

PDRF Instructions

Proposal Development Routing Form (PDRF)

- Postdocs applying for fellowship funding are required to complete a Proposal Development Routing Form (PDRF) in SeRA. The PDRF captures information necessary for proposal review and endorsement by Stanford University. The PDRF also documents the approvals required (department, Mentor, Institutional Official, etc.) for submission of a proposal.
- PDRF attachments should include:
 - Copy of the Sponsor program announcement
 - Scientific Summary/Abstract
 - Budget Detail
 - Final completed proposal

Initiate a PDRF for a New Fellowship

- PDRFs are initiated through [SeRA](#), under the “My Projects” tab
- Select “Start School of Medicine Proposal” in the top right corner, and then select SoM Post-Doc Fellowship from the drop-down menu
- Do you want to link to a Cayuse application: Defaults to “No.” Click Start

Fellow & Project Location

- Fellow: Type the first 3 letters of the fellows last name or SUNet ID to populate and select from the name list.
- Fellow status: Click to select status from the drop-down list
- Registered at Stanford University: Click to select Yes or No from the drop-down list
- Citizenship: Click and select Citizenship type from the drop-down list
- Faculty/Mentor: Type the first 3 letters of the Faculty/Mentor last name or SUNet ID to populate and select from the name list.

Fellow & Project Location (Proposal - New)

SPO #243855

Agreement Type: Fellowship

[Show All](#) Fellow & Faculty Mentor Project Location

▼ Fellow & Faculty Mentor

Fellow *	<input type="text"/>
Fellow Status *	Postdoctoral ▼
Registered at Stanford University? *	Yes ▼
Citizenship *	Citizen ▼
Faculty Mentor *	<input type="text"/>

▼ Project Location

List the locations where work for this project will be conducted. *

Add Location

Fellow & Project Location

- In the Project Location field, type the first 3 characters of the building name to populate the building list
 - If your building is not listed, please utilize the Other Location field
 - Room: Enter room # where project will be conducted
 - Other Location: Enter Building and Room #

Fellow & Project Location (Proposal - New)

SPO #243855

Agreement Type: Fellowship

[Show All](#) Fellow & Faculty Mentor Project Location

▼ Fellow & Faculty Mentor

Fellow *	<input type="text"/>
Fellow Status *	Postdoctoral ▼
Registered at Stanford University? *	Yes ▼
Citizenship *	Citizen ▼
Faculty Mentor *	<input type="text"/>

▼ Project Location

List the locations where work for this project will be conducted. *

Add Location

Admin & Sponsor Details

- Proposal Start Date: Enter anticipated project start date (found in Funding Announcement)
- Proposal End Date: Enter anticipated project end date (depends on start date and duration of fellowship)
- Project Activities: Select Research, On Campus. (If applicable click off campus).
- Proposal Title: Enter Proposal Title
- Department Lab/Institute submitting proposal: Enter the department where work will be conducted
- Please note: Proposal Nickname is not required

▼ Administrative Details

Proposal Start Date *

Proposal End Date *

Project Activities *(Choose all that apply)* *

☒ Research

☒ On Campus

☐ Off Campus

☐ Training/Instruction

☐ Other Sponsored Activity

Proposal Title *

Proposal Nickname

Department/Lab/Institute Submitting Proposal *


Admin & Sponsor Details

- Department Contact: The name entered in this field will become an automatic approver for the PDRF. Please enter **Chantanee Saejao**
- Department PTA set up contact: Enter the Department accountant who will manage the award should this be funded. Please enter **Helen Lei**

▼ Project Contacts


Department Contact

Chantanee Saejao (csaejao) ▼

Email: csaejao@stanford.edu Phone: (650) 721-2610 

Department PTA Setup Contact *

Helen Lei (hlel) ▼

Email: hlei@stanford.edu Phone: 

▼ Sponsor Details

Sponsor *

▼ ?


Sponsor Reference Number

?

