# Unit Review Agreement Acceptance Request

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></td>
<td></td>
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<tr>
<td>Cost Sharing Change</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>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></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Governing Law</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance (Risk Management)</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Security</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>Publication Restriction - Prior Sponsor Approval</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Publication Restriction &gt; 180 Days</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></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>

*optional

After ORSP or OTT creates the Agreement Acceptance Request (AAR), it is then routed to the reviewers that need to approve. 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)
- All departments on the originating PAF/UFA will be notified; 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.

See the instructions below to review, approve, decline, or request changes.

### Action Required Email Notification

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

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

OR
If you are already logged into eRPM:
1. Verify that the Reviewer role is selected.
2. Click the Agreement Acceptance tab.
3. Click the Name of the agreement.

Notes:
- The Agreement Acceptance will also display on the PAFs (or UFAs) Ready for Review and Approval or PAFs with Changes Returned lists or on the Home Workspace.
- The Agreement Acceptance will be in the state of Unit Review.

Review Agreement Acceptance Request

Agreement Acceptance Request Workspace

4. Click View Agreement Acceptance Request to review any documentation attached by the Project Team.

Note: Documents can also be viewed on the Attachments tab.

View Agreement Acceptance Request

Review the terms of the agreement acceptance request.

5. Click Finish.
Approve Agreement Acceptance Request

Agreement Acceptance Request Workspace

6. Click **Unit Approve** from the Activities menu.

**Note**: The review approval stops that are required can be viewed under **Unit Approval Status**.

Unit Approve Window

7. Review the **Terms Requiring Review and Approval**.
8. Check the **Department(s)** that you are granting approval.
9. (For publication restrictions only) click **Add** to upload confirmation of approval.

**Note**: 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.

10. Enter **Comments**.

**Note**: Comments will appear on the main workspace.

11. Click **OK**.

The approval is recorded under **Recent Activity** in the Agreement Acceptance Workspace and is routed as applicable to other required signers (see chart above).
12. Click **Reviewer Decline Terms** from the Activities menu.

13. Enter **Comments**.

**Note:** Comments will appear on the main workspace.

14. Click **OK**.

The state of the Agreement Acceptance will become **ORSP Pending Decline**, and the AAR will be routed to ORSP for review.
Request Changes

If a reviewer needs to request changes to the Agreement Acceptance, follow the steps below.

Agreement Acceptance Request Workspace

15. Click **Reviewer Request Changes** from the Activities menu.

Reviewer Request Changes Window

16. Enter **Comments** describing the changes.

17. (Optional) Click **Add** to upload the requested changes.

18. Click **OK**.

Notes:

- The PI/Project team will be notified of the requested changes.
- The state of the Agreement Acceptance will become **Project Team Making Changes**.