What has Changed?

This release delivers **Cayuse 424 / PDRF Integration**! This integration allows users to link and synch data from a Cayuse Proposal into a PDRF to reduce duplicate data entry and make sure data is consistent between systems.

This release also delivers a couple of other big ticket items including the following:

- New GDPR questions to comply with the new EU law
- Ability for users to submit system feedback
- Upgraded & consistent "Start Transaction" across application
- Redesign of the "Other Agreement Log" transaction
- Ability to track FAR clauses in the Terms & Conditions

The release also includes a number of smaller enhancements and bug fixes.

Release Resources

- [Linking a Cayuse 424 Proposal to a PDRF User Guide](#)
- ORA Brown Bag Session: Tuesday, June 12, 2018, 11:30 am to 1:00 pm: [New SeRA-Cayuse Integration](#)

NOTE: Following each SeRA release it’s necessary to clear your internet browser cache and cookies. The following simultaneous key strokes will clear the respective browsers. Once the browser is cleared, close and re-open the browser, then open a new SeRA session.

- Mozilla Firefox – Ctrl + Shift + Delete
- Internet Explorer – Ctrl + Shift + Delete
- Safari iOS – Ctrl + Alt + e
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Cayuse 424 / PDRF Integration

There is now an ability to take data entered on your Cayuse application and populate it into the SeRA PDRF without duplicate entry! The option to link a Cayuse application is available at all stages of the PDRF and can be started on new or in progress PDRFs.

**Linking a Cayuse 424 proposal while starting a PDRF**

When starting a PDRF there is a new question ‘Do you want to link to a Cayuse application?’ If yes is selected, a new field titled Cayuse Proposal ID will display.

From the Cayuse proposal, click the icon on the top of the page. Enter that into the ‘Cayuse Proposal ID’ field in the Start Transaction window in SeRA.

Note: Make sure the proposal in Cayuse is the same type as the one in SeRA. If the Cayuse proposal has an existing link to a PDRF, it will not be available to link again.

After clicking ‘Start’ a series of windows will display to verify the information being pushed into the PDRF.
Verify Sponsor

Verify the Sponsor listed in the ‘Push to PDRF’ column is the correct SeRA Sponsor. If you are synching the data between Cayuse & SeRA at a later point in time, the current PDRF sponsor will show in the ‘PDRF Sponsor’ column.

Verify Personnel

Personnel listed on the Cayuse proposal RR Key Persons form page who have an associated SUNet ID, will show in the personnel pop-up. Some roles will default to their associated SeRA PDRF role. For all others, select the role from the drop-down so they can be properly set in SeRA. Verify the department for each individual is correct and change if needed. De-select the ‘Push to PDRF’ column prior to continuing for faculty who should not be added to the PDRF.
Verify Subawards

If a subaward budget is linked in Cayuse, the subrecipient will show in this screen. The system will try to match subaward institutions, but if there is no match, the subrecipient institution will need to be selected for the PDRF.

If Subaward Institution does not map, select correct one to enter on SeRA PDRF. De-select if subaward should not be listed on PDRF.
Project Info

Additional project information will pull from the Cayuse application and show here. If you are synching the data between Cayuse & SeRA at a later point in time, the current PDRF data will show in the ‘PDRF Data’ column.

Once all information has been reviewed, click Finish. The system will land users into the PDRF transaction and the remaining fields can be completed.

Refresh

Changes made on the Cayuse proposal can be updated into the SeRA PDRF using the Refresh feature. From the Admin and Sponsor Details page, click “Refresh.” The system will refresh using the existing linked Cayuse proposal ID.

The system will open the same wizard pages and compare data currently listed in the PDRF to what is on the Cayuse proposal. Depending on state of PDRF (prepare, major edit, I/O Review) some fields will not
update automatically and will require manual updates. Look for the messages in red text to signify when manual updates are required.

<table>
<thead>
<tr>
<th>Cayuse Funding Agency</th>
<th>PDRF Sponsor</th>
<th>Push to PDRF</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Institutes of Health</td>
<td>National Science Foundation (NSF)</td>
<td>Manual update required</td>
</tr>
</tbody>
</table>

Sponsor can not be changed on proposal-supplement. Please contact your Institutional Official to correct SeRA prior to starting Supplement.

**Linking a Cayuse 424 proposal to an open PDRF**

If a link was not established at the start of the PDRF, it can be linked from the Admin & Sponsor details page. When the selected submission method is “Cayuse 424,” a “Link Cayuse Application” button will display.

Enter the Cayuse proposal ID as mentioned during Linking Cayuse from Start PDRF.

The system will open the same wizard pages as before to compare and synch the data.

**Tracking #**

Once a Cayuse application has been submitted to Grants.gov, the tracking number assigned will show in the PDRF Transaction Home. The Grants.gov tracking number will be a hyperlink back to the application in Cayuse 424.
Dashboard Changes

If a PDRF has a link to a Cayuse proposal, this can be seen easily on the Dashboard. An additional column is available to be added to the interactive report. Click Actions > Select Columns, move the selection “Cayuse Link” from the Do Not Display to the Display in Report list and click “Apply.” A 🔄 will display when a Cayuse proposal is linked. Clicking the icon will direct users to the proposal in Cayuse.