Sponsor Deadline *

Yes No

Requested Completion



Submission Method *

--Select Submission Type-- ▼

☐ Check this box to enter sponsor mailing address

☐ Check this box to enter sponsor budget contact information

Is this proposal in response to a solicitation (e.g. Program Announcement, RFP, BAA)? *

Yes No

Admin & Sponsor Details

Please Note: A sponsor is the funding organization (e.g., NIH, DOD, AHA, etc.)

- Sponsor Details: Please select the sponsor for your fellowship application
- Sponsor Deadline: Indicate if there is a sponsor deadline
 - If yes, enter the sponsor deadline date, time, and relevant time zone. The PDRF will calculate the Internal Deadline
- Submission Method: Select the appropriate submission method from the dropdown menu
 - If the submission method will be paper or email [by your institutional official] provide the sponsor contact name & contact information
- Solicitation: Indicate if this proposal is in response to a solicitation (e.g., Program Announcement, RFP, BAA, FOA etc.)

▼ Sponsor Details

Sponsor *

▼

?

Sponsor Reference Number

?

Sponsor Deadline *

Yes

No

Date *

?

Time *

05:00 PM

Time Zone *

--Time Zone--

▼

e.g. 11/25/2010

e.g. 05:00 PM

0 Business Days until Sponsor Deadline. Does not account for Stanford holidays or non-business days

Internal Deadline

?

Requested Completion

?

Submission Method *

--Select Submission Type--

▼

☐ Check this box to enter sponsor mailing address

☐ Check this box to enter sponsor budget contact information

Is this proposal in response to a solicitation (e.g. Program Announcement, RFP, BAA)? *

Yes

No

Funding Opportunity

Opportunity #

Opportunity URL

Enter opportunity #, copy/paste URL, or [attach guidelines](#) (Category: Program Guidelines, Subcategory: Program Guidelines)

Are there restrictions on non-U.S. citizen participation? *

Yes

No

Are there restrictions on publication or dissemination of research results? *

Yes

No

Budget Questions

- Amount requested: Leave Blank
 - This will be auto filled from the budget details tab
- Requested Indirect Cost Rate (%): Enter '0'
- Does ISC Apply: Select 'Yes'
- ISC is included in the proposal budget (to be paid by Sponsor): Select 'No'
- ISC will be covered by Department or School: Select 'YES'
- Provide an Unrestricted PTA: Enter TBD @ Time of Award

Budget Information

Amount Requested *

Indirect Costs (IDC)

Requested Indirect Cost Rate (%) *

0

If multiple rates, separate with commas

Does ISC Apply? *

YesNo

In accordance with [Administrative Guide Memo 37.3](#), the Infrastructure Charge(ISC) of 8% is required on non-government sponsored project funds that carry on F&A rate of 0%.

Please identify the source of ISC for this project.

Not sure? Please contact either the [Office of Sponsored Research](#) or the School of Medicine [Research Management Group](#).

ISC is included in the proposal budget (to be paid by Sponsor) *

YesNo

ISC will be covered by a Department or School? *


YesNo

Provide a non-restricted PTA *

Budget Details

- Enter a Start date for Budget Period 1, then click on Auto Fill. The system will auto-populate start and end dates.
- Enter Stipend amount for each year of the project. Please use the Fellowships tab under the [CVI Research Development website](#) to determine your annual stipend
- Enter Institutional allowance for each year of the project. Dependent on the Funding Announcement
- Enter “Other Costs” for each year of the project. Dependent on the Funding Announcement

Rate Schedule 1

Activity: Organized Research (On Campus) 


+ Add a period


Auto Fill

Starts:

Ends:

Period 1

Period 2 

Period 3 

Total

Period 1

Period 2

Period 3

Total

Student Stipends 57000-Student Aid	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ 0
Institutional Allowance 58501-Interdept Costs Other	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ 0
Other 50001-Unallocated Exp	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ 0
BUDGET TOTAL	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ 0

Project Questions

- Compliance - Indicate (Y/N) if this project involves any of the following:
 - Animal Subjects (APLAC)
 - Human Subjects (IRB)

Human Subjects

- Does this study meet the NIH definition of a clinical trial, regardless of funding source?
 - If yes, answer → Is the Stanford Investigator responsible for registering through ClinicalTrials.gov?

