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Create and Submit an Agreement

When you create an agreement, you are required to complete a series of pages. The number of pages depends on the type of review required.

To create an agreement
1. From the Dashboard, click the Create menu and then select Create Agreement.
2. Complete the pages. To move to the next page, click Continue.
3. On the last page, click Finish.

The workspace of the created agreement displays.

Note: You can continue to edit the agreement until you submit it for processing.

To submit an agreement
1. Check if all the information is accurate and complete.
2. On the left, click Submit.
3. Click OK to accept the statement and submit the agreement.
Assign An Ancillary Reviewer

You can add an organization or a person as an ancillary reviewer up until you submit the agreement.

To assign an ancillary reviewer

1. In the Top Navigator, click Agreements.
2. From the All Agreements tab, click the agreement name to open it.
3. On the left, click Manage Ancillary Reviewers.
4. Click Add.
5. Next to Organization or Person, click the ellipsis and then choose the specific organization or person. Click OK.
6. Complete rest of the form and click OK.
7. To add more reviewers, click OK and Add Another and repeat the steps.
8. Click OK when done.
Respond To Reviewer Requests

If a reviewer has questions or requires you to change your submission, you will receive an e-mail indicating this. Review the request details and then respond to the request.

To respond to reviewer requests

1. From My Inbox, click the agreement name to open it.
2. Click the History tab.
3. Look for the Clarification Requested activity and review any reviewer comments.
4. If required, click Edit Agreement on the left and make the changes.
   **Note:** You can enter a response for the reviewer before submitting.
5. Click Submit Changes.
6. In the Notes box, type a response to the reviewer's comments or questions.
7. Click OK.
Create An Amendment

You can create amendments for agreements in the Active, Expired, and Evergreen states. Only one amendment can be in progress at a time.

To create an amendment
1. In the Top Navigator, click Agreements.
2. On the All Agreements tab, click the name of the agreement to amend.
3. At the left of the workspace, click Create Amendment.
4. Add any comments and supporting documents you think necessary, then click OK.
5. At the left of the workspace, click Go to Amendment.
6. Click Continue to move to the next page, or use the left navigator to jump to a specific page, and make the necessary changes.
   Note: The Agreement creator has the same edit rights to the amendment as the Agreement Manager/PI.
7. When satisfied with your changes, click Save, and then Exit.
8. At the left of the workspace, click Submit to submit the Amendment for review.
9. Click OK to confirm the amendment is complete and correct.