



NIH Fellowship Checklist – Forms I

Before you begin:

- **READ THE PA/RFA Solicitation:** Pay particular attention to the “Application and Submission Information” section
 - Individual NIH PA/RFA take precedence over the [NIH SF424 Fellowship Guidelines](#); the [NIH SF424 Application Guidelines](#) take precedence over this document
 - Proposals MUST be submitted on or before 5:00 pm Local time on the Deadline Date. If an NIH “standard deadline” falls on a **weekend** or **Federal** Holiday, the deadline is extended to the following business day. For RFAs with specific deadline dates, the deadline is fixed and does NOT change.
 - ***Reminder*** Postdoctoral Research Associates (PDRA) applying for grants, including F32 applications and K-awards, cannot be supported 100% from external grants during the proposal development period. PDRA effort devoted to developing the proposal must be charged to a non-grant account.
 - **Request an eRA Commons ID and ORCID ID:** For all fellowship applications, the candidate is considered the PD/PI. Therefore, the candidate must have an eRA Commons account with the PI role, and the account must be affiliated with the applicant organization. For NIH fellowship applications, the personal profile associated with the eRA Commons username entered in the Credential field for the PD/PI (fellowship applicant) must include an ORCID ID (e.g., orcid.org/0000-0001-2345-6789) in order to pass NIH validation requirements.
 - [Request a User ID for NIH eRA Commons](#)
 - [Request an ORCID ID](#)
 - **Request Reference Letters:** At least three, but no more than five, reference letters are required. Select and notify referees early to give them time to submit their letters. Further instructions found here: [Reference Letters](#)
 - **Review** the NIH Grants & Funding website for additional information: [Individual Fellowships](#)
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- [Cover Letter](#) (generally 1 – 2 pages)
 - [Project Summary/Abstract](#) (30 lines of text)
 - [Project Narrative](#) (2 or 3 sentences)
 - [Bibliography & References Cited](#)
 - [Facilities & Other Resources](#)
 - [Equipment](#)
 - [Biographical Sketch](#) (5 page limit)

- [Introduction to Application](#) (resubmission applications, 1 page limit)
- [Candidate's Goals, Preparedness, and Potential](#) (3 page limit)
- [Training Activities and Timeline](#) (3 page limit)
- [Research Training Project Specific Aims](#) (1 page limit)
- [Research Training Project Strategy](#) (6 page limit)
- [Training in the Responsible Conduct of Research](#) (1 page limit)
- [Sponsor\(s\) Commitment](#) (6 page limit)
- [Letters of Support from Collaborators, Contributors, and Consultants](#) (6 page limit)
- [Description of Candidate's Contribution to Program Goals](#)
- [Vertebrate Animals](#)
- [Select Agent Research](#)
- [Resource Sharing Plan](#)
- [Authentication of Key Biological and/or Chemical Resources](#) (generally 1 page)
- [Human Subjects and Clinical Trial Information](#)
- [Appendix](#)
- [Assignment Request Form](#)

Cover Letter Attachment (no page limit but generally 1 – 2 pages)

Attach the cover letter, addressed to the Division of Receipt and Referral, in accordance with the FOA and/or instructions. [Full instructions pages F-28 and F-29](#). Individual fellowship applicants must include a cover letter that contains a list of referees (including name, departmental affiliation and institution).

Project Summary/Abstract (30 lines of text)

State the application's broad, long-term objectives and specific aims, making reference to the health relatedness of the project (i.e., relevance to the mission of the agency). Describe the research design and methods for achieving the stated goals. In addition to summarizing the research project to be conducted under the fellowship award, describe the fellowship training plan and the environment in which the research training will take place. [Full instructions pages F-36 and F-37](#).

Project Narrative (2 or 3 sentences)

Describe the relevance of this research to public health in, at most, three sentences.

[Full instructions page F-37](#).

Bibliography & References Cited

When citing articles that fall under the Public Access Policy, were authored or co-authored by the applicant, and arose from NIH support, provide the NIH Manuscript Submission reference number or the PubMed Central (PMC) reference number for each article. The "Bibliography & References Cited" attachment should include any references cited in F.430 - PHS Fellowship Supplemental Form (page F-55 and 56) and in the F.500 - PHS Human Subjects and Clinical Trials Information form (F-79). [Full instructions pages F-37 and F-38](#).