Does this project involve the following (at Stanford or any subrecipient sites): ?

Animal Subjects (APLAC) *

Yes

No

No Protocols Added.

Add APLAC

Refresh

No Comments Added.

+ Add Comment

Human Subjects (IRB) *

Yes

No

If you have submitted a protocol, please add it below.

No Protocols Added.

Add IRB

Refresh

No Comments Added.

+ Add Comment

Does this study meet the NIH definition of a clinical trial, regardless of funding source? *

Yes

No

Will you be enrolling participants outside of the United States? *

Yes

No

Will Clinical and Translational Research Unit (CTRU) Services be utilized? *

Yes

No

Will Lucas Center services be utilized? *

Yes

No

Project Questions

- Will you be enrolling participants outside of the United States?
 - If yes, and if this project is awarded, the project will need insurance coverage through Risk Management
- Budget & Billing Workbook used for patient care costs?
 - If yes, a billing & budget workbook is required. Attach workbook (Category: Detailed Budget & Justification, Subcategory: Budget & Billing Workbook)
- Will Clinical and Translational Research Unit (CTRU) Services be utilized?
- Will Lucas Center services be utilized?

Human Subjects (IRB) *

☒ Yes ☐ No

If you have submitted a protocol, please add it below.

No Protocols Added.

No Comments Added.

+ Add Comment

Does this study meet the NIH definition of a clinical trial, regardless of funding source? *

☐ Yes ☐ No

Will you be enrolling participants outside of the United States? *

☐ Yes ☐ No

Will Clinical and Translational Research Unit (CTRU) Services be utilized? *

☐ Yes ☐ No

Will Lucas Center services be utilized? *

☐ Yes ☐ No

Project Questions

- Cancer Center Research (SRC)
(conditional - only shows if Human Subjects are marked yes)
- Human Stem Cells (SCRO)

Cancer Center Research (SRC)



Yes

No



No Protocols Added.

Add SRC

No Comments Added.

+ Add Comment

Human Stem Cells (SCRO) *

Yes

No

No Protocols Added.

Add SCRO

Refresh

No Comments Added.

+ Add Comment

Project Questions

- Data/Materials - Indicate if this project involves any of the following at Stanford or subrecipient sites:
 - Genomic Data Sharing: Are you creating, generating, or using large-scale genomic data?
 - GDPR: Indicate if any information (i.e. personal data) relating to an identified or identifiable natural person in the European Economic Area be processed in the performance of this work, either within or outside the EEA and/or transferred into or out of the EEA?

▼ Data/Materials

GDPR: Will any information (i.e. personal data [?]) relating to an identified or identifiable natural person in the European Economic Area (EEA i.e. EU members, Iceland, Liechtenstein and Norway) be:

a. processed (e.g. collected, recorded, stored, used, analyzed, disclosed, published, aggregated, consulted, or destroyed) in the performance of this work, either within or outside the EEA? *

b. transferred into or out of the EEA? *

Questions regarding GDPR? Contact the [University Privacy Office](#) (650-725-1828; privacy@stanford.edu)

▼ Export Control

Stanford research must comply with US export control regulations and university policies, and must be assessed for export license applicability. For guidance refer to the [Export Controls Decision Tree](#) or contact Steve Eisner.

Will the project involve access to: *

- Third-party technical information or software source code that is **disclosure-restricted**
- Items on the [US Munitions List \(ITAR\)](#)? [?]

