

PI-OSP Proposal Submission Checklist

This checklist outlines the key steps Principal Investigators (PIs) should follow when working with the Office of Sponsored Programs (OSP) on proposal submissions.

Step	Action	Timeline	Responsible Party	Reference / Notes
1	Confirm PI eligibility to serve as Principal Investigator	Before initiating any proposal activity	PI	Reference the PI Eligibility SOP
2	Notify OSP of planned proposal submission	At minimum 10 business days prior to the proposal submission deadline (sponsor's published deadline or an agreed-upon deadline in writing)	PI	Reference the Notice of Intent (NOI) SOP; NOI must be completed via Softdocs
3	Discuss cost-share/match requirements with internal leadership (Chair, Dean, VP for Research & Economic Development, VP for Administration & Finance), if applicable	As soon as PI knows cost-share/match will be required — well before the 5-business-day internal deadline	PI (in coordination with leadership)	Early "heads-up" recommended to allow leadership adequate review time
4	Upload submission-ready proposal (including budget and budget justification) into Cayuse and route for internal leadership approvals	No later than 5 business days prior to the sponsor's published deadline	PI	Budget and justification must be included in the Cayuse routing
5	Upload full proposal components into the sponsor's portal	Per sponsor deadline, unless other arrangements made	PI (unless otherwise arranged with OSP)	OSP enters the budget into the sponsor's portal
6	Provide written approval to submit	Before OSP submits to sponsor	PI	Approval typically provided via email
7	Validate proposal for errors and submit to sponsor	Upon receipt of PI's written approval	OSP	Final sponsor submission handled by OSP

Key Deadlines at a Glance

Milestone	Deadline Relative to Sponsor Deadline
Notice of Intent (NOI) submitted via Softdocs	10 business days prior
Cost-share/match conversations with leadership initiated	As early as possible (before the 5-day internal deadline)
Submission-ready proposal (with budget/justification) uploaded to Cayuse for internal routing	5 business days prior
Full proposal uploaded to sponsor portal	On or before sponsor's published deadline
PI written approval to submit sent to OSP	Before sponsor deadline, allowing time for OSP validation