

Upload a document

1. While creating a proposal in Proposal Development, there are several sections that involve uploading of a document. This example will demonstrate the uploading of the "Research Design and Methods" section which is a subset of the PHS 398 Research Plan. The same functionality can be used for all documents needing to be uploaded in Proposal Development.

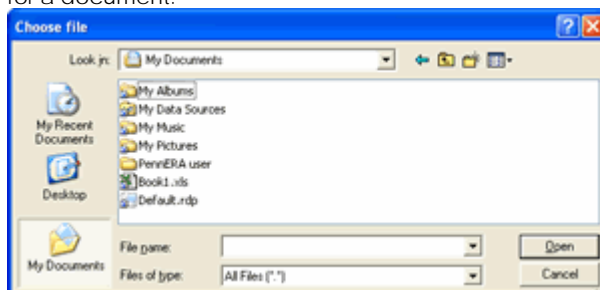
2. Click on the icon next to the corresponding proposal body section to upload.

Specific Aims	
Background and Significance	
Preliminary Studies/Progress Report	
Research Design and Methods	

3. The browse dialog box will appear in the upper right hand corner.



4. Click the "Browse" button. The Windows "Choose file" dialog box will appear where you can browse to search for a document.

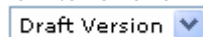


5. Navigate for the document and click "Open". This will put the full document directory path into the text box field.

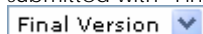


6. Click the upload icon which will upload the document. As each section is uploaded, the application returns the document as a PDF, displays the page count for that document and the total page count overall.

7. To expedite the process, proposals may be submitted for internal review with "Draft Version" selected.



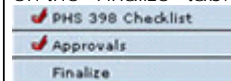
8. However, grants.gov requires the proposal to be submitted with "Final Version".



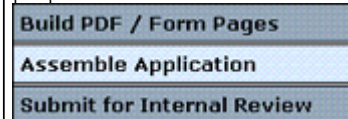
9. The Office of Research Services is unable to submit a "Draft Version". Responsibility should be taken to submit a "Final Version" in accordance with Penn's internal submission deadlines to ensure the proposal is submitted in accordance with the sponsoring agency's posted submission date.

Certify & submit a proposal

1. Once all sections are complete (indicated by a red check mark), you can certify and submit your proposal. To do so, click on the "Finalize" tab.



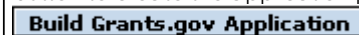
2. Three sections need to be completed in order to finalize the proposal. Click "Build PDF/ Form Pages."



3. Click the "Build" button to convert your proposal to PDF format.

Build PDF / Form Pages				
Form Page	Build	View	Last Built	Built By
SF424 (R&R)				
Performance Sites				
Other Project Info				
Personnel				
Budget				
PHS 398 Cover Page				
PHS 398 Research Plan				
PHS 398 Checklist				

4. Once the build is complete, the next section is the "Assemble Application" section. Click the "Build Grants.gov Application" button to create the application package.



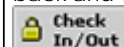
5. Once the build is complete, the next section is the "Submit for Internal Review" section. Click the icon under the "Open" column to fill out the "Certification by Principal Investigator." This form will appear in its own window.

6. Place your mouse over the red "Menu" item. Click the "Check In/Out" button to check the form out for editing.



7. Enter all of the necessary data including all of the required fields (denoted by an *) and check the "Complete" checkbox in the upper right corner. **Complete**

8. Click the "Check In/Out" button again to check the page back and close this window.



9. Click the **Submit** icon to submit the proposal for internal routing. You will be prompted to re-enter your PennKey and PennKey password. Once completed, the application will display the predefined routing path for the proposal.

If the "PHS 398 Research Plan" at any time has been updated from "Draft Version" to "Final Version", the proposal must be rebuilt (Step #3) for sponsor submission. For help, please contact pennerahelp@pobox.upenn.edu