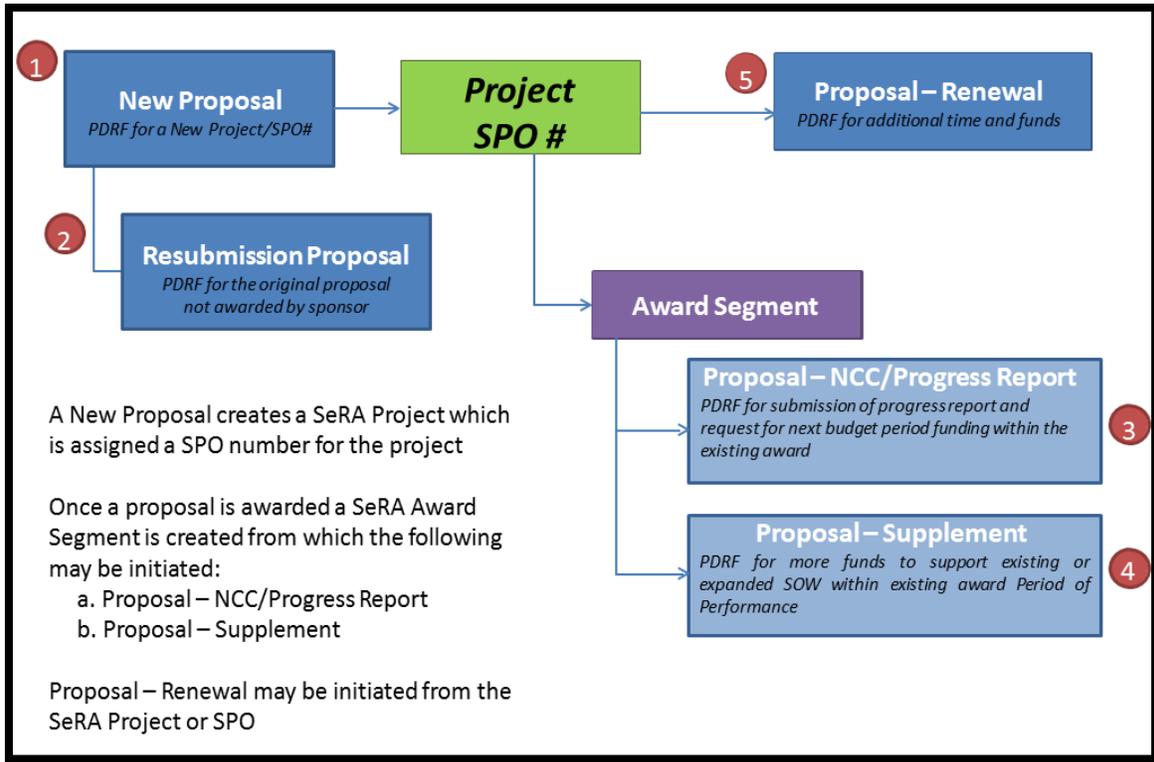
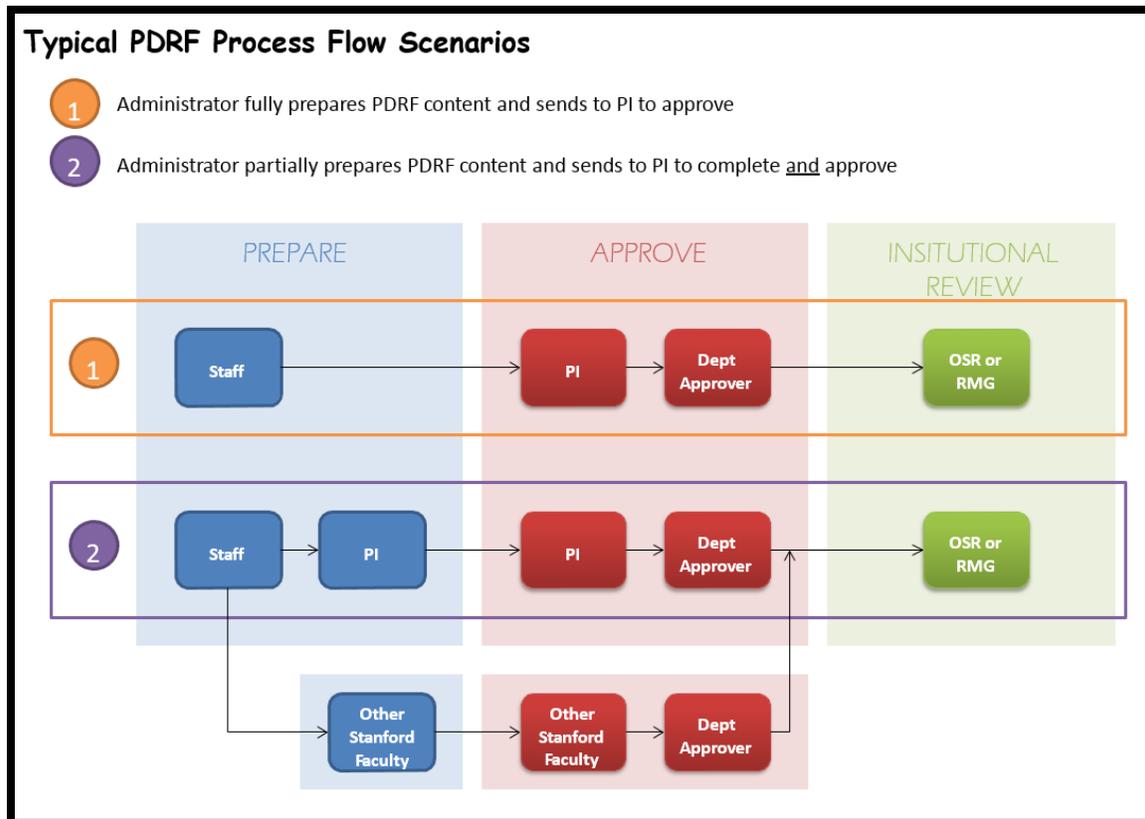


