The State of an UFA represents where it is in the review process and determines where it appears within eRPM (e.g., inbox).

Information related to UFAs can be viewed and edited in the Manage Data menu.

Activities performed by a user move an UFA from one state to another.

**Sponsor Roles**
- **Direct Sponsor:** The organization from which funds are directly received.
- **Prime Sponsor:** The original source of funds.

**Activities**
- **ORSP Cancel:** Record was completed in error.
- **Withdraw:** U-M decides not to go forward with the agreement.
- **Turn Down:** The sponsor decides not to go forward with the agreement.

**Typical UFA Review Workflow by State**

All previous actions taken on an UFA are displayed on the Recent Activity list at the bottom of the UFA Workspace.

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<th>PR Review</th>
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**Administrative Review**

**Role:** Admin Specialist  
**Tab:** UFAs

1. Open the applicable UFA from the UFAs list by clicking its name.

From the Manage Data menu:

2. Click Manage Sponsors. Review sponsor information and edit if necessary. Click OK.
3. Verify that the correct Agreement Category/Type is indicated.
4. Click Complete Admin Check. Confirm that you’ve reviewed the sponsor information. Select appropriate project rep. Enter any optional comments in the field provided. Click OK.

**Note:** Any comments entered appear in the Recent Activity list.

The state of the UFA changes to PR Review.

**Project Representative Review**

**Role:** ORSP-PR  
**Tab:** Proposals Inbox

1. Open the applicable UFA from the UFAs list by clicking its name.

2. Review the Sponsor Info, Draft Documents and Recent Activity (including any notes/comments) listed on the UFA Workspace.
3. Click Display UFA Summary.
4. Review and verify:
   - Sponsor Contact Information
   - Routing and Processing Instructions
   - Project Information
   - PI Signatures
5. Click OK.
6. Click Negotiation in Progress from the Activities menu.
7. Attach any documents by clicking and post any comments in the field provided.

**Note:** Any comments entered will appear in the Recent Activity list.

8. Click OK.

The state of the UFA changes to Negotiation in Progress.
Partially Executed Contract Sent to Sponsor

1. Click **Partially Executed Contract Sent to Sponsor** from the Activities menu.
2. Enter any comments in the field provided (optional).
3. Attach the contract by clicking **Attach**.

The state of the UFA changes to **Awaiting Sponsor Signature**.

Note: Once the sponsor signature has been obtained, complete the Log Fully Executed Contract to activate the project.

Note: All Recorded Actions will appear in the Recent Activities list.

Send to PI for Signature

1. Click **Send to PI for Signature** from the Activities menu.
2. Enter any comments for the PI in the field provided (optional).
3. Click **Attach** to attach any documents (optional).
4. Click **OK**.

The state of the UFA changes to **PI Sign Contract**.

Note: If additional unit approvals are required after negotiation is complete, use Request Unit Approval of Contract Terms to obtain required unit approvals prior to processing the agreement.

Record Processing Steps

1. Click **Record Processing Steps** from the Activities menu.
2. Enter the **Agreement Start Date**, **End Date** and **Confidentiality Period** (optional).
3. Click the appropriate radio buttons for **Signature Requirements** (required).
4. Provide staff with instructions on what still needs to be completed in the field provided (optional).
5. Click **Attach** to attach any documents (optional), then click **OK**.

The state of the UFA changes to **UFA Processing**.

Create / Route FOIA Letter

1. (Staff or PR) Click the Create FOIA Letter activity and select the time period. Then click **OK**.
2. If created by Staff, click **Route to PR Review**. Otherwise, skip to step 3.
3. (Staff or PR) If desired, click **Edit FOIA Letter** and make any necessary changes.
4. (PR only) If desired, click **PR Request Changes** to request that ORSP Staff make changes.
5. (PR only) Click **Route to FOIA Office**, verify or edit the **Letter Date**, enter optional Comments, and then click **OK**.

The state of the UFA changes to **Active**.

Send to Signing Officer for Review

1. Click **Send for SO Review** from the Activities menu.
2. Enter any comments for the Signing Officer in the field provided (optional).
3. Click **Attach** to attach any documents (optional).
4. Click **OK**.

The state of the UFA changes to **Signing Officer Review**.

Note: Once the SO grants approval, the state of the UFA will change back to **UFA Processing**.

Log Fully Executed Contract

1. Click **Log Fully Executed Contract** from the Activities menu.
2. Enter the date the contract was fully executed (the date the final signature was obtained) in the field provided (required).
3. Attach the final contract by clicking **Attach**.
4. Click **OK**.

The state of the UFA changes to **Active**.

Note: The document will be located in the Final Documents list.