Module 8

Attaching Documents

Objectives

❑ In this module you will learn how to:

❑ Attach documents to your grant proposal

❑ Attach your Research Plan

❑ Use the Research Plan "Exploder" in 5 easy steps

❑ View proposals in PDF format

Attachment Checklist

☐ All **required** attachments, per the FOA, should be un-encrypted PDFs

Form Set	Attachment
SF424 RR, page 2	• Pre-application • List of Project Congressional Districts
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 Justifications
Modular Budget	• Budget Justifications
PHS 398 Research Plan	• Research Plan
PHS 398 Checklist	• Assurances/Certifications
PHS 398 Cover Letter	• Cover Letter

Sample for NIH and other PHS Agencies.

Attaching Documents

1. Go to the appropriate page on the form set (e.g. Key Persons page)

2. Locate attachment point (e.g. Current and Pending Support)

3. Click **Add Attachment**

Attaching Documents

4. The **Upload Attachment** window enables you to attach the PDF and the source (Word) files

- ❑ It is a good practice to upload both versions. Should the document require editing at a later time the source file is easily found by anyone working on the proposal

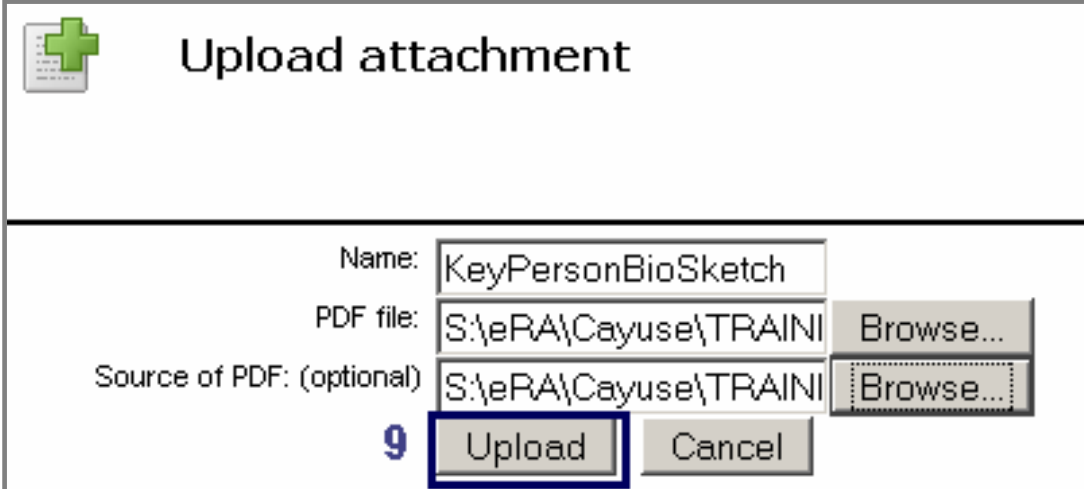5. Click **Browse**

Attaching Documents

6. Locate the PDF version of the file you wish to attach

7. Click **Open**