SeRA Proposal Types & System Structure



SeRA Proposal Types & System Structure



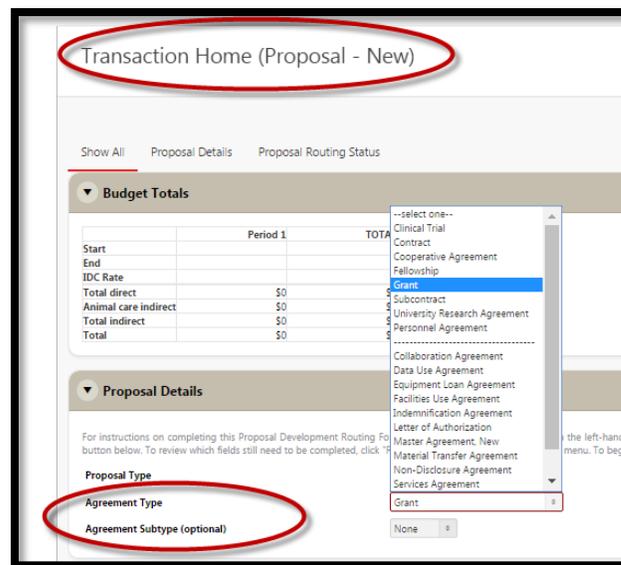
STANFORD ELECTRONIC RESEARCH ADMINISTRATION

Initiating a PDRF for a New Proposal (New Project)

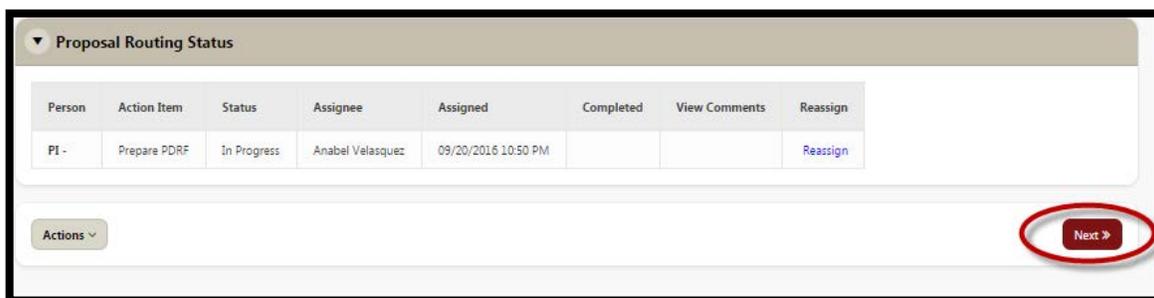
1. Use the “Initiate New Proposal” function when you want to start a proposal transaction for a **new project**.



