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Module 7

Attaching Documents



Objectives

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- 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

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

Form Set	Attachment
SF424 RR, page 2	<ul style="list-style-type: none">• Pre-application• List of Project Congressional Districts
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 Justifications
Modular Budget	<ul style="list-style-type: none">• Budget Justifications
PHS 398 Research Plan	<ul style="list-style-type: none">• Research Plan
PHS 398 Checklist	<ul style="list-style-type: none">• Assurances/Certifications
PHS 398 Cover Letter	<ul style="list-style-type: none">• Cover Letter

Attaching Documents

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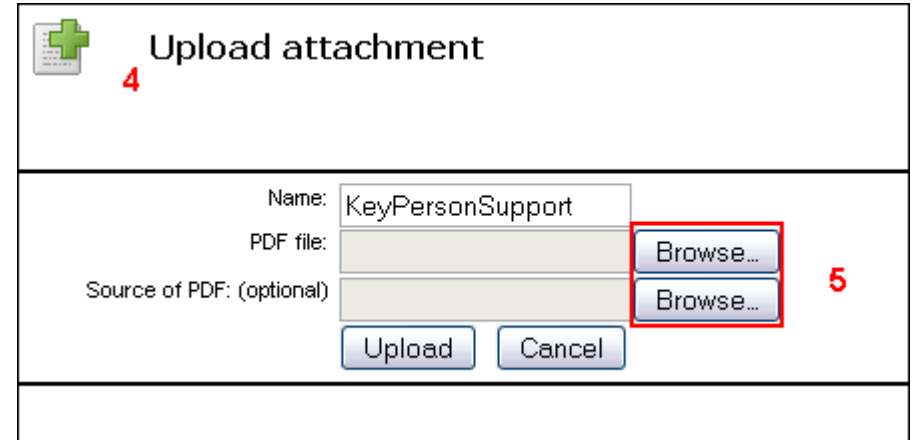
1. Go to the appropriate page on the form set (e.g. Key Persons page)
2. Locate attachment point (e.g. Current & Pending Support)
3. Click **Add Attachment**

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

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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**



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Upload attachment

Name: KeyPersonSupport

PDF file: Browse...

Source of PDF: (optional) Browse...