Facilities & Other Resources

Describe how the scientific environment in which the research will be done contributes to the probability of success (e.g., institutional support, physical resources, and intellectual rapport). If there are multiple performance sites, describe the resources available at each site. Describe any special facilities used for working with biohazards and any other potentially dangerous substances. Include a detailed description of the institutional facilities and resources available to the fellowship applicant. The information provided is of major importance in establishing the feasibility of the goals of the fellowship training plan. This section may include text derived from organizational sources but should be limited to a description of the facilities and resources needed for the proposed research training plan and not a general description of facilities and resources at the applicant organization. [Full instructions pages F-38 and F-39](#).

Equipment

List major items of equipment already available for this project and, if appropriate, identify the equipment's location and pertinent capabilities. [Full instructions page F-39](#).

Biographical Sketch

Scholastic Performance is no longer required for Fellowship Biosketches

Fellowship awards require a primary mentor, and there may also be co-mentor(s). Mentors and co-mentors should be identified as senior/key personnel and provide biosketches, even though they are not committing any specific measurable effort to the proposed project.

A blank non-fellowship biosketch format page may be found [here](#).

[Full instructions begin on page F-47](#).

NOTE: NIH has delayed the move to the Common Form for the Biographical Sketch. Although not currently required you can still try [SciENCv](#) to help you develop your biosketch and automatically format it according to NIH requirements.

Introduction to Application (resubmission applications, 1 page limit)

Resubmission Applications: See specific instructions on the content of the introduction on the NIH's [Resubmission Application page](#). [Full instructions page F-57](#).

Candidate's Goals, Preparedness, and Potential (3 page limit)

Organize the Applicant's Background and Goals for Fellowship training attachment in the following specified order: A) Overall Training Goals; (B) Candidates Preparedness (C) Candidates Self- Assessment, D) Scientific Perspective [Full instructions starting on page F-57](#).

Training Activities and Timeline (3 page limit)

Follow the page limits for "Training Activities and Timeline" in the NIH Table of Page Limits, unless otherwise specified in the NOFO. Attach this information as a PDF. See NIH's Format Attachments page. Use of hyperlinks and URLs is not allowed unless specified in the funding opportunity. [Full instructions pages F-59](#).

Research Training Project Specific Aims (1 page limit)

State concisely the goals of the proposed research and summarize the expected outcome(s), including the impact that the results of the proposed research will have on the research field(s) involved.

[Full instructions pages F-60 and F-61](#).

Research Training Project Strategy (6 page limit)

Start each section with the appropriate heading – 1. Scientific Foundation and Rationale 2. Approach. [Full instructions begin on Page 61](#).

Training in the Responsible Conduct of Research (1 page limit)

The plan must address the following five required instructional components: (1) Format; (2) Subject Matter; (3) Faculty Participation; (4) Duration of Instruction; (5) Frequency of Instruction. [Full instructions page F-64](#).

Sponsor(s) / Mentor(s) Commitment (6 page limit)

Start each section with the appropriate section heading: **A)** Mentoring Approach and Candidate Mentoring Plan; **B)** Prior Commitment to Training and Mentoring **C)** Commitment to the Candidate's Research Training Plan **D)** Research Training Environment **E)** Candidates Potential

[Full instructions begin on page F-65](#).

Letters of Support from Collaborators, Contributors, and Consultants (6 page limit)

If any collaborators, consultants, or advisors are expected to contribute to the scientific development or execution of the fellow's planned project and research training, attach letters of support from those individuals describing their anticipated role and contributions. [Full instructions page F-67](#).

Description of Candidate's Contribution to Program Goals

NOTE: For NIH applicants, the Description of Candidate's Contribution to Program Goals is no longer required. Do not provide an attachment. [Full instructions on page F-68](#).

Vertebrate Animals

If live vertebrate animals are involved in the project, address each of the following criteria: 1) Description of Procedures; 2) Justifications; 3) Minimization of Pain and Distress. [Full instructions begin on page F-68](#).

For further information, please see [NIH Office of Laboratory Animal Welfare \(OLAW\)](#).

Select Agent Research

Include a Select Agent Research attachment if your proposed activities involve the use of select agents at any time during the proposed project period, either at the applicant organization or at any performance site.

[Full instructions begin on page F-70](#).

Resource Sharing Plan

Effective for due dates on or after January 25, 2023, NIH Fellowship awards are not subject to the NIH Data Management and Sharing (DMS) Policy. A Data Sharing Plan or plans for Genomic Data Sharing will no longer be required within the Resource Sharing Plan attachment.