2. SeRA will automatically take you to the “Transaction Home: Proposal – New” page.
 - Select the appropriate “Agreement Type” from the drop-down menu and an “Agreement Sub-Type” if applicable.



3. Click on the 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

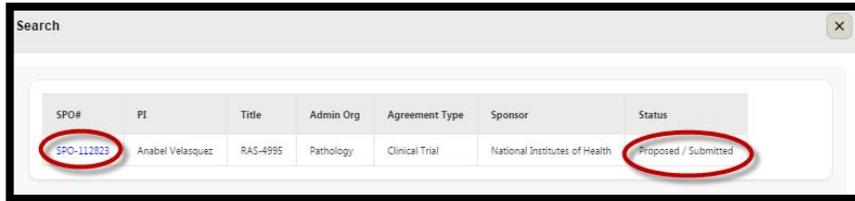
Resubmissions can be processed on Proposals with a “Rejected”, “Withdrawn”, or “Proposed/ Submitted” Status

A. When the proposal status is “Proposed/ Submitted”:

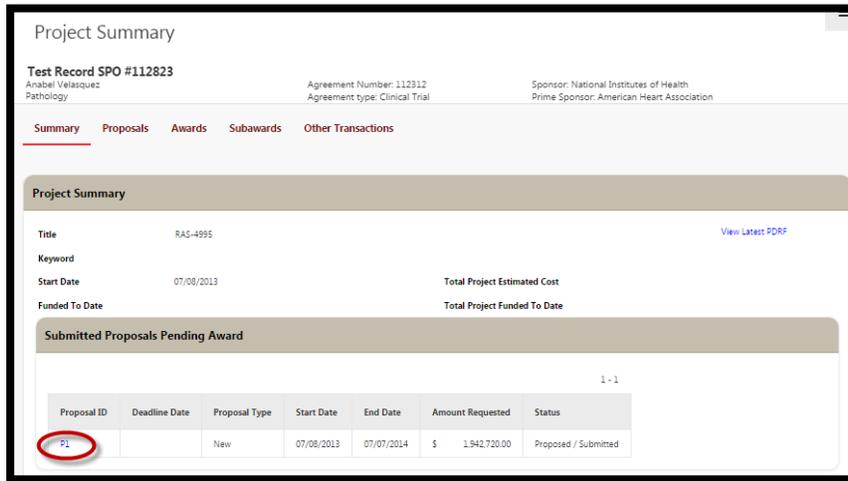
1. Search for the “SPO #”



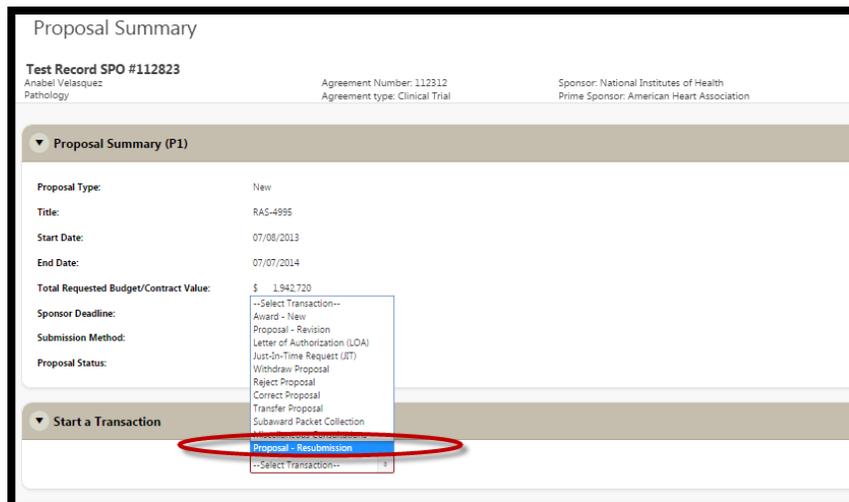
2. Select the “SPO #” from the “Search” window to proceed to the “Project Summary” page



