

# **MYRESEARCH AGREEMENTS 10.5**

## **TRAINING GUIDE**

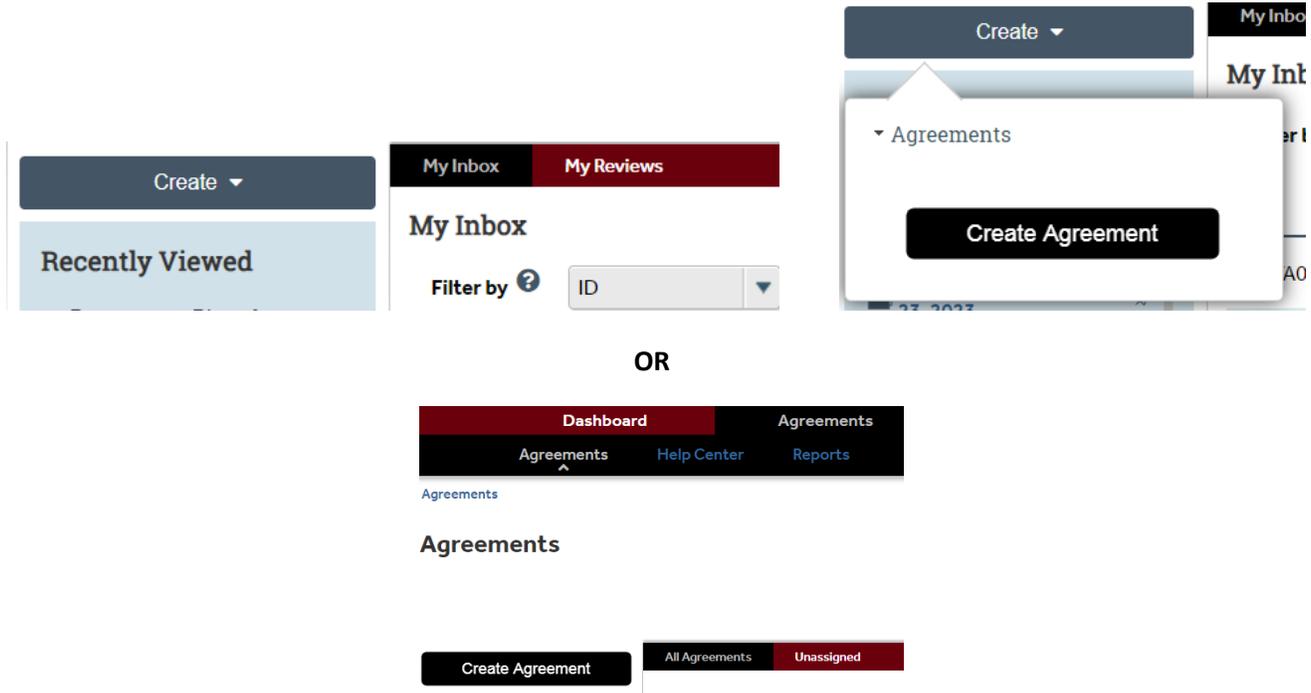
**June 2023**

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# Submit an Agreement

1. From Dashboard, either click the **Create** dropdown and then the **Create Agreement** button or click **Agreements** then **Create Agreement**.



OR



2. Complete all pages. To move to the next page, click **Continue**. The questions marked with \* are mandatory. Depending on the Agreement type you select under #5 on the first page, additional SmartForms will be generated with questions specific to the agreement type.

**Agreement Upload**

1. Agreement manager/Principal investigator:
2. \* Agreement creator:
3. \* Upload agreement draft: (or check the box below)  [None]
4. Title:
5. \* Agreement type:
6. Description:
7. Supporting documents (purchase requisition, budget, scope of work, etc.):   
  
Name  
There are no items to display
8. Funding Proposal Number:
9. Oracle Award Number, if applicable:   
  
Oracle Award Number  
There are no items to display
10. \* Is this application in response to an opportunity specifically related to COVID-19?  Yes  No

You can navigate to other pages within the SmartForms on the left hand side by selecting the applicable page.



3. On the last page, click **Finish**.
4. On the left, click **Submit**.

**Next Steps**

**Edit Agreement**

**Printer Version**

**View All Correspondence**

 [Submit](#)

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

**Submit**

By clicking OK below you are attesting that:

- All information provided is accurate and filled out to the best of your ability.
- Everything related to this agreement has been included.

OK

Cancel

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

**Pre-Submission**

**Unassigned**

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## **Assign an Ancillary Reviewer**

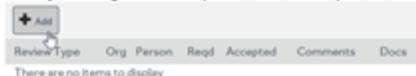
You can add an organization or a person as an ancillary reviewer up until you submit the agreement.

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**.

- Submit
- Manage Ancillary Reviews
- Discard
- Copy Agreement
- Manage Relationships

#### 4. Click **Add**.

1. Identify each organization or person who should provide additional review



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:

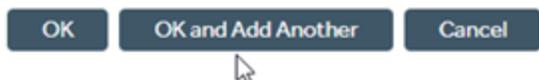
- Compliance
- Department
- Export Controls
- Faculty
- IBC
- Office of Technology Licensing
- Other
- Radiation
- RF Legal Office
- Safety
- Scientific

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.

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## Respond to Reviewer Requests

1. From Dashboard enter My Inbox, click the agreement name to open it

2. In the agreement, look for the **Submit Ancillary Review** activity on the left hand side and review any comments.

-  [Assign Office](#)
-  [Assign Owner](#)
-  [Unassign Owner](#)
-  [Manage Ancillary Reviews](#)
-  [Submit Ancillary Review](#)
-  [Manage Access](#)
-  [Email Agreement](#)

3. When approving make sure to check the box indicating the Ancillary Review request you're submitting for.

1. \* **Select the review you are submitting:**

Organization	Person	Review Type	Required	Accepted	Completed	Comments	Date Review Created
<input type="checkbox"/>	Steven Spaccarelli	Other/Approver may vary	yes		no	Test	6/13/2023

2. \* **Do you accept this agreement?** 

Yes  No [Clear](#)

3. \* **Is the ancillary review complete?** 

Yes  No [Clear](#)

4. Complete the remaining Smart Form questions and then press **OK** if you accept the Agreement and the Ancillary Review is completed.

5. (Optional) In the **Comments** box, type a response to the reviewer's comments or questions.

## 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.

 Create Amendment Contact Owner Copy Agreement Manage Relationships

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

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## Additional Actions

You can withdraw or discard agreements before they become Active.

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.**

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## 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

**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