



UT RESEARCH MANAGEMENT SUITE



The University of Texas at Austin
Office of the Vice President
for Research

WELCOME TO FUNDED AGREEMENTS: An Informational Webinar

Explaining the expanded functionality of UTRMS-Agreements, one module of UT's integrated electronic research management system

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Q&A Information

- Please use the Q&A window to submit your question to the panel. A panelist will respond and/or flag it for discussion.
- At the end of our program, we will further discuss questions as needed.



Content

- UTRMS Project Background & Timeline
- Expanded UTRMS-Agreements Module Functionality
 - What is meant by “Funded Agreements”?
 - Changes to Agreements-related Processes
- Resources for Help
 - Agreements Help Desk
- Question & Answer: Discussion

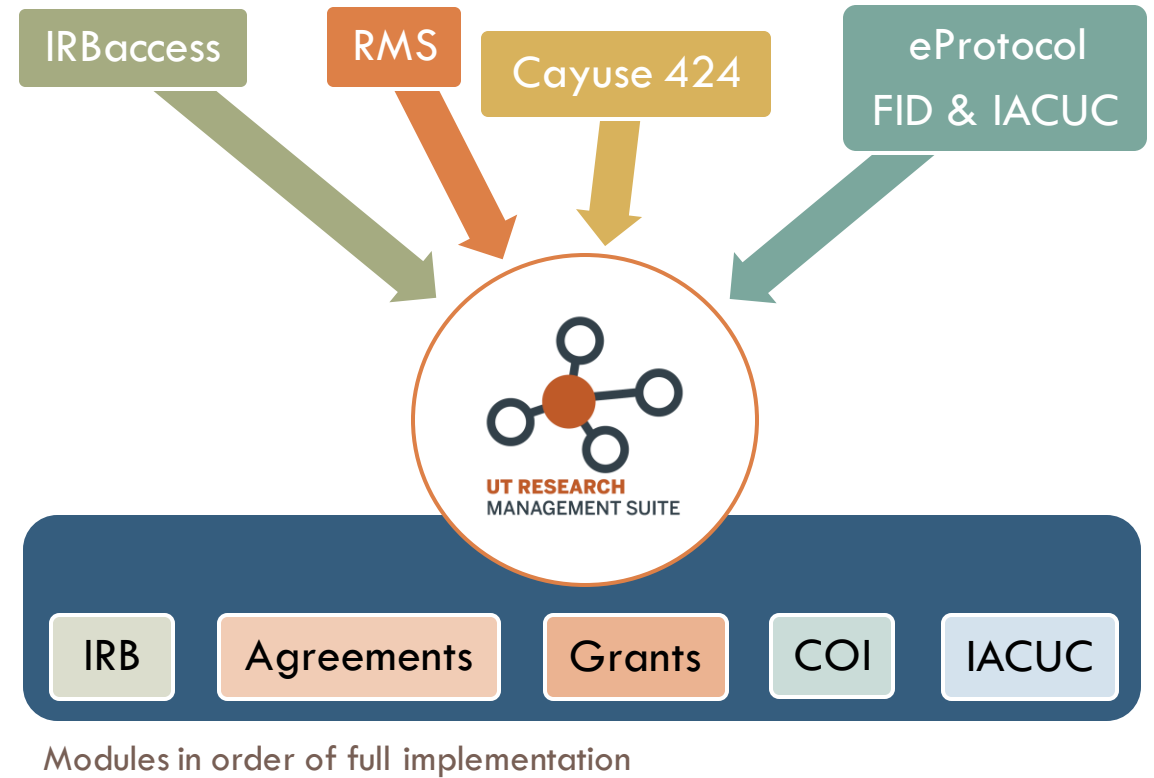


PROJECT BACKGROUND

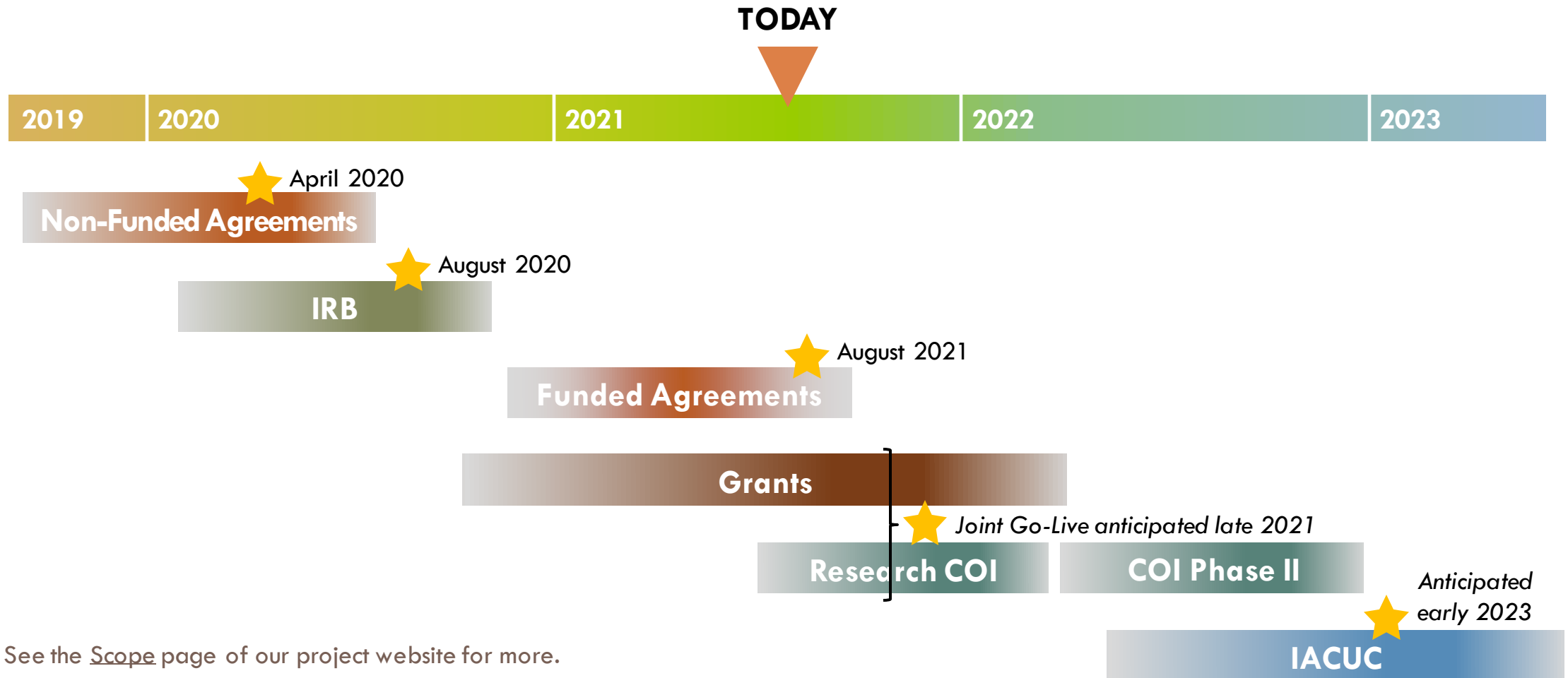


UTRMS Project Summary

- The Office of the Vice President for Research is overseeing the **replacement of mainframe-based legacy research applications** with an enhanced electronic Research Administration (eRA) system.
- The **UT Research Management Suite** will ultimately offer an **integrated suite of pre-award and compliance software tools**.
- A competitive procurement resulted in a vendor selection and phased implementation starting in Fall 2019.



