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>Unit Review - Project Admin Home Div/Dept (for approval)</th>
<th>Unit Review - 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>X</td>
<td>X</td>
</tr>
<tr>
<td>Cost Sharing Change</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>External Audit</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>F&amp;A Rate Change</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Foreign Currency</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Governing Law</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Insurance (Risk Management)</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>IT Security</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
</tr>
<tr>
<td>Publication Restriction - Prior Sponsor Approval</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Publication Restriction &gt; 180 Days</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>X*</td>
<td>X*</td>
<td>X*</td>
<td>X*</td>
<td>X*</td>
<td>X*</td>
</tr>
</tbody>
</table>

Create Agreement Acceptance Request Activity

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

Notes:

- Standard AARs will follow a consistent workflow:
  - ORSP → Project Team → PI → Unit Review → ORSP → UMOR (as needed)
    - If another central office is required, such as Treasury, the AAR will be routed from ORSP to that central office prior to any other applicable approvals.
    - If there are multiple PIs, the AAR requires approval from only the Contact PI.
    - If there is a Sponsor PI, the AAR requires approval from only the U-M PI.
- All departments on the originating PAF/UFA will be notified that an AAR is in progress; however, only the Administrative Home chain will be required to approve.
1. From the applicable PAF, UFA, or Award workspace, click Create Agreement Acceptance Request under Activities.

Create Agreement Acceptance Request Window

2. Check the boxes to select the term type.
3. If Other is selected, check the boxes to route to other approvers.

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

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

6. (Optional) Enter **Request Deadline**.

7. Enter **Central Office Reviewers**, if applicable.

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

8. Click **OK**.

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

**Note**: The PAF, UFA, or Award workspace will display an Agreement Acceptance message, a link to the AAR under Agreement Acceptance Requests, and the activity under Recent Activity or Activity History.
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.

Notes:
• Click View Agreement Acceptance Request or the Attachments tab to review Project Team documents.
• Click Attachments or review Recent Activity for unit Approval documents.
• See a list of required departments under Unit Approval Status.

PR Approve Window

2. (Optional) Enter Comments.
3. (Optional) Click Add to upload 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.