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. 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>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>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</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>X</td>
<td>X</td>
</tr>
<tr>
<td>Foreign Currency</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Governing Law</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Insurance (Risk Management)</td>
<td></td>
<td>X</td>
<td></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>
<td></td>
<td>X</td>
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<tr>
<td>Publication Restriction - Prior Sponsor Approval</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>Publication Restriction &gt; 180 Days</td>
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<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Other</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

After ORSP or OTT creates the Agreement Acceptance Request, 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 an other 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.
- Publication Restrictions require approval by the Department Chair and Dean. Approval can be completed by a unit approver, but additional documentation indicating approval must be uploaded.
Review and Sign Agreement Acceptance Request

Action required Email Notification

The email displays basic Agreement Acceptance information, such as the ID, PAF/UFA, and information from the Central Office.

1. Click the email link to access the Agreement Acceptance Request (not shown here).

OR

PAF (or UFA) Workspace

If you are already logged into eRPM:

1. From the applicable PAF or UFA workspace, click the Related Agreement Acceptance ID.

Notes:

- The Agreement Acceptance will also display on the PAFs with Required Action list on the Home Workspace.
- The Agreement Acceptance Request will be in the state of Project Team Review and Route.

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Agreement Acceptance Request Workspace

2. Click **Edit Agreement Acceptance Request** to attach supporting documentation (i.e. Revised Budget, Revised SOW, etc.).

To route for approval:

3. Click **Route for Approval** and go to step 5.

To decline:

4. Click **Project Team Decline Terms** and go to step 7.

Notes:

- The Project Team or PI must execute the **Route for Approval** activity before it can be accepted by the PI and routed for additional approvals.
- The review stops that are required can be viewed on the **Status map** and under **Unit Approval Status**.

Route for Approval Window

Note: Ensure appropriate documentation has been added.

5. Enter **Comments**.

6. Click **OK**.

The activity is recorded under **Recent Activity** in the Agreement Acceptance Workspace and is routed as applicable to the Admin Home Department, Dean (School/College/Institute) and other required signers (see chart above).

Project Team Decline Terms Window

7. Enter **Comments** indicating what should be declined.

8. Click **OK**.

Notes:

- The state will change to **ORSP Pending Decline**, and the AAR will be routed to ORSP for review.
- The activity is recorded under **Recent Activity** in the Agreement Acceptance Workspace.
Agreement Acceptance Request Workspace

PI:

The Agreement Acceptance Request will be in the state of **PI Review**.

9. Click **Edit Agreement Acceptance Request** to attach supporting documentation (i.e. Revised Budget, Revised SOW, etc.).

To approve:

10. Click **PI Accept Terms** and go to step 12.

To decline:

11. Click **Project Team Decline Terms** and go to step 7.

PI Accept Terms Window

12. Review the terms requiring review and approval.

13. Enter **Comments**.

14. Click **OK**.

The Agreement will be routed for Unit Review.