



Generate the following 3 pages from:

1. Investigator Maintenance*
2. Financial/Travel Status
3. Grant Relatedness Status

Note: Disclosures section can bring back investigators who errantly did a relatedness to the wrong grant or when they didn't need to.

* A printout of Investigator maintenance is no longer needed, but it should show on Grant Relatedness report far right column a certification date in the current FY.

To expedite creation of PHS funded new advance accounts or account continuations (ORSS) it is required to include 2 and 3 above. For noncompeting years requiring a new fund # it will expedite processing if you include the pages with your progress report. Otherwise they will no longer be automatically setting up a fund for the next budget period unless you send or email the pages that prove the grant is FCOI compliant.



PHS FITS - Investigator Maintenance

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ORIS proposal #	Grant title	Award #	PHS sponsor	Sponsor	Responsible ORG	Proposal submit date	Requested start date	Status	# Penn	# non-Penn	Last update date	Certified date
10035687	Genetic altering of peas so kids will eat them	1-R01-DK-089629-01	Yes	National Institute of Diabetes and Digestive and Kidney Diseases/NIH/DHHS	4108	11/19/2009	07/01/2010	Awarded	1	1	07/11/2013	07/08/2013

Listings 1-7 of 7

Name	Penn source	Penn ID	Phone	Email	Institution	Home ORG	Role	Start date	End date	Disclosure type	FCOI Training	Relatedness last updated	Last edited by	Last edited on
[edit] Oswald AVERY	F		267-426-5417	avery@chop.edu	CHILDRENS HOSPITAL OF PHILADELPHIA		Other - Subcontract PI	07/01/2010		Other			montagna	07/11/2013
[edit] M. Capecci	F		267-426-5719	capecci@chop.edu	CHILDRENS HOSPITAL OF PHILADELPHIA		MEDICINE Co-Investigator	07/01/2010	06/30/2012	Other			montagna	07/01/2013
[edit] CRICK,F	T	10004566	2156622066	crickf@uphs.upenn.edu	The Trustees of the University of Pennsylvania	4502 - SU- Surgery Administration	Co-Investigator	07/01/2010	06/30/2012	PHS-FITS	11/16/2012		montagna	07/01/2013
[edit] CHARLES DARWIN	T	10028014	2158980773	darwin@upenn.edu	The Trustees of the University of Pennsylvania	4108 - GE- Genetics	Other - Proj Mgr	07/01/2010	06/30/2012	PHS-FITS	05/30/2013		montagna	07/01/2013
[edit] CARL LINNAEUS	T	10057089	2156180503	linnaeus@mail.med.upenn.edu	The Trustees of the University of Pennsylvania	4502 - SU- Surgery Administration	Co-Investigator	07/01/2010	06/30/2011	PHS-FITS	08/09/2013		montagna	07/08/2013
[edit] GREGOR MENDEL	T	10058692	215-898-3572	mendel@mail.med.upenn.edu	The Trustees of the University of Pennsylvania	4108 - GE- Genetics	PD/PI	07/01/2010		PHS-FITS	10/23/2012	07/08/2013	PennERA	04/23/2013
[edit] JAKE WATSON	T	10151189	2158985210	watson@mail.med.upenn.edu	The Trustees of the University of Pennsylvania	4231 - DM- Endocrinology, Diabetes & Metabolism	Co-Investigator	07/01/2010	06/30/2012	PHS-FITS	11/30/2012		montagna	07/01/2013

Result page: 1

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1. Certify the investigator list is after 07/01/19
2. This is a feed from the original PennERA proposal so use an End Date to remove a person not qualified to be an Investigator or to remove an Investigator who is no longer participating in the research. You should never enter a future end date.



Reports :: Financial/Travel Status

Investigators required to submit financial interests / travel

This report identifies which Investigators have/have not completed SFIs and Travel on both awarded grants and pending PHS proposals. This report lists all Investigators currently listed in Investigator Maintenance where PHS is the Sponsor and one of the following is true: 1) for new or competing awards, the Requested Award Date or Proposal Submitted Date is greater than or equal to 8/24/12; or 2) for non-competing continuations, the PHS Proposal Status = (Awarded or Advance Account) AND the next awarded period start date is after today OR the Awarded Period Start Date is before today and the Awarded Period End Date is blank or after today.

