

Folder	Attachment Category	Document Naming and Examples	Description
Submission	Proposal	All/Only attachments under this category should represent the actual submitted proposal. If a proposal is resubmitted due to corrections/changes, right now we are keeping all versions that have been sent to the sponsor.	
		Full Proposal	Use when submitted proposal can be uploaded as one entire document
		<i>or</i>	
		Narrative	Use when submitted proposal is not one entire document
		Budget	
	Justification		
	[Other Attachments or Funder Forms]		
	Pre-Proposal	Documents going to the Sponsor that are not considered submissions	
		Letter of Intent	Letter of Intent
		Pre-Proposal	Pre-Proposal
	Sponsor Documentation	Use for documentation that supports the submission or proposal	
		Announcement	RFP or guidelines
		Policy Statement	Funder policy document
		Declination	Letter from sponsor that proposal was denied
		Policy [area]	Funder policies not as one large document
		[Other]	Correspondence from sponsor, requests for additional information or revisions, etc.
Internal Documentation	Use for internal forms with signatures representing approvals and email approvals		
	Routing Sheet	Signed Internal Routing Sheet	
	F&A Exemption	Signed F&A Exemption Form	
	OSP Excel Budget	Use with either Proposal or individual pieces	
	Release time approval	Email from Dept chair/Dean	
	Proof of Mailing	Receipt from post office or other service provider, something with a tracking number if available	
	Declination	Proposal not awarded	
	[Other]		
Award	Sponsor Documentation	Use for award documentation and anything coming from the funder approving activities	
			For grant award notice, notice of award, etc. For multi-year projects, its important to identify either project year or period. So "Award Notice - Period 1" or "Award Notice - 7/1/09 thru 6/30/10"
		Award Notice [date]	
		Agreement for Review [date]	For initial contract received from sponsor
		Fully Executed Agreement [date]	For final contract fully executed by all parties. Original document can be sent to legal for their file.
	Extension [date]	For extension of agreement end date	
	Internal Documentation	Internal Documents can be anything you want to keep generated internally	
		Cost Share Budget Amendment	For signed documents sent to Budgeting
		Cost Share IDT	For signed documents sent to Accounting Services
		OSP Fund Request	For document sent to Accounting Services
		[Other]	Correspondence, etc.
	Reports	Any documentation sent to the funder representing progress on the project and relating information	
		Invoice [date]	Invoices sent to sponsor
		Programmatic Report [date]	Programmatic reports sent to sponsor
		Financial Report [date]	Financial reports sent to sponsor
Final Report [date]		Final report sent to sponsor	
Sub-Agreement	Documentation following any sub agreements on this project, including correspondence		
	Subcontractor Name [date]	Agreement with a subcontractor	
	Extension [date]	Extension of agreement with subcontractor	
Cost Share	Internal Documentation	Documentation following all cost share transactions for this project, including correspondence, that are internal to UCM	
		Approval Form	Signed Cost Share Form
		IDT and Budget Amendment	Forms used to 'execute' the cost share
	Sponsor Documentation	Documentation following all cost share transactions for this project, including correspondence, that are from the sponsor	
		[Funder Policy or communications]	Policy information or communications from sponsor