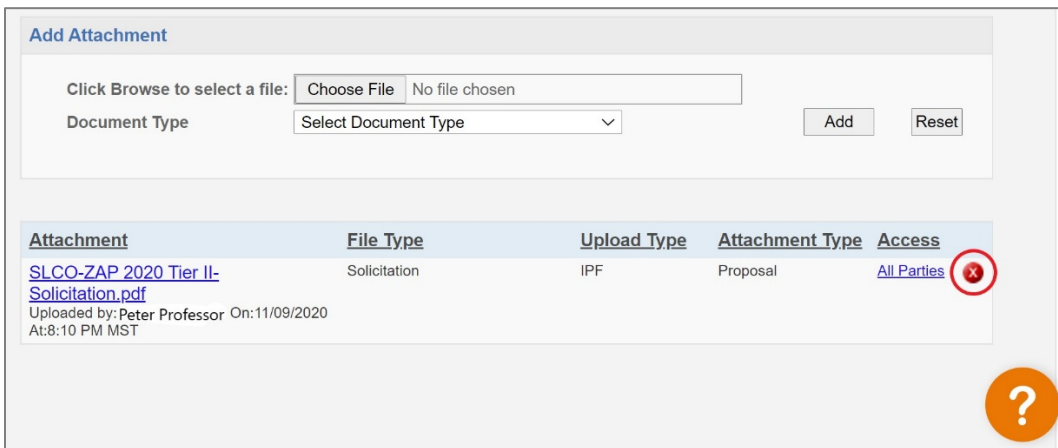
4. When the file has finished uploading, it will appear in the Attachment table.



The screenshot shows the 'Add Attachment' form with an attached table below it. The table has the following columns: Attachment, File Type, Upload Type, Attachment Type, and Access. The first row contains the following data: Attachment: [SLCO-ZAP 2020 Tier II- Solicitation.pdf](#), File Type: Solicitation, Upload Type: IPF, Attachment Type: Proposal, Access: [All Parties](#) with a red 'X' icon to its right. Below the table, there is a red question mark icon in a circle.

Attachment	File Type	Upload Type	Attachment Type	Access
<a href="#">SLCO-ZAP 2020 Tier II- Solicitation.pdf</a> Uploaded by: Peter Professor On: 11/09/2020 At: 8:10 PM MST	Solicitation	IPF	Proposal	<a href="#">All Parties</a> 

5. Attachments can be removed and replaced as necessary by clicking the delete record button (red encircled X symbol) to the right of the attachment.



The screenshot shows the 'Add Attachment' form with the attached table from the previous screenshot. The 'Access' column for the first row now has a red circle around the 'All Parties' link and the red 'X' icon. Below the table, there is a red question mark icon in a circle.

6. Access to uploaded documents will default to *All Parties*. If the document contains proprietary or sensitive information, the access to the document can be changed by the person who uploaded the file.

To reassign or limit access to certain individuals or groups, click **All Parties**.

**Add Attachment**

Click Browse to select a file:  No file chosen

Document Type:

Attachment	File Type	Upload Type	Attachment Type	Access
<a href="#">SLCO-ZAP 2020 Tier II- Solicitation.pdf</a> Uploaded by: Peter Professor On:11/09/2020 At:8:10 PM MST	Solicitation	IPF	Proposal	<a href="#">All Parties</a>

Select the individuals or groups to assign access from the pop-up window and click **Update**.

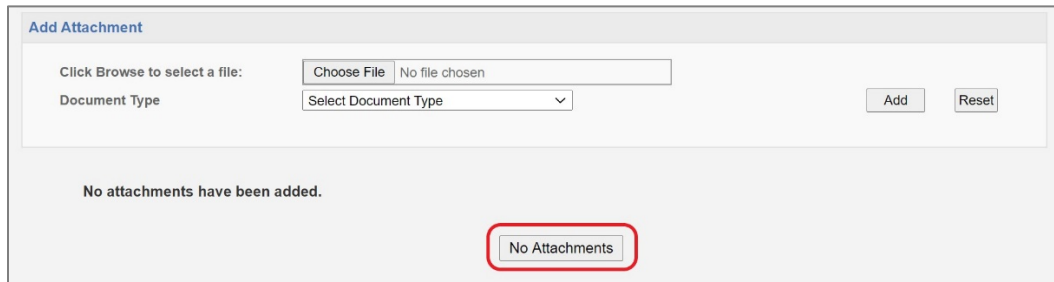
Assign Access

- Admin Office
- IPF Creator
- Lead PI Only
- Certifying Investigator
- Research Team
- All Parties
- Unit Approvers and Administrators

7. Documents saved to the Attachment section can be downloaded by clicking on the file name.

Attachment	File Type	Upload Type	Attachment Type	Access
<a href="#">SLCO-ZAP 2020 Tier II- Solicitation.pdf</a> Uploaded by: Peter Professor On:11/09/2020 At:8:10 PM MST	Solicitation	IPF	Proposal	<a href="#">All Parties</a>

8. In the highly unusual case that attachments are not applicable, click **No Attachments** to complete this page.



The screenshot shows a web form titled "Add Attachment". At the top, there is a header "Add Attachment". Below it, there is a section with the text "Click Browse to select a file:" followed by a "Choose File" button and a text input field containing "No file chosen". To the left of this is the label "Document Type" and a dropdown menu with "Select Document Type" and a downward arrow. To the right of the dropdown are two buttons: "Add" and "Reset". Below this section, the text "No attachments have been added." is displayed. At the bottom center, there is a button labeled "No Attachments" which is highlighted with a red rectangular box.

## Next Step

Navigating and completing the **Approving Units** section.

For more information, see [Cayuse SP - User Guide: Approving Units.](#)