SeRA Feedback option

SeRA users currently only have an option to open a ServiceNow ticket for bugs and enhancements. There was no feature to provide feedback to the SeRA Team. This new release fills that gap and provides a feature where SeRA distributed users can provide comments and suggestions for the SeRA application. The feedback feature is available under the Help menu.

Consistent “Start Transaction” button across system

The Start Transaction drop-down button has been added as a teal button at the top right of the Proposal Summary page and the Segment Summary page. This now makes the location and look of the “Start
Transaction” option consistent across all pages. As part of this change, a few bugs in this space were fixed and the confirmation messages have been standardized.
Proposals & Awards

New GDPR questions

Two new GDPR compliance questions have been added to the Project Questions page under Data & Materials. These questions will help track projects which need to be monitored for GDPR impacts.
Updated Submission Methods options

In the Admin and Sponsor Details page of Proposal, the Submission methods have been updated. Grants.gov has been removed as one of the options. NSF Research.gov has been added as a new option. The other options and the order of the options has also been changed to make it easier and clearer.

Small Enhancements & Bug Fixes

In this release, we also added a few small enhancements and bug fixes to proposals and awards. These include:

- In the International and Global Business Region of the Project Questions page, the term “In-Country” has been changed to “International” for better clarity.
- The Proposal Intake Form (PIF) Sponsor and Budget Details section now has a link to add a Budget in Word template. The link is to the following URL: http://med.stanford.edu/rmg/forms/Budget_Information_Template_(word).docx
- If a Sponsor or Prime Sponsor selected on the PIF or PDRF is on the Restricted Foundation list, the system will now display warning text providing additional instructions regarding
coordination with Office of University Foundation Relations. (This text was previously displayed in some scenarios, but not all.)

- The message about contacting your IO to add a new sponsor has been changed to display as instructional text (rather than in an information icon) for the sponsor field in the PIF.

Central Office Enhancements

**Other Agreement Log Updates**

**Issues**
The Issues region was updated to make adding issues easier. A date and comment can now be added at time issue is added. New issue called "Privacy" has also been added.

**Negotiation Tracking**
The Negotiation Tracking region was updated to make adding negotiation activities easier. A date and comment can now be added at the same time an activity is selected. New option "Internal Review Requested" has also been added to the list. This option does not affect the Stanford/Party clock or the next available activities.

**Signature Tracking**
The Signature Tracking region was updated to make adding signature activities easier. A date and comment can now be added at the same time an activity is selected.

**Comments**
A new region titled ‘Comments’ was added to the Other Agreement Log. This will allow for general comments about the OAL.

**Remove Validations**
Some fields in the General section of the OAL do not apply for certain agreement types. We have removed validations and these fields are no longer required when completing the OAL.

**New Agreement Type - CRADA**
We have added a new agreement type to the list for selection. The new one is Cooperative Research and Development Agreement (CRADA)

**Sponsor to Party**
The term “Sponsor” has been updated to “Party” throughout the OAL.
**Updated FAR clauses for Award Transactions**

In the Requirements region of the Terms and Conditions page, new FAR clauses were added. We have also re-ordered the list and made minor format changes.

<table>
<thead>
<tr>
<th>Requirements</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>52.219-9: Small Business Subcontracting Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>52.232-20: Limitation of Costs or equivalent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>52.232-22: Limitation of Funds or equivalent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>252.204-7000: Disclosure of Information or equivalent</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Fundamental Research determination made by federal sponsor</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>52.204-21: Basic Safeguarding of Covered Contractor Information Systems</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>252.204-7012: Safeguarding Covered Defense Information and Cyber Incident Reporting</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Distribution Statement A applies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NIST SP 800-171: Protecting Controlled Unclassified Info (CUI) in Non-fed Systems and Organizations</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>52.222-41: Service Contract Labor Standards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>52.222-54: Employment Eligibility Verification (E-Verify)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>52.222-62: Paid Sick Leave Under Executive Order 13706</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

**Small Enhancements & Bug Fixes**

In this release, we also added a few small enhancements and bug fixes to proposals and awards. These include:

- The “Expedited” value in the CT Overall Tracking field on the Transaction Log returned to “Urgent.” A new option of “Expedited” is now available on the list of options.
- The people selector field for the PTA Setup contact on the award has been updated to match the people selector fields throughout the rest of the system.
- Roles & Attributes can now be seen on the main Sponsor Maintenance report.
- The Notice of Award PDF was at times missing the "Special Instructions for Accounting or A/R". This has now been fixed.
- When viewing completed transactions, the system will no longer add any log entry to the proposal transaction log.
- The Hold Back field for AR Collectors will be defaulted to “No” when the invoice is first brought into the system.