

MYRESEARCH AGREEMENTS TRAINING GUIDE

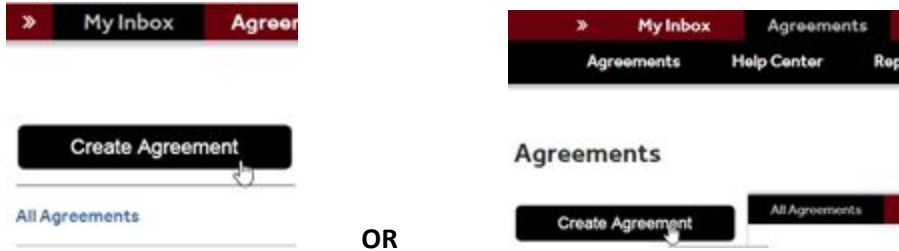
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Submit an Agreement

1. From My Inbox, either click the **Create Agreement** button or click **Agreements** then **Create Agreement**.



2. Complete the pages. To move to the next page, click **Continue**. The questions marked with * are mandatory. Depending on the Agreement type you select under #4, additional SmartForms will be generated with questions specific to the agreement type.

The screenshot shows the 'Agreement Upload' form with the following fields:

- 1. Agreement manager/Principal investigator: [Text input]
- 2. * Agreement creator: PI Name [Dropdown]
- 3. * Upload agreement draft: (or check the box below) [None] [Upload] [Institution to generate first draft?
- 4. * Agreement type: [Dropdown]
- 5. Initial Period Start Date: [Calendar icon]
- 6. Initial Period End Date: [Calendar icon]
- 7. Title: [Text input]
- 8. Funding Proposal Number: [Text input]
- 9. Oracle Award Number, if applicable: [Add] [Oracle Award Number] [There are no items to display]
- 10. Description: [Text area]
- 11. Supporting documents (purchase requisition, budget, scope of work, etc.): [Add] [Name] [There are no items to display]

3. On the last page, click **Finish**.

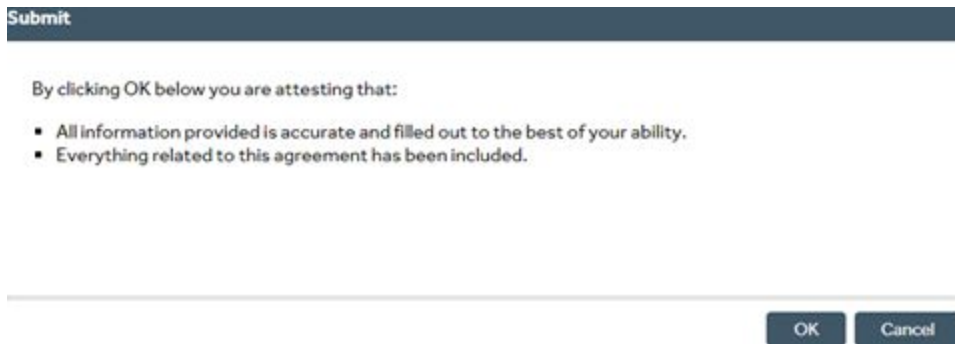
4. On the left, click **Submit**.

Next Steps

- Edit Agreement
- Printer Version
- View Differences
- View All Correspondence

Submit

5. Click **OK** to accept the statement and submit the agreement.



6. The status will change from **Pre-Submission** to **Unassigned**.



Assign an Ancillary Reviewer

You can add an organization or a person as an ancillary reviewer up until you submit the agreement.

1. In the top navigation, click **Agreements**.
2. Click the **All Agreements** tab and then click the agreement name to open it.
3. On the left, click **Manage Ancillary Reviews**.



4. Click **Add**.



5. Next to the **Organization** or **Person**, click **Select** and then choose the specific organization or person. Click **OK**.

1. * Select either an organization or a person as reviewer:

Organization: ...

Person: ...

