Overview

The Generic Sponsor Form (GSF) is a template to be used for proposal preparation to facilitate internal routing and approval of applications that are not prepared in Proposal Development (PD) as system-to-system (S2S) electronic submissions directly from PD. Electronic routing for the internal approval process replaces paper transmittals.

The generic template is used for all nonfederal sponsors and for applications to federal sponsors that cannot be submitted S2S, e.g., NIH Program Projects such as P01’s.

The GSF can also be used to assemble a complete proposal package, including a cover page for institutional signature, for sponsors that do not have a specific formset.

Create and set up the proposal record

Consult the PD User’s Guide for more complete details about the New Proposal Questionnaire and Setup Questions.

http://www.upenn.edu/researchservices/PennERA.html

Follow the usual steps to create a proposal, but make these selections as part of Step 1 and Step 3:

New Proposal Questionnaire

- Do not select a funding opportunity (Step 1 Continued...).

- Select a sponsor (Step 3).

- Complete the rest of the New Proposal Questionnaire.

Setup Questions

- Check that Generic Template has been selected as the Submission Mechanism/Screen Template.

- Answer remaining questions on Setup Questions tab.

- Any specific sponsor funding information, including a reference or funding opportunity number, can be entered in the ‘Other funding information...’ field (bottom of the screen).

Complete the proposal

The information and uploads below are the minimum Office of Research Services requirements for generic records. Consult with individual Departments or Schools about any additional requirements they may have.

Abstract

- Upload or enter a brief description of the project.

Personnel

- All personnel are added on the Budget Items tab.

- Biosketch and Other Support documents are not required.

- Enter responsible administrator contact information.

Budget

- Only simplified budget entry is required:
  - Enter Key Personnel, their roles and effort; no salary information is needed.
  - Provide an expense line for total direct costs.
  - Enter F&A requested; F&A is not calculated in a generic record unless a Federal sponsor is used.
  - Provide cost-sharing information when necessary.
  - Upload justification if one is provided to the sponsor.

- More information about simplified budget entry can be found in Appendix A of the PD User’s Guide.

Supporting Documents

- Upload proposal documents that have no other upload location in the record; for example:
  - Completed sponsor’s forms.
  - Internal budget spreadsheets (not required but helpful for review if a detail budget is not entered).
  - Sponsor’s terms and conditions.

Research Plan

- Upload the research plan provided to the sponsor.

Approvals

- Provide regulatory compliance information.

Internal Documents

- Complete Transmittal and PI Certification.

- Upload documents requiring institutional signature.

- If required by your School, upload draft version of Adobe formsets on this tab.

- The final version of the Grants.gov Adobe formsets should be uploaded to the ORS server:

  http://www.upenn.edu/isc/apps/proposalupload.

Finalize

- Build and assemble.

- Submit the record for internal routing and approval.

- Review the Investigator Reference or the User’s Guide for more details about the finalization process. See

  http://www.upenn.edu/researchservices/PennERA.html

  or

  http://www.upenn.edu/isc/apps/proposalupload.

Special instructions for other types of generic records, such as clinical trials, can be found at the PennERA reference website

http://www.upenn.edu/researchservices/PennERA.html