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



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



Initiating a PDRF for a Resubmission (cont'd)

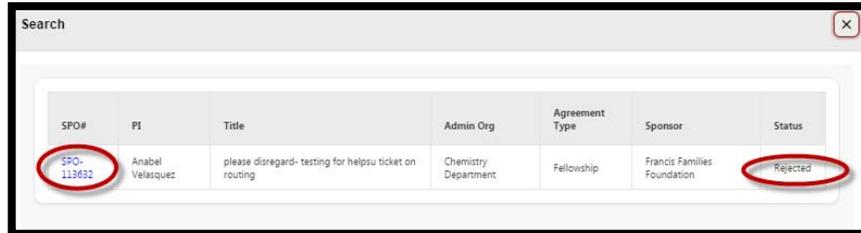
B. When the proposal status is "Rejected" or "Withdrawn":

1. Search for the "SPO #"



A search window with a red border. It contains a label "Search:" followed by a dropdown menu showing "SPO #" and a text input field containing "113632".

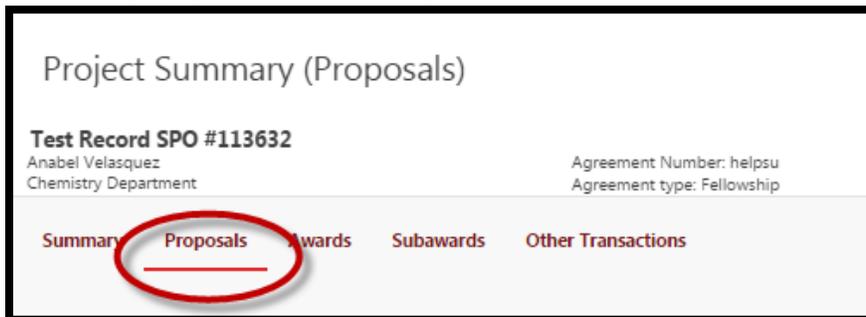
2. Select the "SPO #" from the "Search" window to proceed to the "Project Summary" page



A search results window titled "Search" with a close button. It contains a table with the following data:

SPO#	PI	Title	Admin Org	Agreement Type	Sponsor	Status
SPO-113632	Anabel Velasquez	please disregard- testing for helpsu ticket on routing	Chemistry Department	Fellowship	Francis Families Foundation	Rejected

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



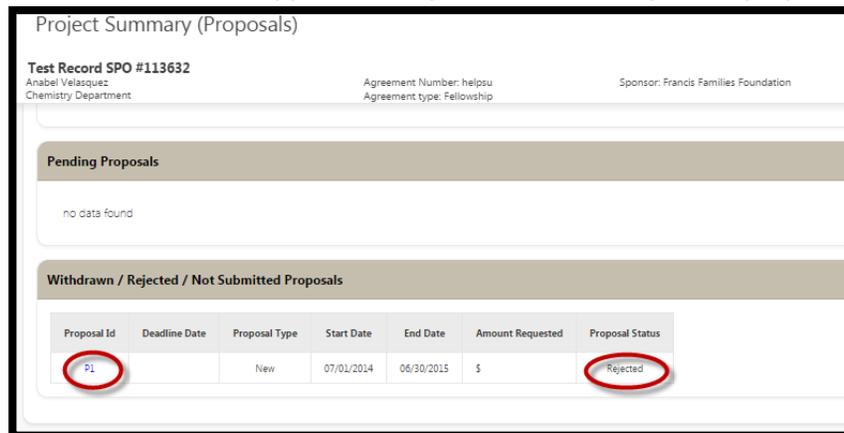
Project Summary (Proposals)

Test Record SPO #113632
Anabel Velasquez
Chemistry Department

Agreement Number: helpsu
Agreement type: Fellowship

Summary **Proposals** Awards Subawards Other Transactions

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



Project Summary (Proposals)