2. Review type:

- 3. Compliance
- Department
- Export Controls
- Faculty
- IBC
- Office of Technology Licensing
- Other
- Radiation
- RF Legal Office
- Safety
- Scientific

3. * Is a response required?

Yes No [Clear](#)

6. Complete the rest of the form and click **OK**.

7. To add more reviewers, click **OK and Add Another** and repeat the steps.



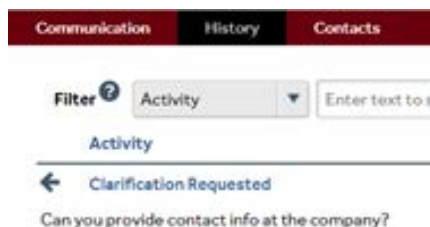
8. Click **OK** when done.

Respond to Reviewer Requests

1. From My Inbox, click the agreement name to open it or sort the screen by **Status, Clarification Requested**.

ID	Name	Agreement	Agreement Type	PI (First)	PI (Last)	Department	Contracting Party	Status	Reviewer	Modified Date
								Status		
								Clarification Requested		

2. In the agreement, click the **History** tab. Look for the **Clarification Requested** activity and review any reviewer comments.



Clarification Requested

3. The status of your agreement will be **Clarification Requested**.

4. To update the agreement, click **Edit Agreement** on the left and make the changes. If not, go to the next step. You will be able to enter a response for the reviewer before submitting.



5. Click **Submit Changes**.

6. (Optional) In the Notes box, type a response to the reviewer's comments or questions.

7. Click **OK**.

Create an Amendment

You can create amendments for agreements in the Active, Expired, and Evergreen states. Only one amendment can be in progress at a time for an agreement.

1. In the top navigation, click **Agreements**.
2. On the **All Agreements** tab, click the name of the agreement to amend.
3. On the left, click **Create Amendment** and complete the pages.

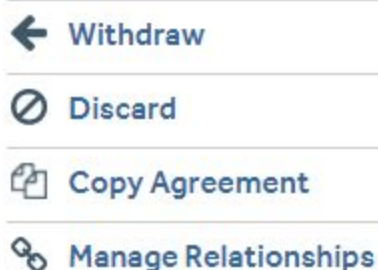


4. On the last page, click **Finish**.
5. On the left, click **Submit**.
6. Click **OK** to accept the statement and submit the amendment.

Additional Actions

You can **withdraw** or **discard** agreements before they become **Active**. Through **Manage Relationships** you can link your agreement to the proposal you submit through **myResearch Grants**.

1. In the top navigation, click **Agreements**.
2. On the **All Agreements** tab, click the name of the agreement to amend. Select the appropriate action which appears on the left side of the screen.



An agreement can be removed from review by clicking **Withdraw** or **Discard**. This action will discontinue the review of the agreement.

Through **Manage Relationships** you can link your agreement to the proposal you submit through **myResearch Grants**. **Note: this function is not yet active in myResearch.**

Workflow and Agreement States

The diagram located in the **Agreements Workspace** will show the state of your agreement within the **Agreements workflow**.

Pre-Submission: During Pre-Submission, the PI (or Agreements Manager) will create the agreement.



Pre-Submission

Unassigned/Clarification Requested: In the Unassigned state, the agreement has been submitted and is reviewed by the Office of Sponsored Programs, who can send the agreement back to the study team for more information or clarifications if needed. The agreement will be assigned to an Agreements Reviewer who is a Grants of Contracts Administrator in OSP.



Unassigned

In Review / Clarification Requested: The Agreements Reviewer completes a thorough review of the agreement, and can send the agreement back to the study team for more information or clarifications if needed.



Internal Review



Clarification Requested

Agreements Module

Signing: During Signing, the agreement is routed for internal and external signatures. Once that is complete, the agreement is activated.



Language Finalized

Routing for Signature

Active: The submission will reach its final determination, Active, after the final signed copy has been uploaded to the system.



Active