Proposal Development & Routing Form (PDRF): Institutional Review & Approval QUICK GUIDE

The SeRA Proposal Development & Routing Form (PDRF) is a web-based form that replaced the paper SU-42 form. Each PDRF requires review and approval by key University roles. A PDRF requiring your review and approval has been routed to you.

You will need to complete the following PDRF tasks:
1. Review the PDRF and associated attachments
2. Approve and close the PDRF

STEP 1: Access the PDRF
1. Via the E-mail notification sent to you with a clickable link to the PDRF, or
2. Log-on to the SeRA web portal at: sera.stanford.edu, click My Dashboard, and select the PDRF from My Action Items

STEP 2: Review the PDRF and attachments
1. Review the PDRF and proposal attachments by clicking “View full PDRF” and “View Proposal & Attachments” actions located on the right side of the page.
2. Make any needed edits or corrections by clicking “Make edits to form”.
3. If significant edits are needed and require routing the PDRF for re-approval, click on “Return PDRF for re-approval”.
4. Add individuals who require FYI notification of the proposal
5. Enter the assigned SPO number for the proposal
6. Select the applicable “Approval Status”
7. Enter comments if desired

STEP 3: Approve and Close the PDRF
1. Click on “APPROVE AND CLOSE FORM” at the ACTIONS menu or the bottom of the page
2. Check the box: “Check this box to approve Proposal”
3. Click “CONFIRM” at the bottom of the page to confirm approval, or cancel to return to the PDRF

Approval this Proposal