

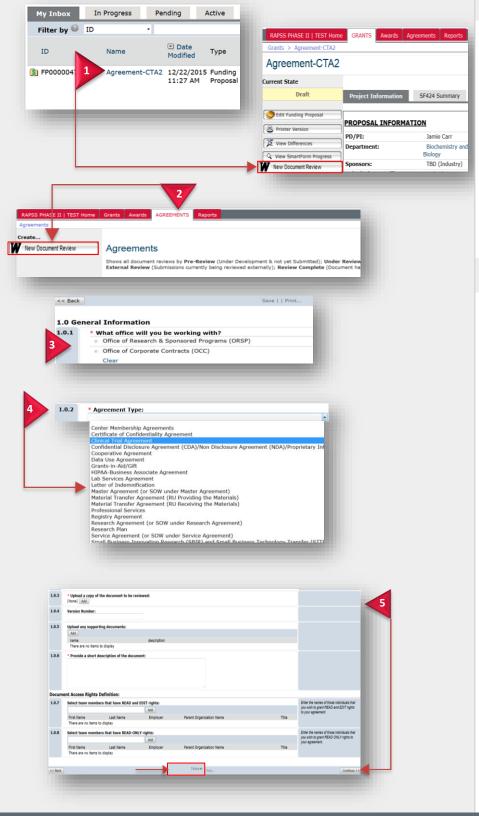
# Research Administration & Proposal Submission System (RAPSS) Agreements Quick Reference Guide Overview

This document is intended for Departments and Central Offices.

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### **Agreements Overview**

An **Agreement** can be initiated by either the Unit or by the Central office (depending on the type of Agreement being prepared). In either case, the individual initiating the agreement would be considered the "Author".



#### **Initiate an Agreement**

There are two ways a new agreement can be initiated:

From the Funding Proposal Workspace (if an agreement requires funding):

1. Under Current State, click New Document Review.

From the Agreements Tab (if an agreement does not require funding:

2. Under Create, click New Document Review.

#### **General Agreement Information**

- **3.** 1.0.1- Select which office you will be working with, (**ORSP** or **OCC**), to ensure that the Agreement is processed by the appropriate Central Office.
- 1.0.2- From the Agreement Type drop-down, select the desired Agreement.

**Note:** The Agreement type selected will determine the applicable smart forms to be completed.

- 5. 1.0.7- Be sure to include anyone who is a part of the submitting team and will require **Read** and **Edit** access to the agreement.
- 6. Once all fields are complete, click **Save** or **Continue** to proceed.

### **Associate Funding Proposal**

The type of Agreement being prepared will determine whether or not a proposal should accompany it. Anything that involves funding (ie: Clinical Trial Agreement) will require an associated proposal and should be initiated via the **Funding Proposal Workspace** before the Agreement is set up. If a funding proposal is not required, you can proceed through the forms via the **Agreements tab**. NOTE: If you initiate an agreement from the Agreements tab first but choose a type that requires funding, you will be unable to continue until the association with the funding proposal has been made.

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#### **Funding Proposal Exists**

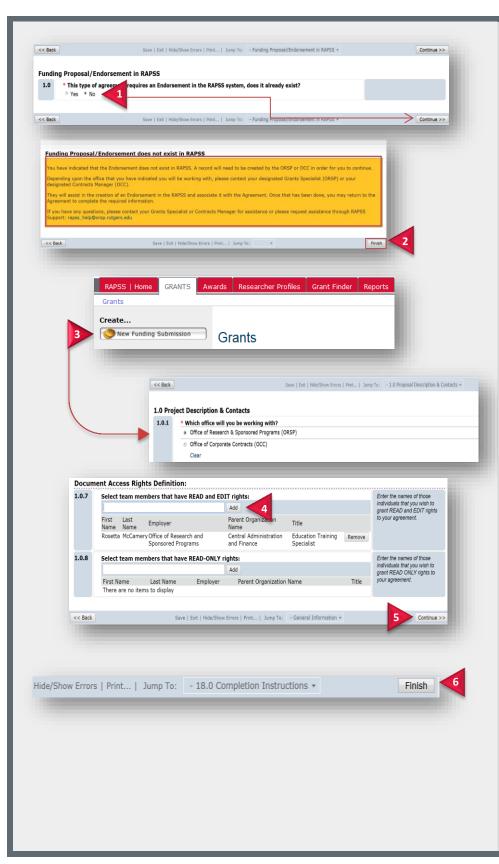
Once the author has chosen the desired agreement type, the next section will inquire about the proposal:

- 1. Click Yes, if the funding proposal exists, then click **Continue**.
- 2. Associate the Parent Funding Proposal.
  - a. If the Central Office has initiated the agreement, from the Agreements Workspace go to Set Parent Funding Proposal and type in or search for the appropriate proposal number.

Once the proposal is selected, click OK and return to **Edit Document Review**.

b. If the **Unit** has initiated the agreement, type the proposal number in section 1.0, then click **Select or Enter** when the appropriate funding proposal is found. Click **Continue** to proceed to the next section.

Once all sections are complete: visit Complete and Submit Agreement



## Funding Proposal Does Not Exist

If a funding proposal does not yet exist:

1. Select No in section 1.0 and then Continue.

You will not be able to move any further with this Agreement.

2. Click **Finish** and create the appropriate funding proposal.

Note: Either the Central Office or the Unit can create the Funding Proposal.

- **3.** From the Grants tab, click **New Funding Submission** and complete the pages.
- If the Central Office initiates the proposal, be sure to Add any proposal team members who need Read/Edit rights.
- 5. Complete the pages. Click **Continue** to move through the pages.
- 6. Once all pages are complete, follow the completion instructions on the last page of the proposal and click **Finish**.

Return to the Agreement and follow the instructions for Funding Proposal Exists.

### **Complete and Submit an Agreement**

Once all of the agreement smart forms have been completed, submit the agreement for Owner Review.



# Complete and Submit Agreement

- 1. Click Hide/Show Errors to validate the agreement and make any necessary corrections.
- 2. On the final page, click Finish.
- 3. Under My Current Action click Submit for Review.
- 4. Review the Assurance and click **OK**.
- The State of the agreement will move from Pre-Submission to Owner Review.

**Owners**: To re-route the Agreement back to the Author/Agreement team for further revisions, please review: <u>Owner Review- Agreements Quick</u> <u>Reference</u> (Page 5).

 Author/Agreement Team: If an Agreement has been re-routed to you for further revisions, and all changes have been made, advance the agreement back to the Owner by executing the "Submit Changes" activity, as shown.

The State of the agreement will move back to **Owner Review**.