

## Entering a Preliminary Proposal in Cayuse

For the most part, preliminary proposals are entered the same as full proposals. There are a few differences, however, as detailed below. Each **page** appears in the side navigation to the left-hand of the screen.

**General Information Page** – 3 sections should appear differently under the General Proposal Information Section: *Short Project Name*, *Proposal Type*, and *Title of Project*.

For *Short Project Name*, the phrase “Preliminary Proposal” should precede the name of the project.

**Project No:**

**\* Short Project Name:** Preliminary Proposal - NSF (internal reference name)

For *Proposal Type*, select “Letter of Intent/Preliminary Proposal.”

**\* Proposal Type:** Letter of Intent/Preliminary Proposal ▼

For *Title of Project*, the phrase “Preliminary Proposal” should precede the title of the project.

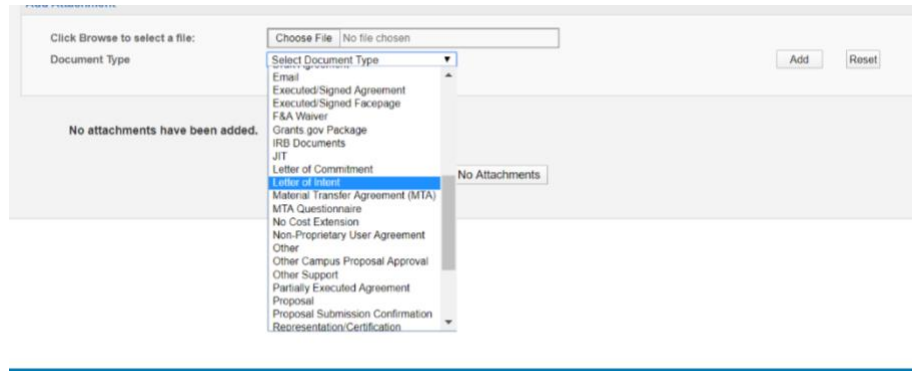
**\* Title of Project:**

Preliminary Proposal - NSF Research Project

**Budget Page** – To avoid duplicate counting of amounts requested if a sponsor invites UTC to submit a full proposal, the budget for a preliminary proposal is always set at **\$0** (even if a budget is required for the submission.)

	Current Period	Entire Project
<b>SPONSOR DIRECT COSTS:</b>	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
BASE for F&A Rate (1):	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
BASE for F&A Rate (2):	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
BASE for F&A Rate (3):	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
<b>INDIRECT COSTS (F&amp;A):</b>	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
FEE:	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
<b>SPONSOR PROPOSED COSTS:</b>	\$ <input type="text" value="0"/>	\$ <input type="text" value="0"/>
Internal Cost Sharing:	\$0	\$ <input type="text" value="0"/>
Third-Party Cost Sharing:	\$0	\$ <input type="text" value="0"/>
<b>TOTAL PROJECT COSTS:</b>	<b>\$0</b>	<b>\$0</b>

**Proposal Attachments Page** – Select “letter of intent” from the drop down menu for Document Type.

The screenshot shows a web interface for uploading attachments. On the left, there is a section titled 'Click Browse to select a file:' with a 'Document Type' label. Below this, it says 'No attachments have been added.' In the center, a dropdown menu is open, displaying a list of document types. The 'Letter of Intent' option is highlighted in blue. To the right of the dropdown, there is a 'Choose File' button with 'No file chosen' text, and 'Add' and 'Reset' buttons. The background of the interface is light gray.

**Submission Notes Page** – Enter explanatory information concerning the budget, depending upon whether or not a budget is required in the preliminary proposal.

- **If a budget is required** for the preliminary, add an explanatory note such as the following:

This is a preliminary proposal. A preliminary budget is required and has been attached for your review. We have not entered a budget on the budget page to avoid duplicative counting of funds requested at the full proposal phase. If invited to submit a full proposal, the final proposal and budget will be routed in TERA-PAMS for your approval.

- **If a budget is not required** for the preliminary, add a submission note that the final budget will be circulated for approval when/if the actual proposal is requested, such as the following:

This is a preliminary proposal. A preliminary budget is not required. If invited to submit a full proposal, the final proposal and budget will be routed in TERA-PAMS for your approval.