Job Aid: Request Clarification
For Negotiators:

If an Agreement Smartform is incomplete or inaccurate, or if you need additional information to proceed with a negotiation:

1. Click “Request Clarification” on the left side of the Agreements Workspace:

   ![Request Clarification]

2. In the popup window, at step 1, specify the change(s) or information needed to proceed with the negotiation, and include the following verbiage in your instructions:

   “After entering the requested information, please click “Submit Changes” on the left side of the Workspace.”

3. In the popup window, at step 2, upload any relevant attachments.

4. Before clicking OK, copy the text from the box at step 1 of the popup.

5. Click the OK button in the popup window.

6. Email the cognizant Department Administrator, PI, etc. Paste the text you copied at Step 4 and include a link to the record.

The status of the record will change to: **Clarification Requested**

While in this state, the Contract Negotiator will remain the Owner of the Record and maintain the ability to modify the Agreement Smartform. However, the Actions available on the left side of the Agreement Workspace will be limited.
This means that Contract Negotiators can continue to work on the record while awaiting Clarification but cannot toggle between Internal and External Review. Any external negotiations should be captured via Log Correspondence.

2 For Administrators, PIs, etc.:

When OSP Requests Clarification, you will receive an automated email from the System, indicating that your input is required, as well as an email from the Contract Negotiator, explaining the request and linking to the record.

1. Follow the link to the record from your email or navigate to the record from your Dashboard.
2. Click the “History” tab in the middle of the workspace. The comment under “Clarification Requested” will explain the information that is needed.
3. If the request requires updates to the Agreement Smartform, click “Edit Agreement” on the left side of the Agreements Workspace:

   ![Edit Agreement](image)

4. Upload supporting documents, if requested, in the “supporting documents” field under question 7 of the Agreement Upload page of the Smartform.
5. Click “Submit Changes” on the left side of the workspace once all changes have been made:

   ![Submit Changes](image)

6. In the popup, include any relevant notes and click the OK button.

The status of the record will change to: ![Internal Review](image)

The Contract Negotiator will be able to continue external negotiations.