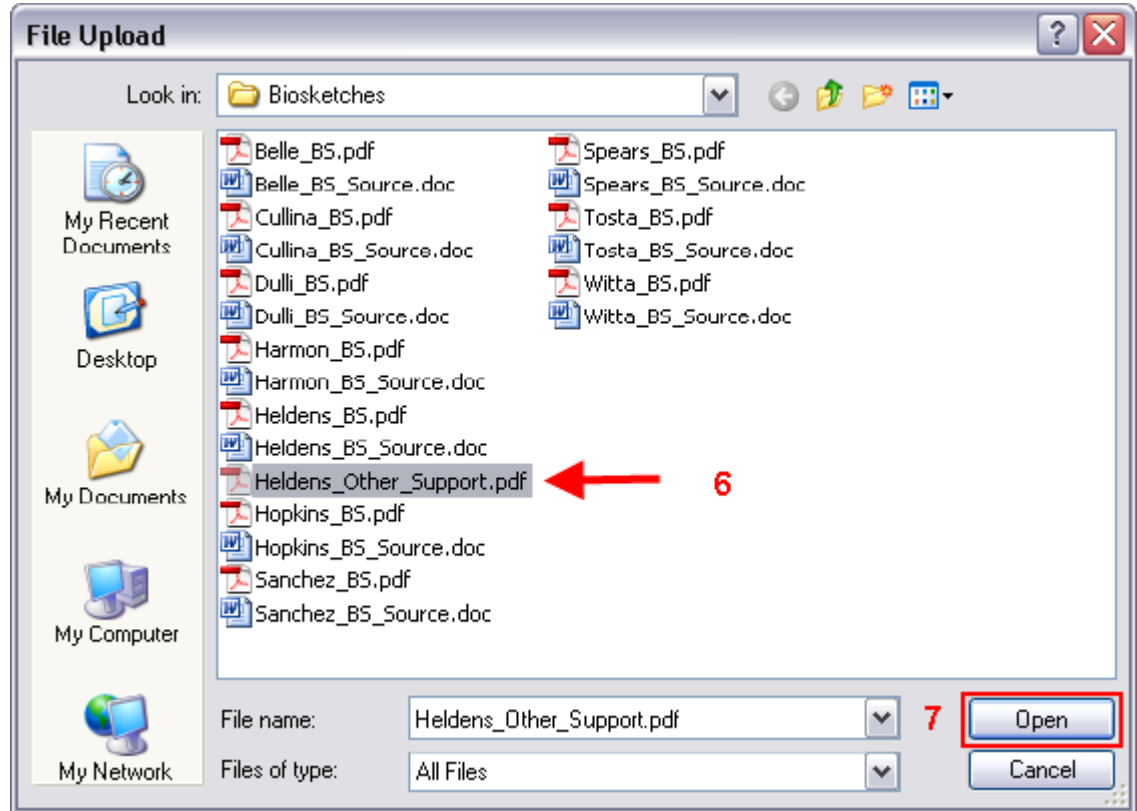
Upload Cancel

5

Attaching Documents

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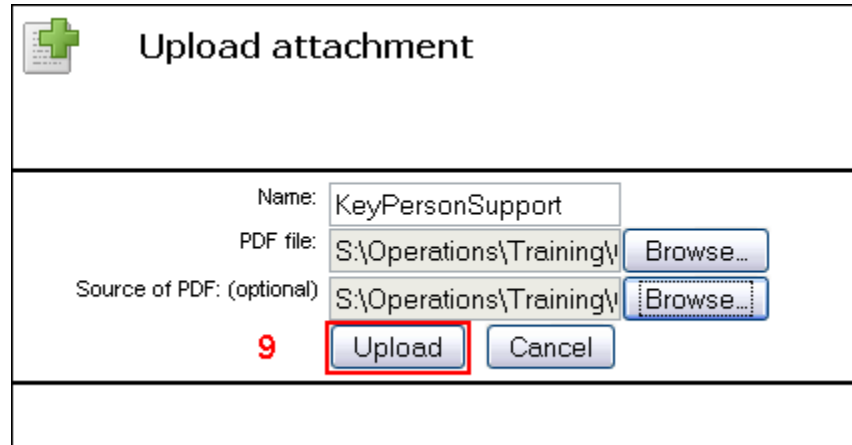
6. Locate the PDF version of the file you wish to attach
7. Click **Open**
8. Repeat for source file



Attaching Documents

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



Upload attachment

Name: KeyPersonSupport

PDF file: S:\Operations\Training\ Browse...

Source of PDF: (optional) S:\Operations\Training\ Browse...

9 Upload Cancel

Attaching Documents

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

*Attach Biographical Sketch	(no pdf) (no src)	Add Attachment	Delete Attachment	
Attach Current & Pending Support	KeyPersonSupport	pdf src	Add Attachment	Delete Attachment

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 “all at once” you can use the “**Exploder**” process (described in the next several slides)

Using the “Exploder”

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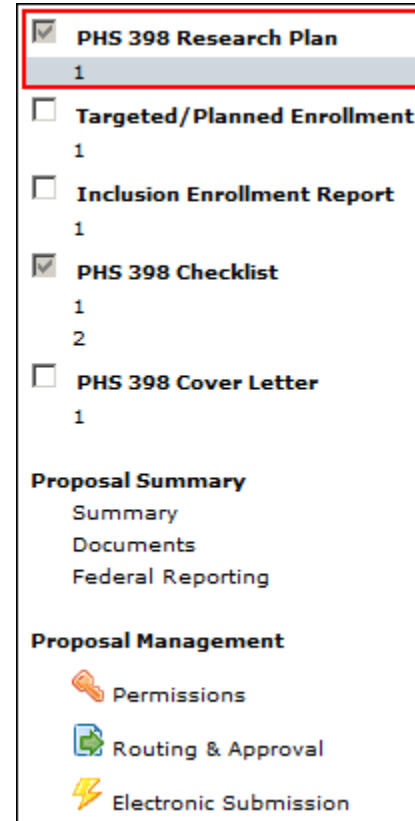
IMPORTANT NOTE: Slides 10 – 14 apply only to submissions to PHS agencies.

