Overview

The Non-S2S formset is a screen template used for proposal preparation to facilitate internal routing and approval of applications that are not system-to-system (S2S) electronic submissions.

The Non-S2S 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.

This template may also be used to assemble a proposal package, including a cover page for institutional signature, for sponsors that do not have a specific formset.
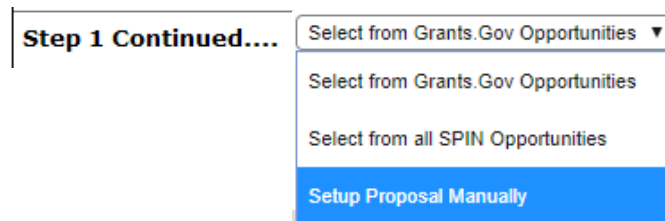
Create and Set Up the Proposal Record

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:
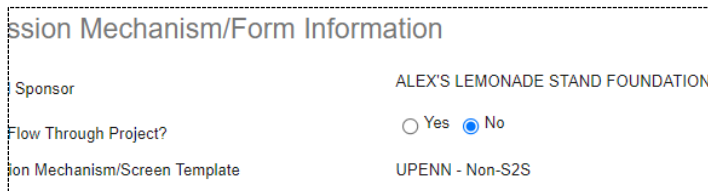
New Proposal Questionnaire
- Set up the proposal manually --
  Do not select or enter a funding opportunity number (**Step 1 Continued...**).

Step 1 Continued....	Select from Grants.Gov Opportunities ▼
	Select from Grants.Gov Opportunities
	Select from all SPIN Opportunities
	Setup Proposal Manually

- Select a sponsor (**Step 3**).
- Complete the rest of the New Proposal Questionnaire.

Setup Questions
- Check that "Non-S2S" has been selected as the Submission Mechanism/Screen Template.

ssion Mechanism/Form Information	
Sponsor	ALEX'S LEMONADE STAND FOUNDATION
Flow Through Project?	○ Yes ● No
ion Mechanism/Screen Template	UPENN - Non-S2S

- Answer remaining questions on Setup Questions tab.
- Click [Save and Continue] at the bottom right of the screen.

Special instructions for child records that use the Non-S2S template can be found at the PennERA reference website: https://researchservices.upenn.edu/document/pennera-proposal-development-child-submission-records/

Complete the Record

The minimum Office of Research Services requirements for non-S2S records are shown below.

IMPORTANT: After creating your record, consult with Department, School, and final University reviewers/approvers *before submitting to **Pre-Review** or **Final Review*** for any additional requirements.

Do not upload the same document more than once. Provide unique filenames for each upload.

Personnel and Budget
- Confirm with university final reviewer about the type of budget required:
  - If simplified personnel and budget entry is permitted, follow the instructions in the PennERA Proposal Development User's Guide in Appendix A.
  - If detail budget entry is required, provide full details as in a typical S2S record.
  - A detail budget is needed if you plan to export the budget to Adobe forms.
- All personnel should be added on the Personnel screen so the correct **Personnel Type** may be selected.
- Enter responsible administrator contact information.
- Provide cost-sharing information when necessary.
- Upload justification if one is provided to the sponsor.

Sponsor Documents
- Upload proposal-related documents being sent to the sponsor; for example (but not limited to):
  - Completed sponsor's forms.
  - Research plan.
  - Summary/abstract/scope of work statement.
  - Progress Report.

Approvals
- Provide regulatory compliance information.

Internal Documents
- Complete or upload documents related to the internal review of the record, for example:
  - Transmittal and PI Certification (default forms).
  - Any other optional forms listed (e.g., SOM PI Research Categorization Form).
  - Documents requiring institutional signature.
  - Internal budget spreadsheets (not required but helpful for review especially if a detail budget is not entered).
  - **All** subawardee/pass-through documents (e.g., LOI).
  - Funding Opportunity Announcement if one has been issued by the sponsor.
  - Sponsor's terms and conditions.

Finalize
- Build and assemble.
- Submit the record for internal routing and approval.
- Review the Investigator Reference or the PennERA Proposal Development User's Guide for more details about the finalization process.