Financial / Travel Submitted	equals	Select Value	Whether financial interest or travel data was submitted for this investigator.
Investigator Penn ID	equals		The Penn ID of the investigator.
Investigator Last Name	like		A value matching part or whole of the last name of an investigator.
ORS Number / Institution Number	equals	10035687	The unique identifier for the grant in ORS.
Investigator Home School Center	in	Available: 40 Perelman School of Medicine	The home school or center of the investigator.
Investigator Home ORG	in	Available: 4000 SM-MG-School of Medicine 4003 SM-MG-Medical General 4005 SM-IT-Information Technology	The home ORG of the investigator.
Proposal Responsible Org	in	Available: 4000 SM-MG-School of Medicine 4003 SM-MG-Medical General 4005 SM-IT-Information Technology	The ORG that is responsible for the grant proposal.
Proposal Submitted Date	greater than or equal to		The earliest date that the research proposal was submitted.
Proposal Submitted Date	less than or equal to		The latest date that the research proposal was submitted.
Requested Award Date	greater than or equal to		The earliest requested award date.
Requested Award Date	less than or equal to		The latest requested award date.
Next Awarded Period Start Date	greater than or equal to		The earliest next awarded period start date of the proposal.
Next Awarded Period Start Date	less than or equal to		The latest next awarded period start date of the proposal.

Listings: 1-2 of 2

Last name	First name	Penn ID	PI	Institution	Home school	Home org	Home org name	Ors number	Project title	Sponsor	Prop resp org	Prop sub date	Req award date	Next award per start date	Fl travel	SFI	Last rev date
MENDEL	GREGOR	10058692	Yes	The Trustees of the University of Pennsylvania	Perelman School of Medicine	4108	GE-Genetics	10035687	Genetic altering of peas so kids will eat them.	National Institute of Diabetes and Digestive and Kidney Diseases/NIH, DHHS	4108	11/19/2009	07/01/2010	07/01/2014	Yes		08/01/2013
AVERY	Oswald	No		CHILDREN'S HOSPITAL OF PHILADELPHIA				10035687	Genetic altering of peas so kids will eat them.	National Institute of Diabetes and Digestive and Kidney Diseases/NIH, DHHS	4108	11/19/2009	07/01/2010	07/01/2014	No		

Result page: 1

1. Confirm the last revised date for SFIs/Travel for all Penn Investigators is after 07/01/19



Reports :: Grant Relatedness Status

Investigators and their Grant Relatedness status.

This report identifies which Investigators have/have not completed or revised their Grant Relatedness per disclosure requirements on both awarded grants and pending PHS proposals. This report lists all Investigators currently listed in Investigator Maintenance where PHS is the Sponsor and one of the following is true: 1) for new or competing awards, the Requested Award Date or Proposal Submitted Date is greater than or equal to 8/24/12; or 2) for non-competing continuations, the PHS Proposal Status = (Awarded or Advance Account) AND the next awarded period start date is after today OR the Awarded Period Start Date is before today and the Awarded Period End Date is blank or after today.

Investigator Penn ID equals _____ The Penn ID of the investigator.

Investigator Last Name like _____ A value matching part or whole of the last name of an investigator.

ORS Number/Institution Number equals 10035687 The unique identifier for the grant proposal in the Office of Research Services.

Disclosure Type equals Select Value [] The disclosure type.

PHS-FITS Status equals Select Value [] The current Grant Relatedness status in PHS FITS.

FIDES Status in PHS-FITS equals Select Value [] Whether PHS-FITS has determined that a FIDES disclosure is required.

Investigator Home School Center in Available: 40 Perelman School of Medicine [] Selected [] The home school or center of the investigator.

Investigator Home ORG in Available: 4000 SM-MG-School of Medicine [] Selected [] 4003 SM-MG-Medical General [] 4005 SM-IT-Information Technology [] The home ORG of the investigator.

Proposal Responsible ORG in Available: 4000 SM-MG-School of Medicine [] Selected [] 4003 SM-MG-Medical General [] 4005 SM-IT-Information Technology [] The ORG that is responsible for the grant proposal.

Relatedness Last Revised Date greater than or equal to [] The earliest date that the Grant Relatedness Assessment for this grant proposal was last revised.

Relatedness Last Revised Date less than or equal to [] The latest date that the Grant Relatedness Assessment for this grant proposal was last revised.

[Execute report](#)

Listings: 1-2 of 2

Last name	First name	Penn ID	AI	Institution	Home school	Home org	Home org name	ORS number	Project title	Sponsor	Prop resp org	Rel last rev	Disclosure type	Related status	Fides status	Foot training	Invest list cert
MENDEL	GREGOR	10058692	Yes	The Trustees of the University of Pennsylvania	Perelman School of Medicine	4108	GE-Genetics	10035687	Genetic altering of peas so kids will eat them.	National Institute of Diabetes and Digestive and Kidney Diseases/NIH/DHHS	4108	07/08/2013	PHS-FITS	FIDES not required; school concurs	FIDES not required by system	10/23/2012	07/08/2013
AVERY	Oswald		No	CHILDREN'S HOSPITAL OF PHILADELPHIA				10035687	Genetic altering of peas so kids will eat them.	National Institute of Diabetes and Digestive and Kidney Diseases/NIH/DHHS	4108		Other	Not Submitted			07/08/2013

Result page: 1

1. Confirm all investigators have completed FCOI training after 07/01/16
2. Confirm FCOI Disclosure Status for all investigators is "FIDES not required; school concurs"