Funding Proposal Attachments

Use this Quick Guide to identify and manage attachments in a Funding Proposal record. The goal is to help users distinguish between **internal attachments** and those that **must be included in the proposal submission to the sponsor** (e.g., budgets, statements of work, support letters).

Following these steps will:

- Prevent confusion caused by duplicate attachments.
- Clarify which documents are required for submission to the sponsor.
- Streamline the proposal process, ensuring accuracy and efficiency.

Important
All documents — both those **submitted to the sponsor** and those **required for SPA's internal review** — must be stored in the Attachments tab on the landing page of the FP record. Use the naming conventions below to clearly label each document for easy identification.

Before You Start

1) Save each file with a clear, purpose-forward filename (e.g., Budget_Proposal_2024, Support_Letter_ABC_Org) directly on your computer or file storage system.

2) Prefix internal-only files with "INTERNAL_" (e.g., INTERNAL_Budget).

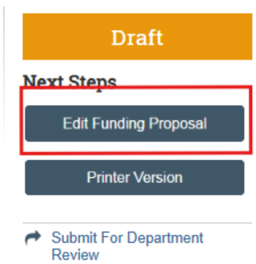
3) Gather the list of sponsor-required documents you will enter later in Smartform Question 4(b).

Choose Your Upload Method

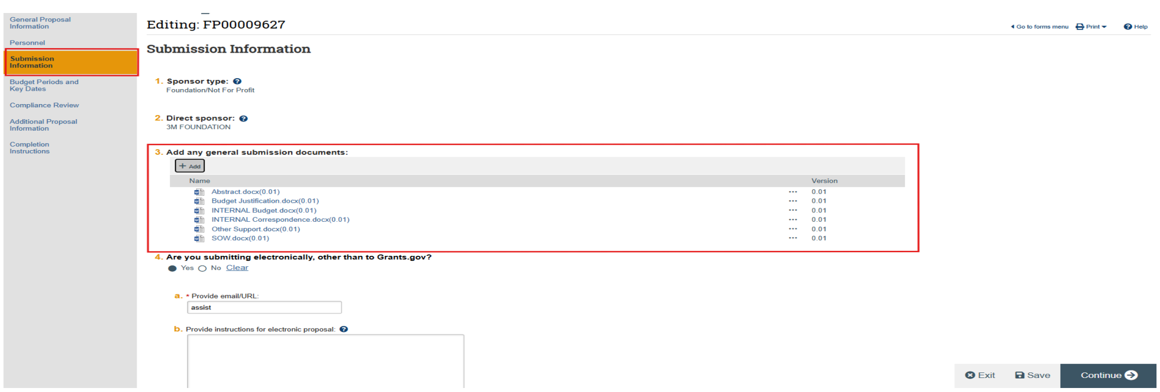
You can upload attachments using either Method A or Method B below. Use the method that fits your workflow.

Method A — Smartform (Question 3)

A1) Open the Funding Proposal record and select “Edit Funding Proposal”.



A2) Navigate to the Submission Information Smartform and go to Question 3 (General Submission Documents).

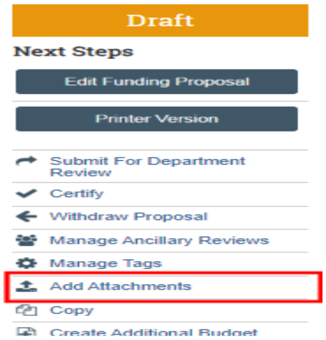


A3) Click “+Add” or drag-and-drop your files into Question 3.

