MY RESEARCH AGREEMENTS
TRAINING GUIDE

August 2018
Agreements Module

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Submit an Agreement

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

OR

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.

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.

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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.
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.

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**Respond to Reviewer Requests**

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

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

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**.

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**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.

- Withdraw
- Discard
- Copy Agreement
- Manage Relationships

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.
**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.

**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.
Agreements Module

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

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