SeRA Proposal Types & System Structure

1. New Proposal
   - PDRF for a New Project/SPO#

2. Resubmission Proposal
   - PDRF for the original proposal not awarded by sponsor

3. Proposal – NCC/Progress Report
   - PDRF for submission of progress report and request for next budget period funding within the existing award

4. Proposal – Supplement
   - PDRF for more funds to support existing or expanded SON within existing award Period of Performance

5. Proposal – Renewal
   - PDRF for additional time and funds

A New Proposal creates a SeRA Project which is assigned a SPO number for the project.

Once a proposal is awarded a SeRA Award Segment is created from which the following may be initiated:
   a. Proposal – NCC/Progress Report
   b. Proposal – Supplement

Proposal – Renewal may be initiated from the SeRA Project or SPO

SeRA Proposal Types & System Structure

Typical PDRF Process Flow Scenarios

1. Administrator fully prepares PDRF content and sends to PI to approve
2. Administrator partially prepares PDRF content and sends to PI to complete and approve

PREPARE

1. Staff

APPROVE

1. PI → Dept Approver → OSR or RMG

INSITUTIONAL REVIEW

1. OSR or RMG

2. OSR or RMG

Other Stanford Faculty

Other Stanford Faculty

Dept Approver
**Initiating a PDRF for a New Proposal (New Project)**

1. Use the “Initiate New Proposal” function when you want to start a proposal transaction for a new project.

   - Select the appropriate “Agreement Type” from the drop-down menu and an “Agreement Sub-Type” if applicable.

3. Click on the “Next” button located at the bottom right of your screen.

4. You will land on the “PI & Project Location” page. Proceed with filling out the Proposal record utilizing the “Next” button located at the bottom right of your screen at every page.
Initiating a PDRF for a Resubmission

Resubmissions can be processed on Proposals with a “Rejected”, “Withdrawn”, or “Proposed/Submitted” Status

A. When the proposal status is “Proposed/Submitted”:
   1. Search for the “SPO #”

   ![Search Window]

   2. Select the “SPO #” from the “Search” window to proceed to the “Project Summary” page

   ![Project Summary]

   3. On the “Project Summary” page, select the applicable Proposal ID of the “Proposed/Submitted” proposal you want to Resubmit

   ![Project Summary]

   4. On the “Proposal Summary” page, select “Proposal- Resubmission” from the “Start a Transaction” menu

   ![Proposal Summary]
Initiating a PDRF for a Resubmission (cont’d)

B. When the proposal status is “Rejected” or “Withdrawn”:

1. Search for the “SPO #”

2. Select the “SPO #” from the “Search” window to proceed to the “Project Summary” page

3. On the “Project Summary” page, click on the “Proposals” tab

4. From the “Proposals” tab, select the applicable Proposal ID of the “Rejected” proposal you want to Resubmit

5. On the “Proposal Summary” page, select “Proposal – Resubmission” from the “Start a Transaction” menu
Initiating a PDRF for a Non-Competing Continuation/ Progress Report

1. Search for the “SPO #”

2. Select the “SPO #” from the “Search” window to proceed to the “Project Summary” page

3. Select the applicable Award Segment that the Non-Competing Continuation proposal is associated with

4. Select “Proposal – NCC/ Progress Report” from the “Start a Transaction” menu
Initiating a PDRF for a Supplement

1. Search for the “SPO #”

2. Select the “SPO #” from the “Search” window to proceed to the “Project Summary” page

3. Select the applicable Award Segment that the Supplement proposal is associated with

4. Select “Proposal – Supplement” from the “Start a Transaction” menu
Initiating a PDRF for a Renewal

1. Search for the “SPO #”

2. Select the “SPO #” from the “Search” window to proceed to the “Project Summary” page

3. On the Project Summary page, select “Proposal – Renewal” from the "Start a Transaction” menu