Test Record SPO #113632
Anabel Velasquez
Chemistry Department

Agreement Number: helpsu
Agreement type: Fellowship

Sponsor: Francis Families Foundation

Pending Proposals

no data found

Withdrawn / Rejected / Not Submitted Proposals

Proposal Id	Deadline Date	Proposal Type	Start Date	End Date	Amount Requested	Proposal Status
PI		New	07/01/2014	06/30/2015	\$	Rejected

5. On the "Proposal Summary" page, select "Proposal – Resubmission" from the "Start a Transaction" menu



Start a Transaction

--Select Transaction--

--Select Transaction--
Award - New
Award - Resubmission
Proposal - Resubmission

Proposal History

Initiating a PDRF for a Non-Competing Continuation/ Progress Report

1. Search for the "SPO #"



A search window with a dropdown menu labeled "SPO #" and a text input field containing "112296".

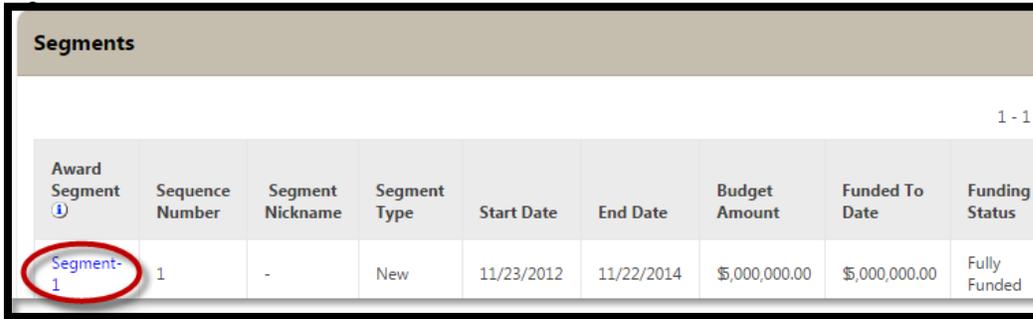
2. Select the "SPO #" from the "Search" window to proceed to the "Project Summary" page



A search results window titled "Search" containing a table with the following data:

SPO#	PI	Title	Admin Org	Agreement Type	Sponsor	Status
SPO-112296	Anabel Velasquez	Testing RAS-4696	Office of Sponsored Research	Fellowship	Coherent, Inc.	Awarded (11/23/2012 - 11/22/2014)

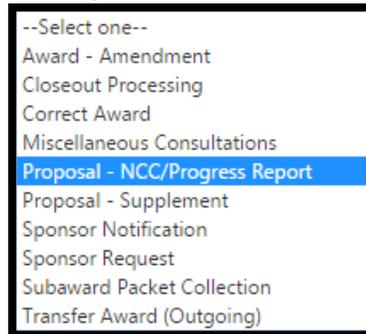
3. Select the applicable Award Segment that the Non-Competing Continuation proposal is associated with



A segments window titled "Segments" containing a table with the following data:

Award Segment	Sequence Number	Segment Nickname	Segment Type	Start Date	End Date	Budget Amount	Funded To Date	Funding Status
Segment-1	1	-	New	11/23/2012	11/22/2014	\$,000,000.00	\$,000,000.00	Fully Funded

4. Select "Proposal – NCC/ Progress Report" from the "Start a Transaction" menu



A dropdown menu titled "--Select one--" with the following options:

- Award - Amendment
- Closeout Processing
- Correct Award
- Miscellaneous Consultations
- Proposal - NCC/Progress Report
- Proposal - Supplement
- Sponsor Notification
- Sponsor Request
- Subaward Packet Collection
- Transfer Award (Outgoing)

