How to Complete a Required Ancillary Review

Step 1: Log in to the system

Login to UT Research Management Suite - Agreements using your UT Austin EID. You will be required to complete Duo authentication to finalize sign-in.

The *Dashboard* (Personal Workspace) is your home base for all activities in UT Research Management Suite, including Required Ancillary Reviews. Items appearing in *My Inbox* are awaiting your action to move them forward in the workflow toward execution and Activation. If a workflow action requires you to complete an Ancillary Review, that record will appear in the *My Reviews* tab to the right of *My Inbox*.

Step 2: Access Record for Review

In the *My Reviews* tab, click the record to navigate to the *Record Workspace* for the item requiring review. You can also click the link embedded in the Ancillary Review notification email you received. “Assigned for ancillary review” appears in the subject along with the UTRMS number.

You will see your name and those of any other reviewers listed in the Ancillary Reviews section just below the Workflow Visualization bubbles. The Review type and Response Requirement is also indicated here.

You may be assigned to complete an Ancillary Review to provide additional scrutiny of the agreement submission in parallel with the central office review. Review types available in this system are:

Department
Faculty
IBC
Other
Radiation
Safety
Scientific

If your reviewer role is in support of the established review workflow for certain agreement types, such as the EHS review of all material transfer agreements, your organization name will also appear in the Ancillary Reviews section of the Record Workspace.

Step 3: Review Agreement

To view the information provided in the Agreement SmartForms, click ***View Agreement*** and/or ***Printer Version*** buttons. The same information is shown in each, though in different views. Click ***Exit*** and/or close the printer view tab to return to the *Record Workspace*.

Note that you are not authorized to edit the agreement as an Ancillary Reviewer. You may request changes through the *Submit Ancillary Review* activity (Step 4).

To view the agreement draft(s) (if generated), click either the file name appearing in the *Agreement* field directly below the agreement title in the top-center portion of the Record Workspace, or click on the ellipsis button directly after file. You may download a copy of the file, or click *View History* to view or compare prior drafts.

Step 4: Submit the Review

Click ***Submit Ancillary Review*** located in the left-side navigation area of the Record Workspace. A pop-up window will open, allowing you to answer the following:

1. ** Select the review you are submitting:*

Select the checkbox next to your name or organization, as applicable.

2. ** Do you accept the proposed agreements?*

Select ***Yes*** or ***No*** to either accept or decline the draft agreement information or language, as applicable. Click ‘Clear’ as needed to correct your selection.

3. *Comments*

Enter comments, feedback, necessary edits, or other comments for the Agreement Owner (Central Office Staff reviewer) in the free text box.

4. *Supporting Documents*

Upload any attachments here.

Click ***OK***.

Note: selecting *No* to question 2 here will return the agreement to the Agreement Owner for management of revisions by the Agreement Creator/PI. Repeat the above steps to continue the review as revisions are made until you are able to accept the proposed agreement.