STEP 1: ACCESS THE PROPOSAL

Proposal Assigned to You ("Prepare PDRF" task):
- Click the link in the email notification sent to you or
- Log into the SeRA web portal at: https://sera.stanford.edu/

1) From the Dashboard, click on the blue PDRF number in the ID# column for your "Prepare PDRF" task

STEP 2: REMOVING OR END DATING AN OSF

1) Click on ‘Project Personnel’ link to view active OSF’s listed on the project
2) Minimize the right-hand navigation window OR use the scrollbar to navigate to the Edit (pencil) and Delete (trashcan) icons.

a. To completely remove an OSF from the Project, click the ‘Remove’ button (trash bin icon).
   - You will be asked to confirm OSF removal, click ‘Ok’
### Stanford Faculty

Add all participating Stanford Faculty, excluding the PI, whose effort is budgeted or cost shared for this project. All participating faculty must approve their participation in the project. Other approvers should be added as required. Click the ROUTE button to initiate the approval routing process for each faculty member listed. Please note, the following information must be entered in the PDF before routing can be initiated. Principal Investigator, Sponsor, Project Title & Administering Organization.

Effective Dates: Faculty without an end date identified are considered active on the project. To re-activate a faculty member shown with an end date, click Set Dates to update the effective dates.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Appt Type</th>
<th>%Effort</th>
<th>Key Prop</th>
<th>Status</th>
<th>Department</th>
<th>Set Dates</th>
<th>Effective Dates</th>
<th>Route</th>
<th>Approval Date</th>
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<tbody>
<tr>
<td>Anabel Velasquez</td>
<td>Co-Investigator</td>
<td>Calendar</td>
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<td>Active</td>
<td>Office of Sponsored Research,BWLO</td>
<td>01/01/2016</td>
<td>01/01/2016</td>
<td>Route</td>
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<tr>
<td>Cassie Esquivel</td>
<td>Co-Investigator</td>
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<td>01/01/2016</td>
<td>01/01/2016</td>
<td>Route</td>
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</tbody>
</table>

sera.stanford.edu says:

Are you sure you would like to remove Maria BedollaMatte?

Click 'OK' to confirm removal.

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OSF has been successfully removed from project.
b. **(NCC Proposal only)** If an OSF is not participating in the current funding period but will be participating on the project in future years, you can change their status to ‘Inactive’.

- Click on the ‘Edit’ button (pencil icon)

- Scroll down to the ‘Effective Dates’ section to edit OSF’s End Date.

Note: The effective dates reflect the time this faculty member participated (or plans to participate) on this project. Please set these dates as follows:

- *If the faculty member is actively working on the project, leave the end date field blank.*

- *If the faculty member is no longer working on the project, enter an end date based on when their project participation stopped.*

- *If the faculty member re-joins the project, add a new effective date range with a new start date.*
• Click ‘Next’ at the bottom of the page to return to the OSF page

3) Repeat steps 1 -2 to Remove or End Date OSF