### SeRA Proposal Types & System Structure



## SeRA Proposal Types & System Structure



### 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.

	Stanf	ord Electronic Rese	arch Admi	nistration		
# Home	~	M. Dashhar	a d			
+ Initiate New Proposal		My Dashboa	ard T			
📶 Reports	~	CLICK HERE	trojects	Pineline	Proposals	My Accounts
C Subawards	L		Jiojeco	ripeine	rioposais	ing Accounts
C eCertification						
DC Waivers		My Action Items				
Cavuse 424	8	Listed below are all of the	Items that are o	currently assign	ed to you for act	tion. Click on the blue lin

- 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.

Show All Propo	sal Details Proposal Ro	uting Status
Rudget Total	le	
- budget rota	5	
		Clinical Trial
	Period 1	TOTA
Start		Cooperative Agreement
End		Fellowship
IDC Rate		Grant
Total direct	\$0	Subcontract
Animal care indirect	\$0	University Research Agreement
Total indirect	\$0	Personnel Agreement
Total	\$0	ss
		Collaboration Agreement
		Data Use Agreement
Proposal Dat	alle	Equipment Loan Agreement
· rioposal Det	ans	Facilities Use Agreement
		Indemnification Agreement
Fact in the state of the state	- Internet in this December 2010	Letter of Authorization
Por instructions on con	npieting this Proposal Developh wwbich fields still pood to be se	moleted click "P Master Agreement, New
button below. To revier	www.crimenus.scill need to be co	Material Transfer Agreement
		Non-Disclosure Agreement
Proposal lype		Sanvicat Agreement
Proposal Type		pervices Agreement

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Resubmissions can be processed on Proposals with a "**Rejected**", "Withdrawn", or "Proposed/ Submitted" Status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. <u>When the proposal status is "Proposed/ Submitted":</u>
- 1. Search for the "SPO #"



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

SPO#	PI	litle	Admin Org	Agreement Type	Sponsor	Status	
SPO-112823	Anabel Velasquez	RAS-4995	Pathology	Clinical Trial	National Institutes of Health	Proposed / Submitted	

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

Project	Summai	ry						_
Test Record Anabel Velasque: Pathology	SPO #1128	23		Agreemen Agreemen	: Number: 1123: : type: Clinical Ti	12 rial	Sponsor: National Instit Prime Sponsor: America	utes of Health an Heart Association
Summary	Proposals	Awards	Subawards	Other Trai	nsactions			
Project Sum	mary							
Title		RAS-4995						View Latest PDRF
Keyword								
Start Date		07/08/201	3			Total Project Estimation	ated Cost	
Funded To Dat	e					Total Project Funde	ed To Date	
Submitte	d Proposals	Pending A	Award					
							1-1	
Proposal	ID Deadlin	e Date	Proposal Type	Start Date	End Date	Amount Requested	Status	
	)		New	07/08/2013	07/07/2014	\$ 1,942,720.00	Proposed / Submitted	
								)

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

Proposal Summary		
Test Record SPO #112823 Anabel Velasquez Pathology	Agreement Number: 112312 Agreement type: Clinical Trial	Sponsor: National Institutes of Health Prime Sponsor: American Heart Association
Proposal Summary (P1)		
Proposal Type:	New	
Title:	RAS-4995	
Start Date:	07/08/2013	
End Date:	07/07/2014	
Total Requested Budget/Contract Value:	\$ 1,942,720	
Sponsor Deadline:	Select Transaction Award - New	
Submission Method:	Proposal - Revision Letter of Authorization (LOA)	
Proposal Status:	Just-In-Time Request (JIT) Withdraw Proposal	
	Reject Proposal Correct Proposal	
<ul> <li>Start a Transaction</li> </ul>	Transfer Proposal Subaward Packet Collection	
$\sim$	Proposal - Resubmission	
	Select Transaction 0	

## Initiating a PDRF for a Resubmission (cont'd)

- B. When the proposal status is "Rejected" or "Withdrawn":
- 1. Search for the "SPO #"

Resubmit

- Search: SPO # 113632
- 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-	Anabel	please disregard- testing for helpsu ticket on	Chemistry	Fellowship	Francis Families	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 wards Subawards	Other Transactions

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

Project Summary (Pr	oposals)				
Test Record SPO #113632 Anabel Velasquez Chemistry Department		Agre Agre	ement Number: ement type: Fell	helpsu owship	Sponsor: Francis Families Foundation
Pending Proposals					
no data found					
Withdrawn / Rejected / Not	Submitted Prop	osals			
Proposal Id Deadline Date	Proposal Type	Start Date	End Date	Amount Requested	Proposal Status
	New	07/01/2014	06/30/2015	\$	Rejected

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

Start a Transaction	
	Select Transaction 8 Select Transaction Avard - New
Proposal History	Proposal - Resubmission

## STANFORD ELECTRONIC RESEARCH ADMINISTRATION

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

- 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 Non-Competing Continuation proposal is associated with

Segments	;							
								1 - 1
Award Segment (i)	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	\$5,000,000.00	\$5,000,000.00	Fully Funded

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



# STANFORD ELECTRONIC RESEARCH ADMINISTRATION

#### **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

Segments	;							
								1 - 1
Award Segment (1)	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	\$5,000,000.00	\$5,000,000.00	Fully Funded

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



# STANFORD ELECTRONIC RESEARCH ADMINISTRATION

### **Initiating a PDRF for a Renewal**

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

