

Attaching Documents

Module 7

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	<ul style="list-style-type: none">• Pre-application• List of Project Congressional Districts• Cover Letter
SF424 RR, Other Project Information	<ul style="list-style-type: none">• Project Summary/Abstract• Project Narrative• Bibliography and References Cited• Facilities and Other Resources• Equipment• Other
SF424 RR, Key Persons	<ul style="list-style-type: none">• Biographical Sketch• Current and Pending Support
SF424 RR Budget, page 3	<ul style="list-style-type: none">• Budget Justification
Modular Budget	<ul style="list-style-type: none">• Budget Justification
PHS 398 Research Plan	<ul style="list-style-type: none">• Research Plan

Attaching Documents

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.
3. Click **Add Attachment**.

2	*Attach Biographical Sketch	(no pdf) (no src)	Add Attachment	Delete Attachment
	<u>Attach Current & Pending Support</u>	(no pdf) (no src) 3	Add Attachment	Delete 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**.

4

Upload attachment

Name: KeyPersonSupport

PDF file:

Source of PDF: (optional)

5

- PDF is required and will be submitted to Grants.gov.
- Cayuse S2S cannot submit non-PDF files.

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

- Source file is not required, 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**.



Upload attachment

After uploading, please view the uploaded attachment to verify its correctness.

Name:	<input type="text" value="Budget Justification Su"/>
PDF file:	<input type="button" value="Browse..."/> Budget Justification Sub.pdf
Source of PDF: (optional)	<input type="button" value="Browse..."/> Budget Justification.docx
	<input type="button" value="Upload"/> <input type="button" value="Cancel"/>

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

K. * Budget Justification (Only attach one file.)	Budget Justification Sub pdf src	<input type="button" value="Add Attachment"/>	<input type="button" value="Delete Attachment"/>
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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.
- Names should be less than 50 characters.
- 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.

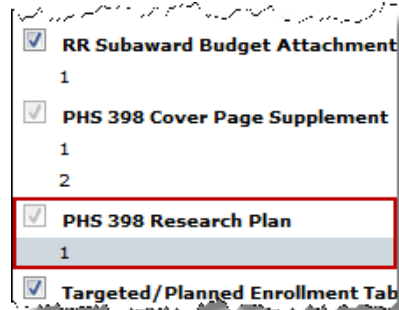
Attaching the Research Plan

The Research Plan can be attached manually using the previous steps, but Cayuse S2S 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.

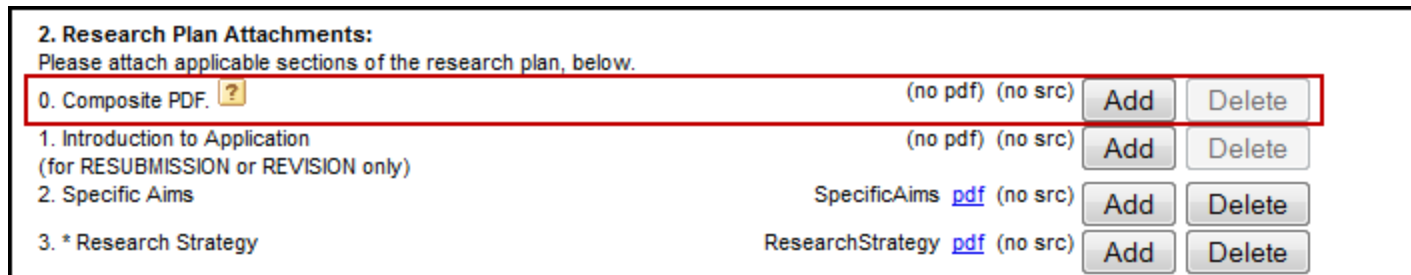
Using the “Exploder”

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



A screenshot of a web interface showing a list of document sections. Each item has a checked checkbox, a title, and a number. The items are: 'RR Subaward Budget Attachment' (1), 'PHS 398 Cover Page Supplement' (1, 2), 'PHS 398 Research Plan' (1), and 'Targeted/Planned Enrollment Tab'. The 'PHS 398 Research Plan' item is highlighted with a red border.

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



A screenshot of a web form titled '2. Research Plan Attachments:'. Below the title is the instruction 'Please attach applicable sections of the research plan, below.' The form contains a table of attachments. The first row, '0. Composite PDF. ?' (no pdf) (no src), is highlighted with a red border. The other rows are '1. Introduction to Application (for RESUBMISSION or REVISION only)' (no pdf) (no src), '2. Specific Aims' (SpecificAims pdf) (no src), and '3. * Research Strategy' (ResearchStrategy pdf) (no src). Each row has 'Add' and 'Delete' buttons.