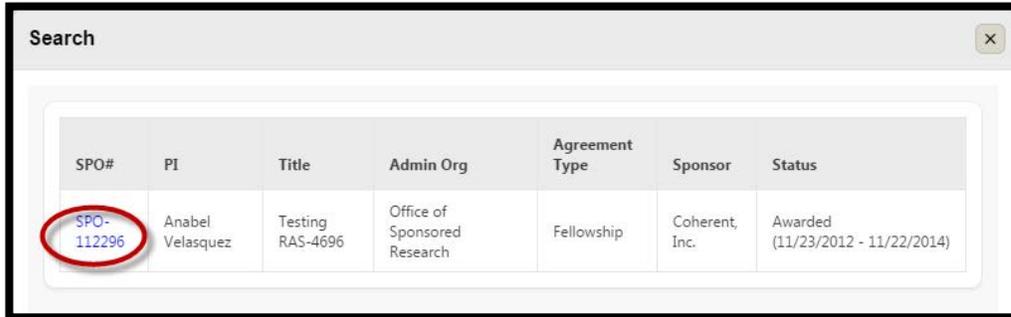
Initiating a PDRF for a Supplement

1. Search for the "SPO #"



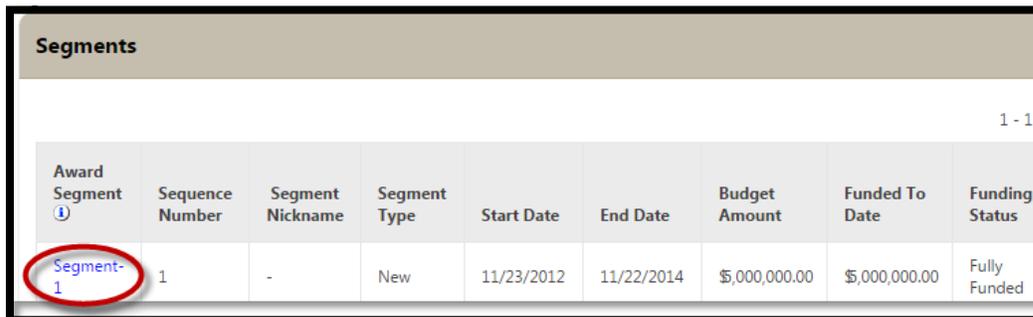
Search: SPO # 112296

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



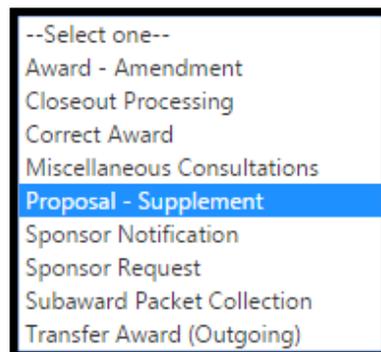
SPO#	PI	Title	Admin Org	Agreement Type	Sponsor	Status
SPO-112296	Anabel Velasquez	Testing RAS-4696	Office of Sponsored Research	Fellowship	Coherent, Inc.	Awarded (11/23/2012 - 11/22/2014)

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



Award Segment	Sequence Number	Segment Nickname	Segment Type	Start Date	End Date	Budget Amount	Funded To Date	Funding Status
Segment-1	1	-	New	11/23/2012	11/22/2014	\$,000,000.00	\$,000,000.00	Fully Funded

4. Select "Proposal – Supplement" from the "Start a Transaction" menu



- Select one--
- Award - Amendment
- Closeout Processing
- Correct Award
- Miscellaneous Consultations
- Proposal - Supplement
- Sponsor Notification
- Sponsor Request
- Subaward Packet Collection
- Transfer Award (Outgoing)

Initiating a PDRF for a Renewal

1. Search for the "SPO #"



A search window with a dropdown menu labeled "SPO #" and a text input field containing "112296".

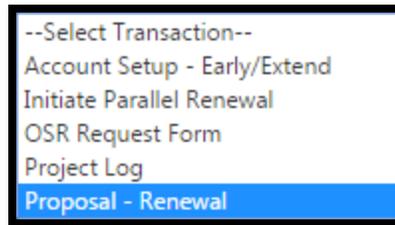
2. Select the "SPO #" from the "Search" window to proceed to the "Project Summary" page



A search results window titled "Search" containing a table with the following data:

SPO#	PI	Title	Admin Org	Agreement Type	Sponsor	Status
SPO-112296	Anabel Velasquez	Testing RAS-4696	Office of Sponsored Research	Fellowship	Coherent, Inc.	Awarded (11/23/2012 - 11/22/2014)

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



A dropdown menu titled "--Select Transaction--" with the following options: Account Setup - Early/Extend, Initiate Parallel Renewal, OSR Request Form, Project Log, and Proposal - Renewal (highlighted in blue).