

Document Type	Description	Notes for PC File	Workflow Area
SPS Amendment	This document type is used for increases, decreases, no cost extensions, PI changes, etc. These documents either do not require contracting signature or have been fully executed through contracting.	Amendment sequential number, i.e. "Amend 2"	SPS Award
SPS Amendment Budget	This document type is used to store the Amendment Budget.	Amendment sequential number, i.e. "Amend 2"	SPS Award
SPS Award	This document type is used for new awards. These documents either do not require contracting signature or have already been fully executed through contracting.	If subsequent Award to the original, indicate 1) Year 2) Amount, i.e. "Yr 2 \$250,000"	SPS Award
SPS Award Notification Email	This document type should be used for all award notifications sent to Business Office and PI including, new award, no cost extension, increase, etc.	If: 1) Award - Year of new Award 2) Increase/Decrease a. Award Year b. Amount 3) NCE - 1st, 2nd, 3rd..	SPS Award
SPS Business Office Communication	This document is used to store emails from the BO that may have relevance in closing, approvals, reviews, etc.	1) Topic 2) Object source (WBSE/Vendor/Sub-recipient, PI info, etc.)	SPS Award
SPS Cost Share - Memo Match	This document type can be used for revised form 32s, containing memo match commitments and confirmation from the BO regarding memo match requirements.	1) Memo Match Source 2) Award Year	SPS Award
SPS Cost Share Budget	This document is used to store the cost share budget by category for allocation.	Note if Revision of originally approved Award and the version #	SPS Award
SPS Form 44 - Voluntary Support	This document type is used to house Form 44s that record checks/wires received for deposit to SPS accounts.	1) Amount 2) Date of Check/Wire	SPS Award
SPS Grant Communication	This document type should be used for any e-mail communications that occurs between the Business Office, PI, and SPS.	1) Topic/Key words 2) Object source (WBSE/Vendor, Sub-recipient, etc.)	SPS Award
SPS Initial Award Budget	This document type is used to store the setup budget for the award.	Special notes about budget	SPS Award
SPS Master Agreement	This document type is used for projects funded under a master agreement with a sponsor. The master agreement should be added to all applicable grant files in order to reference terms and conditions.	Year Master Agreement was established	SPS Award
SPS NTP - Notice to Proceed	This document type is used for NTP authorization for Department or University backed NTP while awaiting funding.	1) Start date of NTP 2) Amount	SPS Award
SPS PI Communication	This document type should be used for any e-mail communications out to PI's.	1) Topic 2) Object source (WBSE/Vendor, Sub-recipient, etc.)	SPS Award

SPS Prior Approval - Carryforward	This document type is used to document requests for carryforward of unobligated balances from one budget period to the next when Sponsor approval is required.	1) Award Year being Carried forward 2) Amount, i.e. "Year 1 \$82,000"	SPS Award
SPS Prior Approval - Equipment	This document type is used to document requests for equipment purchases when Sponsor approval is required.	1) Equipment Name 2) Amount 3) Vendor if possible, i.e. "Talos scope, \$695K, FEI"	SPS Award
SPS Prior Approval - No Cost Extension	This document type is used to document requests for NCE when Sponsor approval is required.	Sequential number of NCE, i.e. "NCE #2"	SPS Award
SPS Prior Approval - PI Change	This document type is used to document request for PI change when Sponsor approval is required.	New PI Name, i.e. "New PI-Hughes"	SPS Award
SPS Prior Approval - PI Transfer	This document type is used request to sponsor for transfer to PI. Requires approval from BO/DH or Unit Leader.	"Transfer to PI XXXXXX"	SPS Award
SPS Prior Approval – Pre Award	This document type is used for requesting approval from Sponsor to use 90 day pre-award period to charge expenses.	"Start (enter date can charge)"	SPS Award
SPS Prior Approval - Rebudget	This document type is used to request approval from Sponsor for a proposed rebudget.	2) Date 3) Budget area i.e. "Rebudget #2, 2/1/2022 REU line"	SPS Award
SPS Prior Approval - Travel	This document is used to request Sponsor approval when there are Travel restrictions or no Travel budgeted.	1) Person 2) Approximate date of travel 3) Destination	SPS Award
SPS Rebudget	This document type stores the approvals and details of a rebudget.	1) Rebudget # 2) Date 3) Budget area i.e. "Rebudget #2, 3/1/2022 Grad line"	SPS Award
SPS Regulatory - Export Controls	This document type is used for Export Control Office to provide authorization to proceed after review of related export controls.	Control topic	SPS Award
SPS Regulatory - Human Subjects/IRB	This document type stores the approval for use of Human Subjects.	IRB #	SPS Award
SPS Regulatory - Radioactivity/Lasers	This document type stores the approval for use of radioactive materials or lasers.	Type of Regulatory	SPS Award
SPS Regulatory - rDNA/Biohazard	This document type stores the approval for use of rDNA or biohazard.	Type of Regulatory	SPS Award
SPS Regulatory - Vert. Animals/IACUC	This document type stores the approval from IACUC(Institutional Animal Care & Use Committee) for use of animals.	1) IACUC # 2) Date approved	SPS Award
SPS Relinquishing Statement	This document type is used typically for NIH awards in a transfer of award to a new Institution.	2) Amount 3) New Institution Name	SPS Award
SPS Seed - Amendment	This document type is used for Amendments to the original Seed award.	Amendment sequential # (1, 2...)	SPS Award

