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Unfunded Agreements Quick Reference Card for PI/Project Team

Need Help?

ITS Service Center: Technical support <http://its.umich.edu/help/>
Phone: (734) 764-4357 **Email:** 4help@umich.edu

ORSP Project Representatives
<http://orsp.umich.edu/orsp-staff>

Phone: (734) 764-5500 **Fax:** (734) 763-4053, 764-8510

Office of Technology Transfer: Material Transfer Agreements
<https://techtransfer.umich.edu/for-inventors/mta/>
Email: MichiganMTA@umich.edu

What is an Unfunded Agreement?

An “unfunded agreement” (**UFA**) is a non-financial agreement with a sponsor. Examples of UFA Categories include:

- Data Use Agreements
- Non-Disclosure Agreement
- “Other” (e.g., Memorandum of Understanding, Teaming agreements, etc.)
- Material Transfer Agreement
- Master Agreement (ORSP will continue to create)

Central Office Review & Approval

All UFAs require approval from a Central Office. Depending on the UFA Category, it may also require Unit approval. The routing to a Central Office (and Unit, if required) is pre-set in the system by the Agreement Category.

ORSP: Data Use Agreement, Non-Disclosure Agreement, “Other”

Office of Technology Transfer: Material Transfer Agreement (incoming & outgoing)

Entering an Unfunded Agreement in eRPM

Regardless of the UFA Category, the initial steps to enter an UFA in eRPM are the same. On the first page of the form (Introduction), you are prompted to enter a **Project Title** and select an **Agreement Category** (UFA type). Applicable sections of the form then open based on the selected Agreement Category. If you want to clone (copy data from) an existing UFA, see the [Clone an UFA](#) step-by-step procedure.

1) Create New UFA

1. Verify the **PI & Project Team** role is selected.
2. From your Home Workspace, click the **Create New UFA** button.
3. On the **Introduction** page, enter a **Project Title** and select an **Agreement Category**.
4. Complete any additional required questions that display based on the selected category/type.
5. Click **Continue**.
6. Click **OK** to add the person to the UFA.
7. Repeat steps 2-7 until all desired personnel are added to the UFA.
8. Click the applicable radio buttons to identify the **Contact PI** and the **Primary Research Administrator**.
9. Click **Add Appointment** next to the Contact PI’s name.
10. Click **Add to UFA** for the correct appointment, and then click **OK**.
11. Click **Continue**.

2) Enter Personnel

1. Read the instructions at the top of the **Personnel** page for details and requirements.
2. Click **Add**.
3. Begin typing the person’s name and then select them from the predictive list that displays. [You can search by Last Name or username.](#)
4. Select the person’s **Role** on the UFA from the drop-down list.
5. Select the **Edit UFA** checkbox to change the person’s edit rights on the UFA, as appropriate.

Role Information:

- You must have at least one **PI or Responsible Faculty Member** and one **Administrative Contact**.
- The **Primary Research Administrator** is automatically granted edit rights on the UFA.
- In order to delete a **Contact PI** or a **Primary Research Administrator**, you must first add a new person with that role and click **Save**. Only then will a **Delete (x)** button display allowing you to remove the original person.

3) Complete Additional Sections

Additional sections of the UFA worksheet display based on the **Agreement Category** selected on the **Introduction** page.

- Complete all remaining sections of the UFA worksheet.
- Required fields are marked with a red asterisk *.
- After completing a section, click **Continue** to save and navigate to the next section of the form.
- Remember to click **Save** before you **Exit** if you wish to save your progress and complete the form at a later time.
- UFAs that have been started but are not yet complete will display on the **UFAs** tab in your Home Workspace.

4) End of UFA Worksheet

- It is recommended that you click **Hide/Show Errors** to verify that all required information has been provided before continuing.
- You can continue to **Edit UFA Worksheet** as often as needed until it has been routed for review.
- Before the UFA can be routed for review, the **Project Team Route UFA** activity must be completed.

5) Contact PI Sign UFA

The **Contact PI** must sign the UFA prior to final agreement execution.

1. From your Home Workspace, click the **UFAs** tab.
2. Click the **Name** of the UFA from the **UFAs Not Yet Signed by PI** list.
3. If desired, click **Display UFA Summary** to review the information entered in the form, then click **OK**.
4. Click the **Sign UFA** activity.
5. Click the applicable radio button for the **Conflict of Interest Statement**.
6. If desired, enter **Comments** and/or click **Add** to attach any documents.
7. If it displays, click the applicable radio button for the **Accelerated Clinical Trial Agreement**.
8. Check the checkbox to **Sign the UFA**.
9. Click **OK**.

6) Route UFA for Review (PI or Project Team)

1. From your Home Workspace, click the **UFAs** tab.
2. Click the **Name** of the UFA from the **UFAs With Required Action** list.
3. Click the **Project Team Route UFA** activity. *The system automatically validates that all required fields are complete. Any errors must be addressed before routing.*
4. If desired, enter **Comments**.
5. Click **OK**.

Responding to Reviewer-Requested Changes

Project Teams will receive an email notification if the Central Office (or Unit) requests changes to the UFA. UFA records with requested changes can be found in the **UFAs With Required Action** list on the **UFAs** tab of your Home Workspace. After clicking the **Name** of the UFA, complete the following steps.

1. Click **Edit UFA Worksheet** and make the requested changes to the form. *If you do not wish to make the requested changes, click the **Project Team Decline Changes** activity, enter a reason in the **Comments** field, and click **OK**.*
2. Click the **Project Team Submit Changes** activity, select the applicable **Change Type** and enter a **Reason for Change**, and then click **OK**.