

## PennERA v13 to v15 Proposal Development Noted Differences

Screen	Topic	Previous PennERA Version (v13)	Upgraded PennERA Version (v15)
General	Exit PennERA	"Logout" is located in upper right corner of main portal screen.	"Exit" is located in upper left corner, below the PennERA logo.
Setup Questions	Subcontract Initiation	<b>Subcontracts</b> question appears on this screen and must be answered here to create an expense section in the Budget.	This question is no longer necessary. Users create a <b>SubAward</b> as an element of Proposal Structure on either the <b>Personnel</b> screen or in the <b>Budget</b> section.
Setup Questions	Validations	<b>Setup Questions</b> must be "uncompleted" in order to opt out of validations causing restrictions in the record, i.e., budget limit validations that don't apply in a particular situation.	Opting out of validations now occurs in the <b>Budget</b> section on the <b>Setup</b> screen. This eliminates the problem of all screens being uncompleted when Setup Questions was uncompleted in v13.
Setup Questions	Budget Entry Method	User had to select from multiple budget data entry methods.	This question has been removed. Budget data entry is flexible with multiple options, but users do not have to select a specific option and can use a mixed approach as they enter data.
Personnel	Personnel Type, Role	<b>Personnel Type</b> and <b>Role</b> are selected in the <b>Budget</b> section.	<b>Personnel Type</b> and <b>Role</b> are selected on <b>Personnel</b> screen.
Personnel	Personnel Type	Three Personnel Types used: " <b>Key</b> ," " <b>Non-Key</b> ," " <b>Other Significant Contributor</b> ".	Additional Personnel Types are available for use, including <b>Consultant</b> and <b>External Personnel Types</b> . <b>Key</b> and <b>Non-Key Personnel Types</b> may also be added from <b>Budget</b> .
Personnel	Adding Personnel	When a person is added, PD immediately opens a <b>Budget Data Entry</b> screen.	After personnel are added on the <b>Personnel</b> screen, user navigates to the <b>Budget</b> section when convenient to add budget detail.
Personnel	Adding Personnel Other Significant Contributor	Added in <b>Budget</b> as Key Personnel > Other (specify) > description = Other Significant Contributor, effort = 0%.	Must be added from <b>Personnel</b> using the <b>Personnel Type Other Significant Contributor</b> to avoid being listed in the Budget, which will cause submission errors.
Personnel	Adding Personnel with 0% Effort, Other Than Other Significant Contributors (See Above)	Added in <b>Budget</b> with no effort.	All personnel with 0% effort must be added from <b>Personnel</b> using one of the " <b>Consultant Personnel Type</b> " selections (Key or Non-Key); Role can then be identified (e.g., Other Professional > Mentor, as in NIH Career Development applications).
Personnel	Adding External Personnel as Consultant and Other Significant Contributor	Not available as a separate function and were added in Penn's <b>Budget</b> section, although they were not listed in the Budget Detail.	Available as a separate function in <b>Personnel</b> using " <b>External Consultant Personnel Types</b> " (Key, Non-Key, or Other Significant Contributor). Only Key and OSC Type are listed on Senior/Key Person form and none are listed in Budget detail.
Personnel	Adding External Personnel Who Are Not Part of a SubAward	Added in <b>Budget</b> as " <b>New Staff</b> " and affiliated institution identified during the "Add" process.	Institutions affiliated with external personnel who are not part of a SubAward must be listed in Penn's SubAward database.
Personnel	Proposal Structure	Not available.	Can build the proposal structure with <b>Penn as the Prime</b> and the <b>SubAward Organizations</b> involved in the project.
Personnel	Proposal Structure	Not available.	Second tier SubAwards can now be created.

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Personnel	Proposal Structure	Not available.	<b>Personnel for the Prime and SubAward Organizations</b> are color-coded to easily distinguish who belongs to each organization.
Personnel	Ordering	<b>Personnel</b> can be ordered (visually on screen and in S2S Senior/Key Person form) by numerically designating the order for each person.	Ordering is accomplished by drag-and-drop.
Budget	Completing/Locking	Each screen in the <b>Budget</b> section has a " <b>Completed</b> " checkbox.	Only one location is required on the initial Budget screen to mark " <b>Completed</b> " to lock the budget.
Budget	Budget Window	The <b>Budget</b> opens in the same window as other screens.	<b>Budget</b> opens in its own window, facilitating data entry there but also permitting data entry in other screens without having to leave the Budget section.
Budget	Navigating, Data Entry	Each screen must be marked " <b>Completed</b> " before navigating to the next screen to view or enter data.	Navigation and data entry may be done on any screen, in any order.
Budget	Subcontracts	Terminology uses " <b>subcontracts</b> " and " <b>subawardees</b> ".	Terminology uses " <b>SubAwards</b> ".
Budget	Cost Sharing	Cost-sharing information must be calculated by the user outside the PennERA record and manually entered on the <b>Cost Sharing</b> screen.	A new flexible cost-sharing screen is available for data entry. User can enter either a specific cost-sharing amount or percentages for either <b>Institutional</b> or <b>Sponsor</b> portions; PD will automatically calculate the remaining values.
Budget	Cost Sharing	Cost-sharing information is entered on one screen; data disappears when that screen is uncompleted.	Cost-sharing information may be entered for each individual expense item in the detail view but also on the <b>Cost Sharing</b> screen; data does not disappear when the Budget section is uncompleted/unlocked.
Budget	Data Entry	Detail for each item of expense entered on one screen with multiple sections, involving vertical scrolling.	Each expense item contains separate screens for additional details, improving navigation and data entry.
Budget	Budget Forms PDF	Budget forms can only be previewed on the <b>Finalize</b> screen after building the entire proposal record.	A " <b>Build PDF</b> " function is available on the <b>Budget</b> screen to build/view the budget forms in an S2S record.
Budget	Budget Adobe Form Set	Not available.	Ability to extract a Blank Adobe Form Set on the <b>Budget Summary</b> screen, which can then be sent to collaborators for completion and later imported into the Penn Budget.
Budget	Multiple Budget Versions	Limited capability.	Ability to create multiple budget versions allowing for the selection of the final version from the draft versions created.
Finalize	Grants.gov Submission	Submission information only confirms that the application has been successfully handed off to the Grants.gov server.	Submission information now confirms successful receipt and validation by Grants.gov, as well as retrieval and tracking number assignment by the sponsoring federal agency.