ResearchUVA Powered by Huron Training
Agreements Module
https://mpclkuvastage.huronclick.com/AgreementsTest

Exercise 1: Create an Incoming Agreement

ⓘ *For this exercise you will select one agreement type – either a non-funded agreement or a clinical trial agreement based on the incoming agreement types you typically manage*

☐ Log in as yourself using your UVA username and password

☐ Click **Agreements** >> **Agreements** to navigate to the Agreements Module page

☐ Click **Create Agreement** to start a new agreement

☐ Complete the Agreement SmartForms as indicated below

Agreement Upload Page

☐ Answer the questions as follows:

1. Agreement manager/Principal investigator: Rebecca Simms
2. Administrative contact: <u>this defaults to you</u>. Change to your cognizant Submitting Office Official
3. Upload agreement draft: attach the sample PDF agreement that was provided in the calendar invitation for today's session
4. Project Title or Identifier: <u>for training purposes</u>, enter today's date and your initials (i.e., 20220405 MAS)
5. Agreement Type: select the appropriate type based on what you want to enter today (non-funded or clinical trial agreement)
6. Description: enter a short description that corresponds to the selected agreement type
7. Supporting documents: leave blank
8. Does this request require UVA to provide funding (>$500) to an outside party for goods and services?: No

☐ Click **Continue** to move to the next page

General Information Page

☐ Answer the questions as follows:

1. Select a counterparty or the subrecipient: select a counterparty from the list
2-4. Counterparty contact information: enter counterparty contact information
5. Responsible department/division/institute: this defaults to the PI's department, leave as is
6. Agreement collaborators: enter your name here (this is how you will retain access to the agreement since you are not the PI nor the Administrative Contact on the agreement)
7. Additional counterparties: leave blank
8. Counterparty address: enter counterparty address

☐ Click **Continue** to move to the next page

All Other Agreements Pages

ⓘ *The pages that appear in the Agreement SmartForm are dependent on the Agreement Type selected on the Agreement Upload Page*

☐ Complete the rest of the Agreement SmartForm. Do not complete questions that indicate "to be completed only by OSP." On the last page of the SmartForm, click **Finish** to return to the Agreement Workspace

Exercise 2: Create (Request) an Outgoing Subaward

☐ From the Agreements Module page, click **Create Agreement** to create a new agreement

☐ Complete the Agreement SmartForms as indicated below

Agreement Upload Page

☐ Answer the questions as follows:

1. Agreement manager/Principal investigator: Rebecca Simms
2. Administrative contact: this defaults to you. Change to your cognizant Submitting Office Official
3. Upload agreement draft (or check the box below): check the box below (no attachment)
4. Project Title or Identifier: for training purposes, enter today's date and your initials (i.e., 20220405 MAS)
5. Agreement Type: Outgoing Subaward
6. Description: enter a short description for the outgoing subaward
7. Supporting documents: leave blank
8. Does this request require UVA to provide funding (>$500) to an outside party for goods and services?: No

☐ Click **Continue** to move to the next page

General Information Page

☐ Answer the questions as follows:

1. Select a counterparty or the subrecipient: select a subrecipient from the list

2-4: Counterparty contact information: enter counterparty (subrecipient) contact information

5. Responsible department/division/institute: This defaults to the PI's department, leave as is

6. Agreement collaborators: enter your name here (this is how you will retain access to the agreement since you are not the PI nor the Administrative Contact on the agreement)

7. Additional counterparties: leave blank

8. Counterparty address: enter counterparty (subrecipient) address

☐ Click **Continue** to move to the next page

All Other Agreements Pages

ⓘ *The pages that appear in the Agreement SmartForm are dependent on the Agreement Type selected on the Agreement Upload page. For this agreement you will see the subaward pages*

☐ Complete the rest of the Agreement SmartForm. Do not complete questions that indicate "completed by OSP" or the Subaward Amendment Information page. On the last page of the SmartForm, click **Finish** to return to the Agreement Workspace

Training Conclusion

Thank you for attending today's training session