SPS Seed - Award	This document type is used for usually internal awards or awards stemming from a larger award to be allocated by particular Sponsor terms.	Source of Funds	SPS Award
SPS Seed - NCE	This document type is used for NCE request/approval on a seed grant.	NCE sequential number	SPS Award
SPS Seed - Proposal Package	This document type is for gathering the submission documents to be submitted to Sponsor.	N/A	SPS Award
SPS Sponsor Approval	obtained for activity/expense not outlined in award and which does not already have a specific Document Type for the approval	1) Subject of approval 2) Date approved	SPS Award
SPS Reports - Technical Report	This document type is used for PI drafted reports on research progress to Sponsor.	Date submitted	SPS Award/SPS Closing
SPS RPPR	DHHS/NSF area for routing annual reports prior to new year of funding. RPPR, Research Performance Progress Report, drafted by PI.	Date submitted	SPS Award/SPS Closing
SPS Interest Earned	This document type records any semi-annual interest earned on the funds.	1) Amount 2) Date	SPS Cash
SPS Closing Checklist	This document type is used to track progress of closing process, used internally by the Closing Team.	Date to begin routing for approvals	SPS Closing
SPS Closing Documents	This document type houses multiple Reports run in SAP to ensure no outstanding circumstances remain.	Completion date	SPS Closing
SPS Residual Transfer	This document type stores information for residual transfer at end of a Fixed Price Contract. Fixed Price Contracts allow remaining funds to transfer to PI discretionary	1) Amount 2) FI Doc # of FV50	SPS Closing
SPS Proposal - Budget Justification	latest approved Budget Justification version.	N/A	SPS Proposal
SPS Proposal - Budget Spreadsheet	This Document Type is used for overall budget in proposal.	If revised after print file, indicate a. Revised b. and Date	SPS Proposal
SPS Proposal - Coeus Budget	This document type content should be the latest approved Coeus Budget version.	N/A	SPS Proposal
SPS Proposal - Communication	miscellaneous proposal communication not already covered by another document	Topic of Communication	SPS Proposal
SPS Proposal - Contracting Documents	This document type can be used for a variety of contracting information such as quotes, MOU,etc.	2) Document content, i.e. "American Chemical Society publishing release"	SPS Proposal
SPS Proposal - Cost Share Spreadsheet	This document type is used to detail cost share within a proposal.	If revised indicate a. Revised b. and Date	SPS Proposal
SPS Proposal - F&A Waiver Documentation	This document type contains information used to justify and to request F&A waiver and states F&A rate to be used.	Agreed F&A rate	SPS Proposal
SPS Proposal - Fellowship Document	This document type is used for stating the terms of Fellowships regarding support.	Any critical/unusual restrictions	SPS Proposal