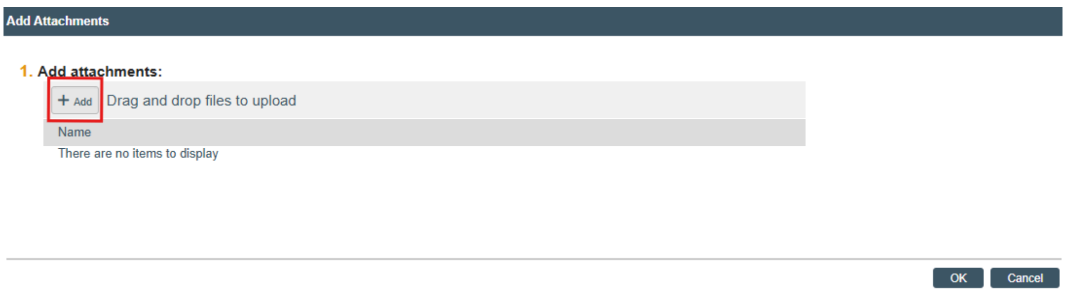
A4) Repeat until all applicable documents are added.

Method B — Add Attachments Activity (FP Landing Page)

B1) From the FP workspace landing page, click “Add Attachments”.



B2) In the pop-in window, click “+Add” or drag-and-drop your files.



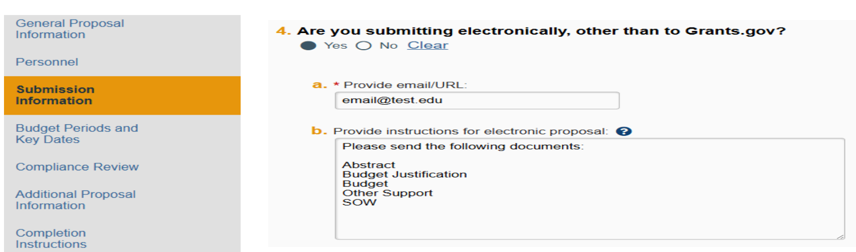
B3) If using “+Add”, click “Choose File”, select your file(s), then click “OK” or “OK and Add Another”.

B4) Close the window when finished.

Verify & List Required Attachments

4) Verify your files appear in the Funding Proposal record’s Attachments tab after uploading (regardless of method).

5) In the Submission Information page of the Funding Proposal Smart Form page, go to Question 4(b) and **list all attachments that must be submitted to the sponsor.**



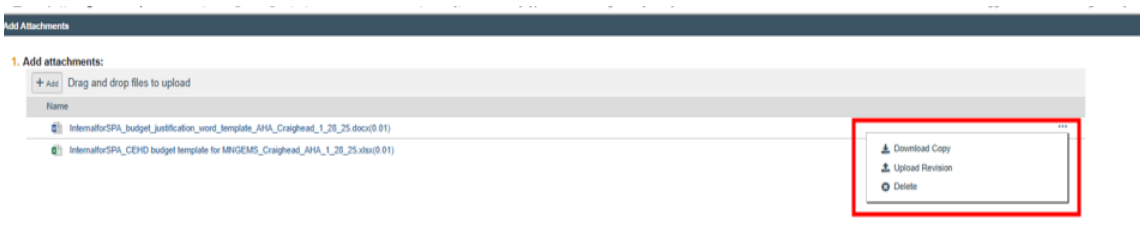
When Revisions Are Requested by the Specialist

6) Open the “Add Attachments” activity on the FP landing page.

7) Click the ellipses (...) next to the document you need to change.

8) Choose “Upload Revision” to replace the file and avoid version confusion.

9) If a file is no longer needed, choose “Delete” to remove it.



Reminder
Do not email revised files or upload them via Add Comment — this causes version confusion and they will not appear in the Attachments tab.

Do / Don’t Checklist

✅ Do

- ☐ Use clear file names (e.g., Budget_Proposal_2024.pdf)
- ☐ Prefix internal-only files with INTERNAL_
- ☐ Upload through Smartform Q3 or Add Attachments
- ☐ Confirm files are visible in the Attachments tab
- ☐ Record sponsor-required documents in Smartform Q4(b)

❌ Don’t

- ☐ Don’t upload to the Budget Record (won’t appear in Attachments)
- ☐ Don’t upload to the Add Comment activity (won’t appear in Attachments)
- ☐ Don’t attach proposal documents to Ancillary Review activity (duplicates Attachments) (*Exception*: *forms specifically needed for that review, e.g., F&A Waiver Request*)