

# PennERA - Proposal Development



Generic Sponsor Formset (GSF)

Interest Areas: Non-S2S Records • Create and Set Up • Complete the Proposal

## 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:  
[PennERA Proposal Development User's Guide](#)

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

### New Proposal Questionnaire

- Set up the proposal manually --  
**Do not select or enter a funding opportunity number (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.
- Click **Save and Continue** at the bottom right of the screen.

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

<https://researchservices.upenn.edu/areas-of-service/pennera/proposal-development-reference-materials/>

## 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.

**Do not upload the same document more than once.**

### Abstract

- Upload or enter a brief description of the project, or reference the Research Plan upload.

### Personnel

- All personnel are added on the Personnel screen.
  - Only Key Personnel, their roles, and effort are required.
- Biosketch and Other Support documents are not required.
- Enter responsible administrator contact information.

### Budget

- Only simplified budget entry is required:
  - 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.
- A detail budget may be entered if the user plans to export to Adobe forms or prefers to have a more detailed budget.

### Supporting Documents

- Upload proposal-related documents that have no other upload location in the record; for example:
  - Completed sponsor's forms.
  - Sponsor's terms and conditions.

### Research Plan

- Upload the research plan provided to the sponsor.

### Approvals

- Provide regulatory compliance information.

### Internal Documents

- Complete or upload documents that are related to the internal review of the proposal; for example:
  - Transmittal and PI Certification.
  - Any other optional forms listed.
  - Documents requiring institutional signature.
  - Internal budget spreadsheets (not required but helpful for review if a detail budget is not entered).

### Finalize

- Build and assemble.
- Submit the record for internal routing and approval.
- Review the [Investigator Reference](#) or the [Proposal Development User's Guide](#) for more details about the finalization process.