Will the project involve international shipments or hand carries of equipment, components, materials, or third-party software? *

Sponsor (or Prime Sponsor) Requires Export Control Review

Export Control review will be required prior to proposal submission. The following must be attached prior to routing for approval:

- [Statement of Work](#)
- [Program Guidelines](#)

If you have questions, consult with Stanford's Export Control Officer (steve.eisner@stanford.edu or (650) 724-7072) for guidance prior to submitting this proposal.

Project Questions

- Export Control – Please answer the following Export Control questions

NOTE: Certain Sponsors will trigger an automatic Export Control Review of the proposal, e.g., Department of Defense, DARPA, NASA, etc.

- Indicate if the project involve access to:
 - Third-party technical information or software source code that is disclosure-restricted and/or
 - Items on the US Munitions List (ITAR)?

NOTE: Answering Yes to either of these questions will trigger an Export Control Review of the proposal

- Indicate if the project involve international shipments or hand carries of equipment, components, materials, or third-party software.

▼ Data/Materials

GDPR: Will any information (i.e. personal data [?]) relating to an identified or identifiable natural person in the European Economic Area (EEA i.e. EU members, Iceland, Liechtenstein and Norway) be:

a. processed (e.g. collected, recorded, stored, used, analyzed, disclosed, published, aggregated, consulted, or destroyed) in the performance of this work, either within or outside the EEA? *

b. transferred into or out of the EEA? *

Questions regarding GDPR? Contact the [University Privacy Office](#) (650-725-1828; privacy@stanford.edu)

▼ Export Control

Stanford research must comply with US export control regulations and university policies, and must be assessed for export license applicability. For guidance refer to the [Export Controls Decision Tree](#) or contact Steve Eisner.

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Project Questions

- Please select Yes/No for Research Performed at SLAC
- NOTE: The use of SLAC resources for research activities requires review and approval by SLAC and Stanford administrative departments
- Conflict of Interest: This section is merely to advise you of whether there are any current known conflicts.

▼ SLAC

Research performed at SLAC (excludes data processing and data storage) ? *

Yes

No

SLAC Building *

Describe Location *

(e.g. Beam Time, Lab Space, Office Space)

SLAC resources required to perform research *

Yes

No

Describe Resources *

(e.g. computers, chemicals, lab equipment)

SLAC Officer Review

No Review Details have been recorded.

-

Reviewer Comments

No Comments have been recorded

▼ COI

Investigators and added personnel (*) are required to declare if they have financial interests that reasonably appear to be related to proposed research. [Conflicts of Interest \(COI\)](#) must be disclosed, reviewed, eliminated or managed prior to conducting research (i.e. accepting the award or completing a JIT).

Faculty COI responses will display here once they complete their screening question during the approval.

COI is completed in [OPACS](#). Submit an [OPACS](#) ticket if you need assistance.

Project Questions

- Please select Yes/No for the listed Research Risks
- If "Yes" is selected for Infectious/Biohazardous agents, please select the agents being used
- Unmanned Flights must be approved by Stanford

▼ Research Risks

Does your project include any of the following?

Cancer-related research *

YesNo

Human blood or body fluids *

YesNo

Infectious/Biohazardous agents *

YesNo

Are any **Select Agents?** *

Agents/toxins

Abrin

African horse sickness virus

African swine fever virus

Avian influenza virus

Bacillus anthracis

Bacillus anthracis Pasteur strain

Botulinum neurotoxin producing sp. of Clostridium

Botulinum neurotoxins

Brucella abortus

Brucella melitensis

Agents/toxins used in research

Recombinant DNA molecules *

YesNo

Radiological hazards *

YesNo

Unmanned Flying Vehicles *

YesNo

Flying Activity at Subrecipient Location *

YesNo

Unmanned flights must be approved by Stanford.

An [application](#) will need to be submitted and approved prior to flight activity.

Review the [UFV Policy](#) and submission requirements at section 7 for more information.