SPS Proposal - Form 32	This document type states the approved commitment by category and period. Requires Unit/Department Head approval committing stated support.	Source of Funds Area (College/Unit, etc.)	SPS Proposal
SPS Proposal - Just In Time	This document type is used to record Sponsor request for latest details for which it has a question before awarding.	Information requested by Sponsor, i.e. Grad Student - Fee Remits budget	SPS Proposal
SPS Proposal - Non-Coeus Approvals	This document type is used to store approvals provided outside of Coues workflow.	1) Subject of approval 2) Date	SPS Proposal
SPS Proposal - Project Summary	This Document type is used for a high level summary of the project, usually taken from the narrative of the proposal.	If change of scope after print file, indicate "Revised Month/Year ".	SPS Proposal
SPS Proposal - PSF	This Document Type is a summary of proposal attributes and has the Coeus Proposal Development #.	If Modification, use sequential number if not original PSF and Date, i.e. "Mod 2 Month/Year"	SPS Proposal
SPS Proposal - RFP/RFA	This document type is the Request for Proposals or Awards by Sponsor/Awarding Unit detailing requirements of Proposal.	N/A	SPS Proposal
SPS Proposal - Route Sheet	summary of proposal attributes and special circumstances requesting Institutional level approval to submit.	If Award modification, indicate modification sequential # and date, i.e. "Mod #2 Month/Year".	SPS Proposal
SPS Proposal - Statement of Work	This document type is a summary of project research activities and deliverables.	Indicate if revised after print file from originally Approved Award 2) Date of revision	SPS Proposal
SPS Proposal - Submission Package	proposal documents sent to the Sponsor for the Proposal, such as Budget, Budget Justification, Statement of Work, Narrative, Deliverables, etc.	N/A	SPS Proposal
SPS Proposal - Submissions Confirmation	This document type stores the email confirmation or webpage confirmation of submitting the proposal to the Sponsor.	N/A	SPS Proposal
SPS Proposal - Subrecipient Information	This document types contains items such as Letter of Intent (LOI) and other documents relevant sub documents.	1) Sub Name 2) Document content.	SPS Proposal
SPS Proposal - Worksheet	This document type is used by Pre-Award to gather information entered by the PI for start of proposal process with alert for special approvals needed/regulations to be followed.	N/A	SPS Proposal
SPS Subrecipient Agreement	This document type is used to store the contractual agreement and terms between Purdue and the subrecipient.	Entity Name	SPS Subrecipient
SPS Subrecipient Amendment	This document type is used to store the executed Subrecipient Amendment.	1) Entity Name 2) Sequential Amendment #	SPS Subrecipient
SPS Subrecipient Regulatory Approvals	The Document Type is used for approvals for Subrecipient research involving regulated research materials/methods.	1) Entity Name 2) Date 3) Approval type (i.e. rDNA, animal, laser, etc.)	SPS Subrecipient
SPS Amendment Draft Regulatory (retired)	This document type was used for increases, decreases, no cost extensions, PI changes, etc.	N/A	SPS Award

SPS Amendment Regulatory (retired)	This document was for amendments that contained regulatory changes.	N/A	SPS Award
SPS Award Draft Regulatory (retired)	This document type was used for increases, decreases, no cost extensions, PI changes, etc.	N/A	SPS Award
SPS Award Regulatory (retired)	This document type was used for increases, decreases, no cost extensions, PI changes, etc.	N/A	SPS Award
SPS Cost Share - Form 32 (retired)	This document type was used for revised form 32s.	Source of Funds Area (College/Unit, etc.)	SPS Award
SPS Form 90 - Fellowship (retired)	This document type was used to store the Form 90 that contained Fellowship terms and stipend schedule.	N/A	SPS Award
SPS GTS (retired)	This document type was used to capture Graduate Tuition Scholarship detail.	N/A	SPS Award
SPS Key Information (retired)	This document type was used for Special information relating to grant similar to notes section in SAP.	N/A	SPS Award
SPS Memo to File (retired)	which Signature Delegation was given to the Senior Operations Manager for Industrial items.	N/A	SPS Award
SPS Regulatory - Other Regulatory (retired)	This document type any miscellaneous Regulatory items not already covered by a specific Regulatory Document Type.	Type of Regulatory	SPS Award
SPS SEED Project (retired)	This document type was used when funding SEED projects off a major award and routed to regulatory as applicable.	N/A	SPS Award
SPS Sponsor Approved Budget (retired)	This document type was used for Sponsor approved budget.	N/A	SPS Award
SPS Proposal – Final Proposal Package	This Document Type contains the set of proposal documents sent to the Sponsor for the Proposal, such as Budget, Budget Justification, Statement of Work, Narrative, Deliverables, etc.	N/A	SPS Proposal
SPS Subrecipient Regulatory Worksheet (retired)	This document was to track progress of processing regulatory documentation and approvals.	1) Entity Name 2) Any significant note	SPS Subrecipient
* Upload as Minimum Documentation (if applicable) = All pertinent documents and communications should be stored in Perceptive Content using the appropriate Document Type. The documents denoted as YES should be uploaded as minimum documentation if applicable, i.e. if there is a subrecipient, the FFATA, Risk Analysis, Agreement and Checklist should be uploaded to PC. These documents allow for tracking, approving, and providing information of common award activities in process/processed for others who may need to review or search the award.			