8. Repeat for source file (optional)
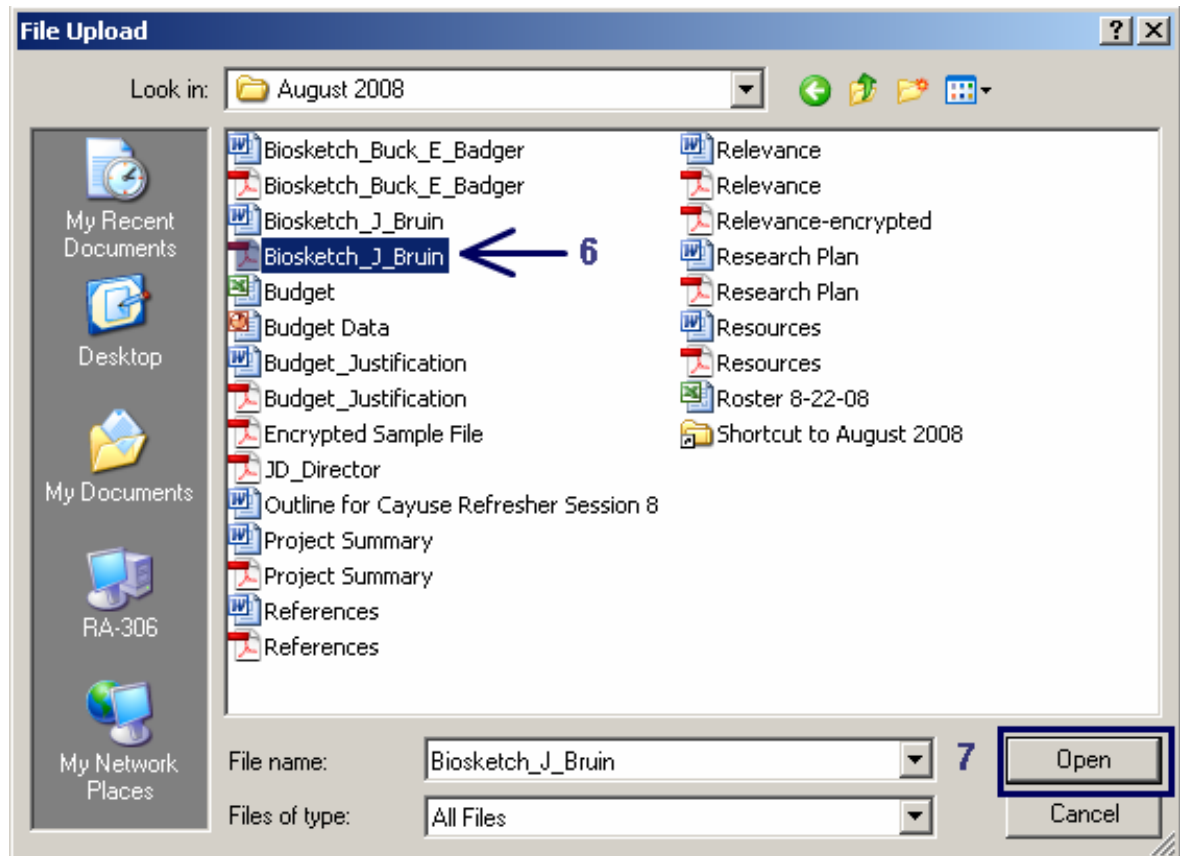
Attaching Documents

9. Once you've added both files, click **Upload**

Attaching Documents

10. The files have been uploaded when you see **PDF** and **SRC** in blue

Attaching the Research Plan

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- ❑ To attach your Research Plan manually please follow the 10 steps in the previous slides

- ❑ To attach your Research Plan for NIH and other PHS agencies "all at once" you can use the "**Exploder**" process (described in the next several slides)
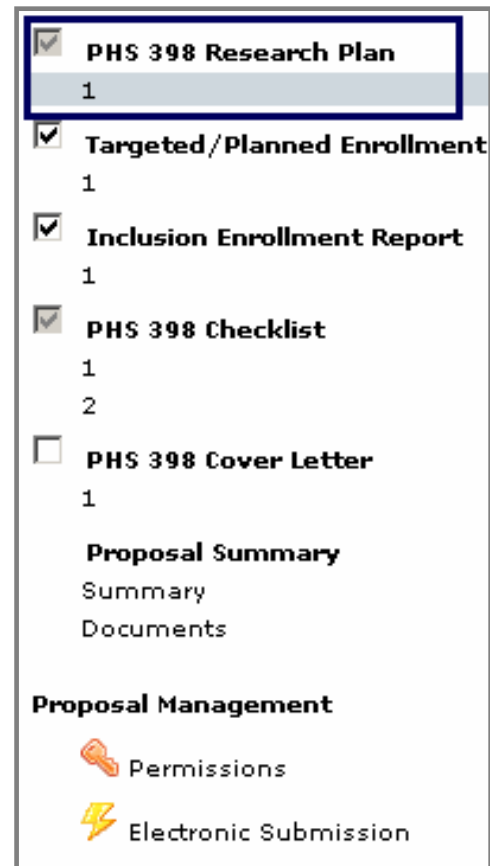
Using the "Exploder"

IMPORTANT NOTE: Slides 10 – 14 apply only to submissions to PHS agencies.

1. Take a properly formatted (see the ***SF424 (R&R) Application Guide for NIH and Other PHS Agencies*** for details) Research Plan and insert a page break at each section header (e.g. Introduction, Specific Aims, Background & Significance, etc)

2. Create a PDF of the Research Plan using a PDF generator of your choice (e.g. Acrobat, Word 2007, Word OS X, Cute PDF, etc)

Using the "Exploder"

3. Login to 2S2 Grants, open your proposal and navigate to the PHS 398 Research Plan section

Using the "Exploder"

4. Upload your Research Plan PDF to "0. Composite PDF"

Using the "Exploder"

5. Success!

   Breaking apart the Research Plan succeeded!