Project Questions

- Please select all research focuses that apply to the proposal

▼ Research Focus

Select all that apply (required for SoM)

☒ Disease-related Research

☐ Engineering and Computational Research

☐ Life-Sciences Research

☐ Population- related Research and Healthcare Delivery

☐ Other (for a Research Focus Area that is not listed above)

Proposal & Attachments

- Please attach all required and additional documents in this section
- Click either the Add New Attachment button or from the right-hand Quick Links menu Add Attachment. An Add Attachment dialog box will open
- Select a Category from the dropdown menu options
- Select a subcategory from the dropdown menu options
- Choose your file location
- Add File Tag(s) to help quickly identify the file e.g., "Final Budget"
- Click Attach and repeat steps for each additional attachment

Requested Attachments

Attach any documents that are required by the sponsor and/or will facilitate the review and submission process. For more help, review the [attachment guide](#).

Reason	Attachment Name	File Attached
Proposal	Full Proposal [?]	
Proposal	Internal Detailed Budget	
Proposal	Program Guidelines	
Proposal	Statement of Work	
Proposal	Budget Justification	

Attachments

Files, categories & subcategories denoted by an asterisk are only visible to you

Rows 50

Add Attachment

SPO SPO-243855

Linked Transaction PR886733

Category -- select one-- [?]

Subcategory -- select one -- [?]

Select File(s) *
 Choose Files

Notes

Approvers & Comments

- In the Instructions/ Remarks section, enter any information for approvers and/or your institutional official
- Approvers - PI/Mentor and Department Contact (from the Administrative & Sponsor details page) will be automatically listed
 - In addition, please list Amanda Chase (chaseama@Stanford.edu)
- The PDRF approvals will route in the order listed. You can change the routing order by clicking the Up or Down arrows in the Routing Order column

▼ Instructions/Remarks

▼ Approvers

All default approvers for the PI's department will be listed below if available. Please review and make updates if required. The PDRF will route in the routing order specified.

Routing Order		Name	Email	Approver Type	Delete
1				Mentor	
2		Chantanee Saejao	csaejao@stanford.edu	Dept. Contact	
3	↑ ↓	Amanda Chase	chaseama@stanford.edu	Manually Added	🗑️

Name ▼

Approvers & Comments

- Please list Yamini Dwarakanath (ydwaraka@stanford.edu) under FYI
- Institutional Official
 - Institutional Organization– Select School of Medicine’s Research Management Group
 - Institutional Official – Select Jonathan Gagante from the pick-list

▼ FYI

All default FYIs for the PI's department will be listed below if available. Notification will be sent when all approvals are complete.

Name ↑	Email	Delete
Yamini Dwarakanath	ydwaraka@stanford.edu	

Name

▼ Institutional Official

Select your Contract & Grant Officer or Research Process Manager below.

Institutional Organization *

School of Medicine Research Management Group ▼

Institutional Official *

Jonathan Gagante ▼

Check for Completeness and Submission

- Once all pages of the PDRF are complete, click on Review for Completeness in the Actions column on the right
- Once the review is complete, click Submit for Approval

The screenshot shows a web interface with a table. The table has two columns: 'Original Official' and 'Agreement Type: Fellowship'. Below the table, there is a large grey rectangular area. To the right of the table, there is a sidebar with a section titled 'Actions'. The 'Actions' section contains a list of buttons: 'Save', 'Reassign', 'Review for Completeness', 'Submit for Approval', and 'Terminate'. The 'Review for Completeness' and 'Submit for Approval' buttons are highlighted with a red rectangular border.

Original Official	Agreement Type: Fellowship

Actions

- Save
- Reassign
- Review for Completeness
- Submit for Approval
- Terminate

Check for Completeness and Submission

SPO #243855
Soah Lee
Cardiovascular Institute Operations (VTFZ) vers FYI Institutional Official

Agreement Type: Fellowship

▼ Instructions/Remarks

Completed In Progress

▼ Actions

Save

Reassign

Review for Completeness

Submit for Approval

Terminate