Quick Guide: Creating and Submitting an Unfunded Agreement

Follow these steps to create an agreement directly in the Agreements module:

Step 1: Start the Agreement Creation

1. Navigate to the **Dashboard** or **Agreements** Module page.
2. Select the "Create Agreement" button.

Step 2: Complete the Agreements SmartForm

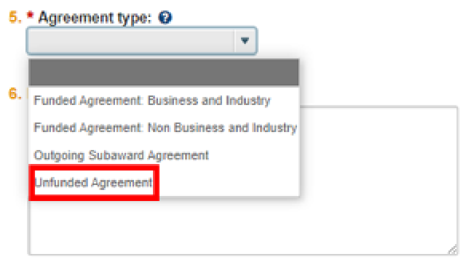
You will go through a series of pages:

- **Agreement Upload Page : Choose Unfunded Agreement in #5**
- **General Information**
- **Completion Instructions**
- Additional pages based on the agreement type selected (e.g., Agreement Information, Compliance Review, Additional Information for UFRA).

Step 3: Fill Out the Agreement Upload Page

1. **Principal Investigator**: Enter or search for the PI's name.
2. **Primary Contact**: Automatically populated but can be changed. Ensure the creator is added as an editor to retain access.

3. **Upload Agreement Draft**: Upload a draft or select the option for SPA to create one.
4. **Title or Reference Number**: Enter a short title or reference number.
5. **Agreement Type**: Select the appropriate agreement type (hover over for definitions). Choose Unfunded Agreement for UFRA



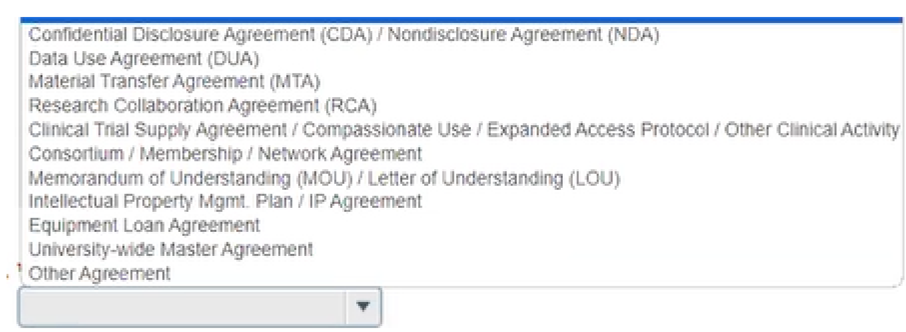
6. **Description**: Provide a brief description (first 48 characters will appear in the Workflow map).
7. **Supporting Documents**: Attach necessary documents for review.

Step 4: Complete the General Information Page

1. **Contracting Party**: Select or enter the **external party's** name.
2. **Contact Information (Questions 2-4)**: Provide contact details for the counterparty.
3. **Additional Contracting Parties**: Add any extra signing parties.
4. **Administering Department**: Confirm or select the correct UMN department.
5. **Edit Permissions**: Add any UMN personnel who need editing access.

Step 5: Complete the Agreement Information Page

1. **Technical Summary**: Provide a lay-friendly description of the project.
2. **Expected Duration**: Indicate the agreement's term.
3. **Select UFRA Type**: select from the drop down which type of UFRA is being requested. The Type selected will open up additional required fields.



Completion Instructions Page

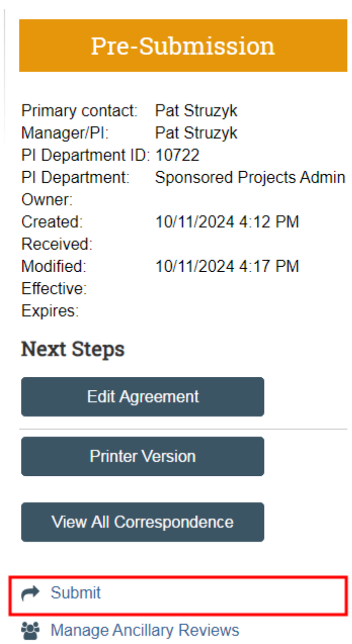
1. **Finish**: After completing all pages, select the "Finish" button to return to the UFRA Agreement Workspace. The Agreement Record will be in the Pre-Submission state. Move on to the next step.

Important: Clicking the “Finish” button does not submit the agreement to SPA. Follow the steps below to submit the UFRA Agreement to SPA for review:

Submitting the Agreement to SPA

Once PI approval is secured:

1. From the Agreement Workspace, select the **Submit activity**.



2. The agreement state will update to **Unassigned** or **In Review**.
3. An Agreement Owner will be assigned and notified for further review by SPA.