[Full instructions begin on page F-71](#).

Authentication of Key Biological and/or Chemical Resources

If applicable to the proposed science, briefly describe methods to ensure the identity and validity of key biological and/or chemical resources used in the proposed studies. [Full instructions page F-72](#).

Human Subjects and Clinical Trial Information

Pre and Post-Doctoral applicants are permitted to conduct research involving human subjects; however, they are NOT permitted to lead an independent clinical trial.

Fellowship applicants who are not proposing a clinical trial: Follow the standard instructions to complete the PHS Human Subjects and Clinical Trials Information form. [Full instructions beginning on page F-79.](#)

Fellowship applicants who are proposing to gain clinical trial research experience under a sponsor's supervision (i.e., you will not be leading an independent clinical trial): You will generally follow the standard instructions to complete the PHS Human Subjects and Clinical Trials Information form, but follow relevant Fellowship instructions where they are given. Make sure you are applying to a FOA that allows Clinical Trial Research Experience (this is noted in "Section II. Award Information" of the FOA). Additionally, the sponsor or co-sponsor is required to include a statement to document leadership of the clinical trial. The statement must include the following:

- Source of funding
- ClinicalTrials.gov identifier (e.g., NCT87654321), if applicable;
- A description of how the sponsor or co-sponsor's expertise is appropriate to guide the applicant in any proposed clinical trials research experience; and
- A statement/attestation that the sponsor will be responsible for the clinical trial
- The sponsor must have primary responsibility for leading and overseeing the trial and must describe how she/he will provide this oversight (be careful not to overstate the fellow's responsibilities).
- Include details on the specific roles/responsibilities of the fellow and sponsor, keeping in mind that the terms of a fellowship award do not permit the fellow to lead a clinical trial.

This statement must be included in the "Sponsor and Co-Sponsor Statements" attachment of the F.430 - PHS Fellowship Supplemental Form.

Appendix

Refer to the FOA to determine whether there are any special appendix instructions for your application. See the NIH Guide Notice on the [Appendix Policy](#). [Full instructions begin on page F-77.](#)

PHS Assignment Request Form

The Assignment Request Form may be used to communicate specific application assignment and review requests to the Division of Receipt and Referral. [Full instructions begin on page F-115.](#)

Additional NIH Information [Fellowship Instructions for NIH and Other PHS Agencies - Forms Version I Series](#)

- Fellowship applicants and sponsors are strongly encouraged to speak with a PHS Program Official for Institute- or Center (IC)-specific guidance before preparing an application. Refer to the Table of IC-specific Information, Requirements, and Staff Contacts in the FOA.
- In many instances, the fellow will be participating in research supported by a research project grant for which the IRB review of human subjects is already complete or an exemption has been designated. This review or exemption designation is sufficient, provided that the IRB determines that participation of the fellow does not substantially modify the research.
- In many instances, the fellow will be participating in research supported by a research project grant for which the IACUC review has been completed and approval obtained. This review is sufficient, provided that participation of the fellow does not substantially modify the research.
- After submission of an application, there is a two-day application viewing window. Prior to the due date, you may submit a change/corrected application. Submitting a change/corrected application will replace the previous submission and remove the previous submission from consideration.
- Descriptive Title of Applicant's Project: The descriptive title is limited to 200 characters, including spaces and punctuation. For resubmission and renewal applications you should normally have the same title as the previous grant or application. However, if the specific aims of the project have significantly changed, choose a new title.

Additional NIH Links

[How To Apply - Application Guide for Forms Version I \(Released Nov. 2024\)](#)

[Individual Fellowships \(F\) Kiosk](#)

[Research Training and Career Development](#)

[Determine the Correct Application Instructions for Your Activity Code](#)

[Parent Announcements \(for unsolicited or investigator-initiated applications\)](#)

[Understand Funding Opportunities](#)

[Types of Applications](#)

[Submission Policies](#)

[Write Your Application](#)

[Format Attachments](#)

[Page Limits](#)

[Standard Application Due Dates](#)

[NIH Frequently Asked Questions \(FAQs\)](#)

[Frequently Asked Questions - Applying Electronically](#)

[Frequently Asked Questions - Resubmissions](#)

[Glossary & Acronym List](#)

[Payback Requirements](#)

[Childcare Allowance](#)

Additional BMRA Links

[Brown Proposal Submission - The Five/Three Day Rule](#)

[BMRA Frequently Asked Questions](#)

[Institutional Data for Proposals and Awards](#)