Results:

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

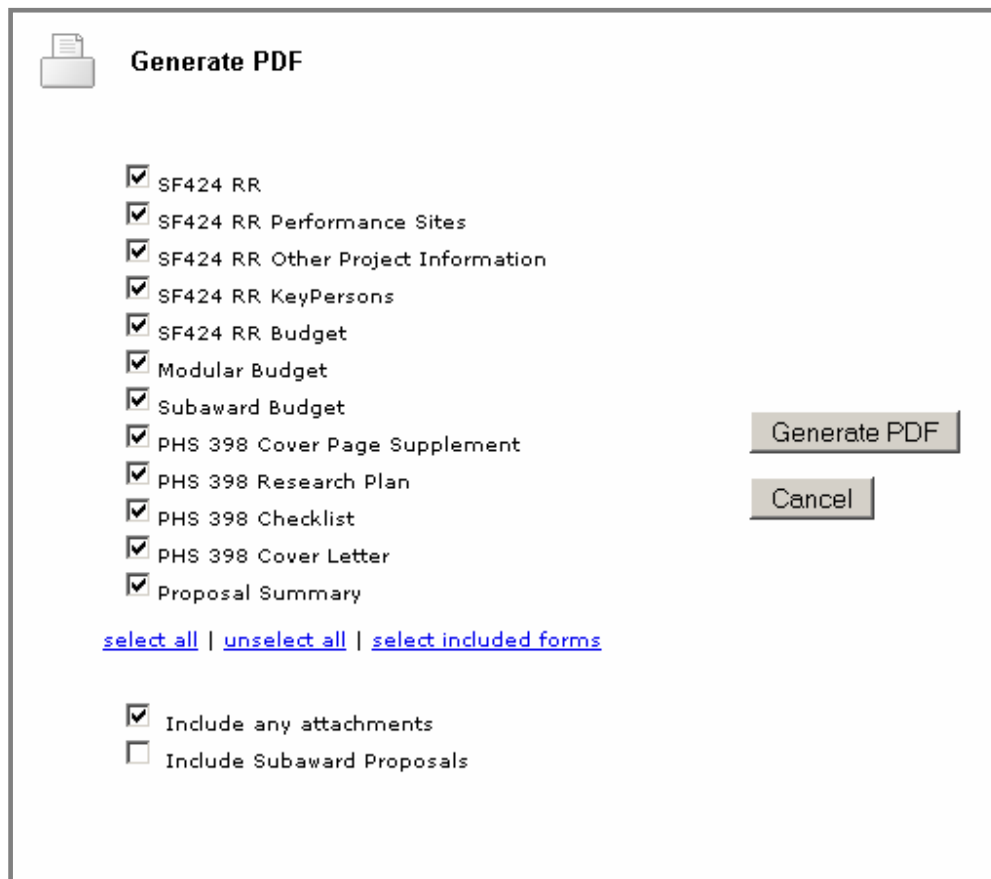| Pg	Title
1	Specific Aims
2	Background and Significance
3	Preliminary Studies
4	Research Design and Methods
5	Progress Report Publication List
6	Vertebrate Animals
7	Select Agent Research
8	Multiple PI Leadership Plan
9	Consortium/Contractual Arrangements
10	Resource Sharing Plan(s)
11	Bibliography & References Cited

Ok

Viewing Proposals in PDF Format

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

Click Print icon [🖨] at the top right hand side of the proposal

1. Check all appropriate sections. You can select as many or as few sections as desired

2. Click **Generate PDF**

- ◘ Cayuse424 will generate a PDF of all selected sections
- ◘ Save or print the generated PDF version

Generate PDF

☑ SF424 RR
☑ SF424 RR Performance Sites
☑ SF424 RR Other Project Information
☑ SF424 RR KeyPersons
☑ SF424 RR Budget
☑ Modular Budget
☑ Subaward Budget
☑ 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

Conclusion

❑ In this module you have learned how to:

    ❑ Attach documents to your grant proposal

    ❑ Attach your Research Plan

    ❑ Use the Research Plan "Exploder" in 5 easy steps

    ❑ View proposals in PDF format