Creating Fellowship Proposal Development & Routing Forms (PDRFs) in SeRA – QUICK GUIDE

Overview

This quick guide describes how to create the following Fellowship PDRF types in SeRA:

- New Fellowship PDRF
- Non Competing Continuation Fellowship PDRF
- Resubmission Fellowship PDRF

Please note, this quick guide does not walk through the process of actually filling out the PDRF and should be used as a guide to navigate the SeRA system in order to launch your particular type of PDRF. Separate PDRF-specific quick guides will be available through the SeRA website.

SeRA supports the following web browsers:

- Firefox 3.x
- Internet Explorer 7.x
- Safari 3.x

Technical or application support may be requested through a HelpSU Ticket and general feedback may be provided to the SeRA team using the sera-support@lists.stanford.edu mailing list.

Temporary Updates to SeRA Homepage

In order to support PDRFs which were started in the original version of SeRA and significant upgrades over the original PDRF, we have had to make some temporary changes to the SeRA homepage. There are now two versions of the SeRA Dashboard – My Dashboard Version 1 and My Dashboard Version 2

**My Dashboard Version 1:** This is the page staff and faculty will use to manage Non-Fellowship PDRFs created in the original version of SeRA.

**My Dashboard Version 2:** This is the page staff and faculty will use to create and manage new PDRFs (including Fellowships). This is also the page which will allow you to access Proposal and Award information now available in the new version of SeRA

Eventually, we will merge the two separate SeRA Dashboards into a single page. Below is an example of what the new SeRA Homepage will look like:
Creating a New Fellowship PDRF

A New Fellowship PDRF can be created directly from your SeRA Dashboard using the following steps:

1. Launch SeRA (https://sera.stanford.edu) and login to My Dashboard Version 2

2. Click Initiate New Proposal in the left column navigation

3. SeRA will automatically take you to the Proposal Summary: Process Proposal - New page
   a. Select Fellowship from the Agreement Type drop down list
   b. Proceed with filling out the New Fellowship PDRF by clicking PI & Project Location at the bottom of the form
Proposal Summary
Process Proposal - New

Title: 
Start Date: 
End Date: 
Total Requested Budget: $0
Sponsor Deadline: 
Submission Method:

<table>
<thead>
<tr>
<th>Period</th>
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Proposal Type:
Agreement Type:

Status: 
Assignee: Nelson, William J
Assigned: 08-Mar-2011 11:00AM
Completed: Reassign

Next: >PI & Project Locations
Creating a Non Competing Continuation Fellowship PDRF

A Non Competing Continuation (NCC) Fellowship PDRF is related to an existing Award Transaction and can be created from the Award Summary: Segment page using the following steps:

1. Launch SeRA (https://sera.stanford.edu) and login to My Dashboard Version 2

2. Find the existing Research Project by searching for the SPO# in the Quick Search box or performing an Advanced Search (upper right hand corner of screen)

3. SeRA will display the Project Summary page
   a. Click the Award Segment number to drill down to the Award Summary: Segment page

4. SeRA will display the Award Summary: Segment page
   a. Select Process Proposal – Non Competing Continuation from the drop down list near the middle of the form
   b. Click the Yes button on the confirmation pop-up box
5. SeRA will display the Transaction Home page
   a. Check the box under the Period of Performance which applies to this NCC Fellowship PDRF
   b. Proceed with filling out the NCC Fellowship PDRF by clicking Fellow & Project Location at the bottom of the form
TRANSACTION HOME
Process Proposal - Non Competing Continuation

Title: Psychosomatic effects of Stanford University’s dominance within Pac-12 Conference Athletics

Start Date: [Insert Start Date]
End Date: [Insert End Date]
Total Requested Budget: $0
Sponsor Deadline: [Insert Sponsor Deadline]
Submission Method: [Insert Submission Method]

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Status: Fully Funded
Anticipated

INSTRUCTIONS:
1. Select the applicable non-competing continuation period above
2. Click “Next >>Fellow & Project Locations” below to continue

To Complete this PDF:
- Use the left-hand navigation, or the page-bottom links to move through the form
- Click Check for Errors in the Actions menu to see what fields need to be completed
- When the form is complete, click Review & Approve this PDF and then follow the instructions at the top of the page

Proposal Type: Non-Competing Continuation
Agreement Type: Fellowship

PROPOSAL ROUTING STATUS

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<tr>
<th>Action Item</th>
<th>Status</th>
<th>Assignee</th>
<th>Assigned Date</th>
<th>Completed Date</th>
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Next >> Fellow & Project Locations
Creating a Resubmission Fellowship PDRF

A Resubmission Fellowship PDRF is related to an existing Proposal Transaction and can be created from the Proposal Summary page using the following steps:

1. Launch SeRA (https://sera.stanford.edu) and login to My Dashboard Version 2

2. Find the existing Research Project by searching for the SPO# in the Quick Search box or performing an Advanced Search (upper right hand corner of screen)

3. SeRA will display the Project Summary page
   a. Click the Proposal ID to drill down to the Proposal Summary page

4. SeRA will display the Proposal Summary page
   a. Select Process Proposal – Resubmission from the drop down list near the middle of the form
   b. Click the Yes button on the confirmation pop-up box
   * Please Note – SeRA will automatically “Reject” the original PDRF and create the Resubmission Fellowship PDRF
5. SeRA will display the Transaction Home page
   a. Proceed with filling out the Resubmission Fellowship PDRF by clicking Fellow & Project Location at the bottom of the form
Step 5a

Title: Psychosomatic effects of Stanford University’s dominance within Pac-12 Conference Athletics
Start Date: 
End Date: 
Total Requested Budget: $ 0
Sponsor Deadline: 
Submission Method: 

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Proposal Type:
Agreement Type:

PROPOSAL ROUTING STATUS

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Next >> Follow & Project Locations

Step 5a