PennERA Child Submission Process

https://www.med.upenn.edu/orss/project-management.html **Annual Progress Reporting (Research Performance Progress Report)**
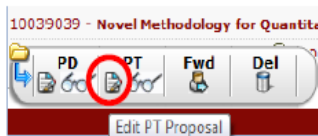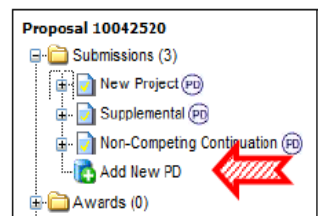
Beginning the Proposal Creation Process

1. Locate the Master Record in which the Child Record will be created, using the "Search For" functionality.

2. In the Results line, click on the Edit icon in PT (Proposal Tracking), *not* in PD (Proposal Development).

3. Click on "Add New PD" in the Submissions section.

4. Additional Submission Questionnaire window will appear.

- It is not necessary to change the PI; it will be automatically copied during the creation process.
- Leave the default selection in **Step 1** at "Copy PI and Sponsor only".

Creating a Noncompeting Child Record

Use this option for noncompeting continuations:

1. **Step 2** – Select "Non-Competing Continuation" from the drop-down list of proposal types; continue to the next step.
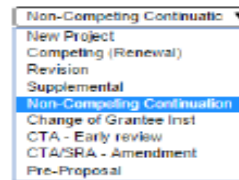
2. **Steps 3-5** – The sponsor and proposal title will be automatically copied from the Master Record.

3. **Step 6** – Enter Start and End Dates covered for this Child Record. Do not enter the entire Project Period unless the Child Record period dates are the same.
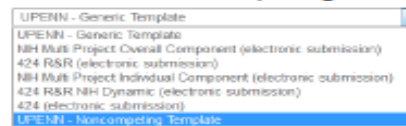
> *For example:*
> Project Period = 7/1/18 – 6/30/23
> Non-Competing Period (Child Record) = 7/1/21-6/30/22.

4. **Step 7** – Verify budget periods and create Child Record.

5. On Setup Questions, change the "Submission Mechanism/Screen Template" to UPENN-Noncompeting Template. **Do not answer any other questions on this screen until the template has been changed and the screen has refreshed.**

6. Answer remaining questions on Setup Questions screen.

7. Enter the information on each screen in the record and mark "Completed". Instructions are provided on some screens for clarification purposes.

- Only a minimal Summary Budget is required.
- If a narrative Budget Justification is not required by the sponsor, the Justifications screen can be marked "Completed" without an upload.
- There is no cover page to build in this record.
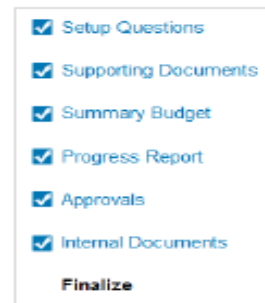
Requirements/attachments needed for Child Record progress report submissions: (Note: it is preferable to **upload all attachments to Supporting Docs** as a pdf as they will all be combined into one Assembled Doc).

Any signature pages needed can be uploaded to Internal Docs to emphasize a signature is needed

- Unless a progress report can be done S2S, almost all Child progress report submissions do not require entering the detailed budget into PennERA (i.e. only requirement is to enter Total Direct Costs and Total F&A)
- Any IRB or IACUC protocols in PennERA should reflect current approvals.
- Signed consortium progress reports from subrecipient sites if applicable.
- [Documented verification of Other Support forms](#) to be submitted should also be uploaded to the Child Record.
- If Penn is a flow through recipient we are expected to prepare the PHS 2590 forms for submission to the Prime recipient and the forms should be uploaded to the Child Record for review and/or signature.
- For RPPR's there is no need to include a draft copy of the RPPR as the RPPR is reviewable in the Commons. The Final submission will be uploaded to PennERA by ORSS.
- Always Select No to NIH R,F,K on transmittal