UMOR 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>
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<tr>
<td>Cost Sharing Change</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>External Audit</td>
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<td></td>
<td>X</td>
<td></td>
<td>X</td>
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<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>
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<td></td>
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<tr>
<td>Governing Law</td>
<td></td>
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<td></td>
<td></td>
<td>X</td>
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<tr>
<td>Insurance (Risk Management)</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
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<tr>
<td>IT Security</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<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>
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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></td>
<td></td>
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<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 Acceptance Agreement Request (AAR), 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)
- 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.

Follow the instructions below to Review, Approve/Decline or Return for Additional Processing.

Review Agreement Acceptance Request

Action required Email Notification

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

1. Click the email link to access the Agreement Acceptance Request (not shown here). Go to step 3.

OR
If you are already logged into eRPM:

1. Verify that the applicable UMOR role is selected.
2. Click the name of the agreement.

Notes:
- The Inbox tab lists AARs Ready for Review. The state will be UMOR Review.
- The In Progress tab lists requests Returned for Changes and Upcoming.
- The Active tab lists Approved requests.

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

Note: These documents can also be viewed on the Attachments tab as well as documents attached during the Unit(s) review and approval.

Review the terms of the agreement acceptance request.
4. Click Finish.
5. Click **UMOR Accept or Decline Terms** from the Activities menu.

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

6. Select the **Review Outcome**.
   - **Approve** notifies ORSP to approve.
   - **Decline** notifies ORSP to withdraw, and the state will change to **ORSP Pending Decline**.

7. Enter **Comments**.

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

8. (Optional) Click **Add** to upload approval documentation.

9. Click **OK**.

The review outcome is recorded under **Recent Activity** in the Agreement Acceptance Workspace.
Return for Additional Processing (Request Changes)

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

Agreement Acceptance Request Workspace

1. Click Return for Additional Processing from the Activities menu.

Return for Additional Processing Window

2. Enter Comments describing changes and/or why the Agreement Acceptance is being returned.

3. Click OK.

Note: The state of the Agreement Acceptance will become Project Representative Review. ORSP can then route to the Project Team, if necessary.