1. Take a properly formatted (see the Grants.gov Application Guide SF424 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”

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3. Login to Cayuse424, open your proposal and navigate to the PHS 398 Research Plan section






The screenshot displays the 'Exploder' menu in Cayuse424. The menu is organized into several sections:

- PHS 398 Research Plan** (checked, highlighted with a red box)
 - 1
- Targeted/Planned Enrollment**
 - 1
- Inclusion Enrollment Report**
 - 1
- PHS 398 Checklist**
 - 1
 - 2
- PHS 398 Cover Letter**
 - 1

Proposal Summary

- Summary
- Documents
- Federal Reporting

Proposal Management

-  Permissions
-  Routing & Approval
-  Electronic Submission

Using the “Exploder”

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4. Upload your Research Plan PDF to “0. Composite PDF”

PHS 398 Research Plan

1. Application Type:
From SF 424 (R&R) Cover Page and PHS398 Checklist. The responses provided on these pages, regarding the type of application being submitted, are repeated for your reference, as you attach the appropriate sections of the research plan.

*Type of Application:
 New Resubmission Renewal Continuation Revision

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	(no pdf) (no src)	Add	Delete
3. * Research Strategy	(no pdf) (no src)	Add	Delete
4. Inclusion Enrollment Report (IER)	View Generated Attachment	Override	Revert
5. Progress Report Publication List	(no pdf) (no src)	Add	Delete

Using the “Exploder”

5. Success! Breaking apart the Research Plan succeeded!

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

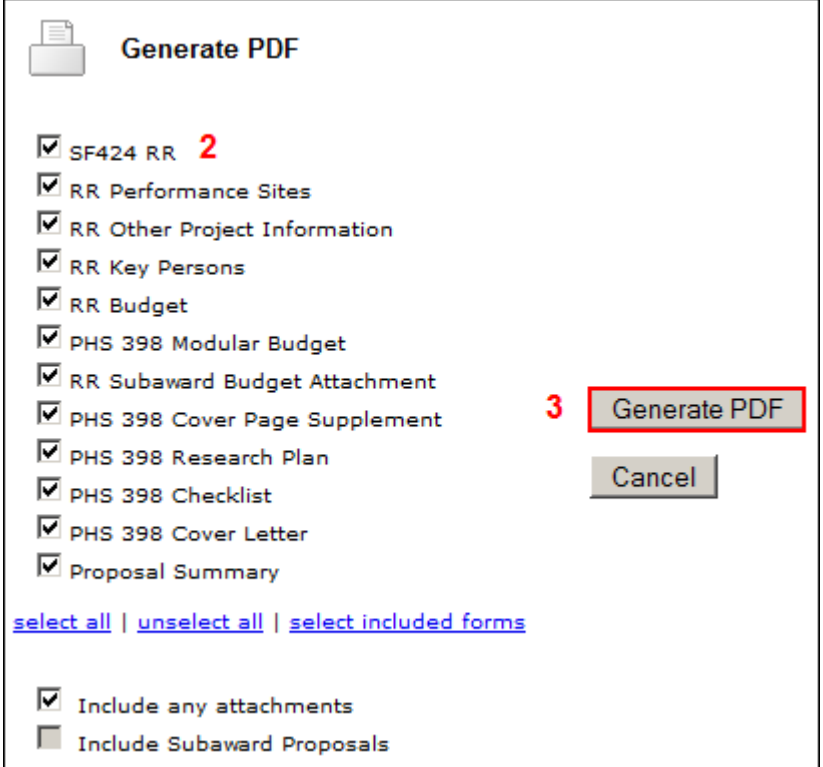
The following recognized bookmarks were found and used to create the associated research plan sections:


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

Viewing Proposals in PDF Format

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- You can generate a PDF to see how your proposal looks at any time
- 1. Click **Print** icon [] at the top right hand side of the proposal
- 2. Check all appropriate sections. You can select as many or as few sections as desired
- 3. Click **Generate PDF**
 - Cayuse424 will generate a PDF of all selected sections
 - Save or print the generated PDF version



 **Generate PDF**

- SF424 RR **2**
- 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

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Conclusion

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- ☑ 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

