**Agreement Acceptance**

The Agreement Acceptance (AA) is a new process to accommodate PI and unit approvals for agreements (Awards, UFAs, etc.) that require additional approvals. It replaces the PAF-R and other award approval paper processes. ORSP or OTT will initiate the new process, and PI and Unit Approvals will be processed in eRPM.

The chart below lists the potential terms or scenarios that will require review and approval. These terms will display for selection in the **Create Agreement Acceptance Request** activity. An ‘x’ indicates approval is required.

<table>
<thead>
<tr>
<th>SCENARIO</th>
<th>REVIEWER</th>
<th>Other Central Office (for approval)</th>
<th>PI/Project Team (for editing or agreement)</th>
<th>Project Admin Home Div/Dept (for approval)</th>
<th>Project Admin Home Dean (for approval)</th>
<th>ORSP (for handling)</th>
<th>UMOR (for approval)</th>
</tr>
</thead>
<tbody>
<tr>
<td>20% Change in Funding (+/-)</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Cost Sharing Change</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>External Audit</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F&amp;A Rate Change</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foreign Currency</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Governing Law</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Insurance (Risk Management)</td>
<td>X</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>IT Security</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Publication Restriction - Prior Sponsor Approval</td>
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<tr>
<td>Publication Restriction &gt; 180 Days</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>X*</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Create Agreement Acceptance Request Activity**

ORSP or OTT will create the Acceptance Agreement. It is then routed to the reviewers that need to approve, and they will receive an email notification informing them that action is required.

**Notes:**

- For multiple PI situations, only the Contact PI is involved in the Agreement Acceptance process.
- All departments on the originating PAF/UFA will be notified; however, only the Administrative Home chain will be required to approve.
1. From the applicable PAF or UFA workspace, click **Create Agreement Acceptance Request**.

2. Check the boxes to **select the term type**.

3. Enter a **Description of the terms requiring additional review and approval**.

4. (Optional) Click **Add** to upload applicable documents.

5. **Enter Central Office Reviewers**.

   **Note**: This may be required based on the term type selected.

6. Click **OK**.

   The Agreement Acceptance Workspace will open. The request is routed to the applicable PI, Department and School/College/Institute and other required signers (see chart above).

   **Note**: The PAF or UFA workspace will display an Agreement Acceptance message, a link to the AAR under Agreement Acceptance Requests, and the activity under Recent Activity.
Project Representative Approve/Decline/Request Changes

After the Agreement Acceptance Request is approved by all of the required signers, it will be returned to ORSP. It will display on the Project Representative’s Awards Inbox tab or on the OTT’s Inbox tab. The Project Representative or OTT can then Approve, Decline, or Request Changes.

PR Approve

Agreement Acceptance Workspace

1. From the applicable Agreement Acceptance workspace, click PR Approve.

PR Approve Window

2. (Optional) Enter Comments.

3. (Optional) Click Add to upload approval documents.

4. Click OK.

The record will be routed to UMOR for further review, if needed.
PR Decline

Agreement Acceptance Workspace

1. From the applicable Agreement Acceptance workspace, click **PR Decline**.

PR Decline Window

2. (Optional) Enter **Comments**.
3. (Optional) Click **Add** to upload additional documents.
4. Click **OK**.

The Agreement Acceptance will be in the state of **Declined**.
PR Request Changes

Agreement Acceptance Workspace

1. From the applicable Agreement Acceptance workspace, click PR Request Changes.

PR Request Changes Window

2. Enter Comments describing the changes needed.

3. (Optional) Click Add to upload documents about the change.

4. Click OK.

The Agreement Acceptance will be returned to the Project Team for changes, but it will not route to departments for further approval.