2. Research Plan Attachments:	
Please attach applicable sections of the research plan, below.	
0. Composite PDF. ?	(no pdf) (no src) [Add] [Delete]
1. Introduction to Application (for RESUBMISSION or REVISION only)	(no pdf) (no src) [Add] [Delete]
2. Specific Aims	SpecificAims pdf (no src) [Add] [Delete]
3. * Research Strategy	ResearchStrategy pdf (no src) [Add] [Delete]

Using the “Exploder”

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:

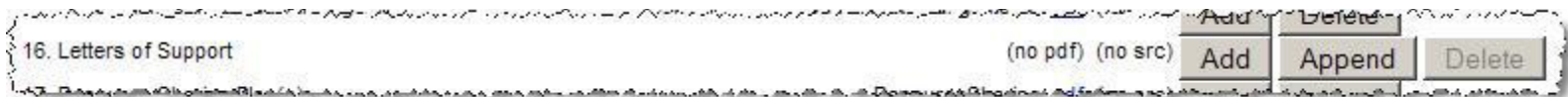
Specific Aims
Research Strategy
Progress Report Publication List
Protection of Human Subjects
Inclusion of Women and Minorities
Inclusion of Children
Vertebrate Animals
Select Agent Research
Multiple PD/PI Leadership Plan
Consortium/Contractual Arrangements
Resource Sharing Plan(s)
Bibliography & References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

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

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

Attaching Letters of Support

- Cayuse S2S offers an Append function to put several letters of support together without bundling.

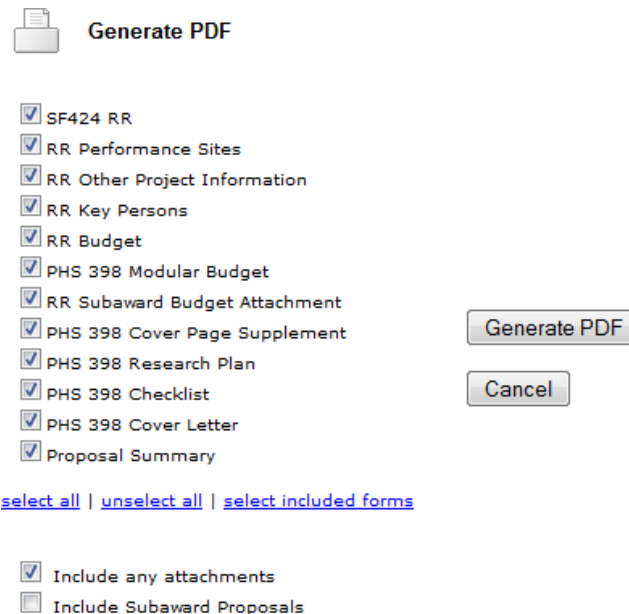


- Use the **Add** button to add the first letter.
- For subsequent letters, use the **Append** button.
 - A source file cannot be added for additional letters.
- Selecting **Delete** will delete all items.

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.



The image shows a web interface for generating a PDF. At the top, there is a printer icon and the text "Generate PDF". Below this is a list of forms with checkboxes, all of which are checked. The forms are: SF424 RR, RR Performance Sites, RR Other Project Information, RR Key Persons, RR Budget, PHS 398 Modular Budget, RR Subaward Budget Attachment, PHS 398 Cover Page Supplement, PHS 398 Research Plan, PHS 398 Checklist, PHS 398 Cover Letter, and Proposal Summary. To the right of the list are two buttons: "Generate PDF" and "Cancel". Below the list of forms are three links: "select all", "unselect all", and "select included forms". At the bottom, there are two more checkboxes: "Include any attachments" (checked) and "Include Subaward Proposals" (unchecked).

Generate PDF

- ☒ SF424 RR
- ☒ RR Performance Sites
- ☒ RR Other Project Information
- ☒ RR Key Persons
- ☒ RR Budget
- ☒ PHS 398 Modular Budget
- ☒ RR Subaward Budget Attachment
- ☒ PHS 398 Cover Page Supplement
- ☒ PHS 398 Research Plan
- ☒ PHS 398 Checklist
- ☒ PHS 398 Cover Letter
- ☒ Proposal Summary

[select all](#) | [unselect all](#) | [select included forms](#)

☒ Include any attachments
☐ Include Subaward Proposals

Generate PDF
Cancel