PERA Funding Proposal - Document Management

Document Type	Descriptive 1st Word with File Name	Instructions	Required
Sponsor Guidelines/ Request for Proposal	RFP XXXXX	Sponsor guidelines should be uploaded unless they are in the SmartForm. If RFP was via email from sponsor, upload this email. Include all corresponding amendments.	Required if not in SmartForm.
Project Summary/ Abstract	Science XXXXX (Summary, Abstract)	This is usually a short 1-2 page document describing the scope of work.	If applicable.
Project Description/ Narrative/ Statement of Work	Science XXXXX	This should be the project description, narrative, SOW, etc. Upload the FINAL version.	Final Required prior to Department Review. Must be uploaded for ALL proposals.
Data Management Plan	DMP XXXXX	Upload the final Data Management/Resource Sharing Plan. This is a required document for many sponsors.	Required for ALL submissions with this requirement as a separate attachment.
Budget Justification	Budget Justification	Upload the final budget justification. This is the narrative describing costs related to the project. Required for ALL proposals per policy.	Final Required prior to Budget Review and Department Review. Must be uploaded for ALL proposals.
Budget Template Spreadsheet	Budget Int XXXXX	This budget spreadsheet provides the best view of the full budget. It will be used by Post Award and Finance if project is awarded.	Final Required prior to Budget Review and Department Review. Must be uploaded for ALL proposals.
Sponsor Budget Form	Budget Ext XXXXX	If the sponsor guidelines require a sponsor specific budget form outside of S2S, upload here. Ex. EERE, ARPA-E, DARPA.	If applicable. Final Required prior to Budget Review and Department Review.
Other Budget Related Documents	Budget XXXXX	Any additional budget documentation such as PI provided spreadsheets, Equipment Quotes or Travel Calculations.	If applicable.
Cost Share Spreadsheet	CS Spreadsheet PI Last Name FP#	The Cost Share Spreadsheet is required for ALL proposals with cost share, regardless of the number of units providing a commitment.	If applicable. Required when Cost Share is included from multiple units prior to Review. Final should be uploaded prior to Budget Review or Department Review.

Salary Cap Spreadsheet	CS SalCap PI Last Name School FP#	The Salary Cap Spreadsheet is required for ALL proposals with Salary Cap. One spreadsheet per school.	If applicable. Required when Salary Cap is included. Final should be uploaded prior to Budget Review or Department Review.
Cost Share Letters or other Commitment Documents	CS Letter XXXX	Use if cost share commitments have been made through letters from an external source. Upload any cost share commitment letters from Internal sources.	If applicable.
Subaward Information	SUB SubName Type of docs. Ex. SUB MichSt All Docs	Include the institutional letter, SOW, and budget/budget justification, F&A/Fringe Agreements, etc. from each subaward. If budget is provided in Excel, upload separately. Each subaward should be uploaded separately. R&R Budgets used for S2S are to be uploaded to the Subaward Budget.	If applicable. Final Required prior to Budget Review and Department Review.
Fellowship Documents	Fellow	Attach all necessary fellowship documents including Grad School GTS Calculator.	If applicable. Final Required prior to Budget Review and Department Review.
Contracting Documents	Contr XXXXX	Include any documents related to contracting that may have been discussed or included as part of the proposal process. This also includes email correspondence from contracting.	If applicable. Required prior to Department Review.
Reps & Certs/ Assurances	Reps XXXXX	Upload any signed Reps & Certs/Assurance documents that are required per sponsor guidelines.	If applicable. Required prior to Department Review.
Miscellaneous Other Documents	Misc XXXX	Should include any important documents or emails related to the proposal development	If applicable.
Personnel Documents	Person XXXXX	Use for any personnel documents that are not included in the sponsor submission. New PI offer letters should be included here.	If applicable.
Non-PERA Obtained Approvals	Approval XXXXX	Use to include any approvals which may have been obtained outside of PERA.	If applicable. Required prior to Department Review.
External Email Communications	ExtEmail XXXXX	Use for any important emails from the sponsor or other collaborators that are relevant to proposal development.	If applicable. Required prior to Department Review.

Internal Email Communications	IntEmail XXXXX	Use for any important emails from the sponsor or other collaborators that are relevant to proposal development.	If applicable. Required prior to Department Review.
PI Certification Language PDF	PI_CoPI Certification Attachment	Include the certification language for PI and Co-PI approvals with active links to resources.	Required for ALL Submissions, prior to sending Ancillary Review. Must be uploaded for ALL proposals.
Final Proposal Package	Submission	Include the final pdf of the full proposal package. Non-pdf files can be uploaded separately. Not required if submitted S2S.	Required prior to Department Review for ALL non S2S proposals.
Submission Confirmation	SubmitConfirm	Include the submission confirmation from the sponsor. Not included in 'Add Attachments.'	Required for ALL non S2S proposals to be uploaded to the Submit to Sponsor Activity.
Visual Compliance Screening	VC FP#	Include a pdf for Visual Compliance Screening with a match or alert.	If applicable. Required as Ancillary Review attach.
JIT Document-ation	JIT XXXXX	Each JIT submission, new/updated/revised documents should be retitled accordingly.	If applicable.

Most documents can be uploaded with Drag and Drop. To provide additional information about an attachment, select +Add =>Show Advanced Options.

- Documents uploaded throughout the SmartForm or Budget, should be downloaded and moved to the 'Add Attachments' activity. Documents within the SmartForm or Budget are not editable or able to be deleted after proposal submission. SmartForm or Budget files do not appear in the 'Attachments' tab of the Workspace.
- The only documents that should be uploaded outside of 'Add Attachments' activity are the R&R Subaward Budget, this will upload to the SF424 from the Subaward Budget.
- Include a descriptive 1st word as outlined above. PERA organizes files alphabetically, these 1st word requirements will keep similar documents together and make searching for documents easier.
- When uploading email communications, overwrite previously uploaded versions to include the full email thread. Avoid uploading duplications of the same communication. However, when possible, separate communication uploads by topic.
- Do not overwrite prior documents. Each JIT submission, New/Updated/Revised document etc. should be retitled accordingly. Use the Show Advanced Options to identify differences.