UTRMS Project Schedule



UTRMS-Agreements vs. UTRMS-Grants Modules

Agreements

Negotiated sponsored project contract details, negotiations, and signatures

Funded launching now, August 2021.

Does **not** include Award set-up information or financial integration.

Applicable to **negotiated portion** of negotiated sponsored **contracts**, including subcontracts.

Grants

All funded award (grant & contract) basics, budgets, and financials

Launching late 2021.

Includes award set-up/finances.
DEFINE integration to come post-launch, in 2022.

Once launched, applicable to **every sponsored award** at UT Austin.



AGREEMENTS MODULE

Funded Agreements Launch

Beginning Monday, August 2nd,
sponsored project-related Agreements
will be requested, negotiated and
executed in UTRMS-Agreements,
now including **Funded Agreements.**

What constitutes a “Funded Agreement”?

What do we mean by “Agreement”?

A **negotiated** sponsored project-related contract entered into with an outside entity.

What is a “Funded” vs. a “Non-Funded” Agreement?

A Non-Funded Agreement is a non-financial (i.e. no exchange of funds) agreement facilitating the conduct of research or sponsored project work. Examples include Material Transfer, Non-Disclosure, Data Use/License, etc.

By contrast, a Funded Agreement is an agreement that **provides compensation in exchange for the conduct of research** or sponsored project work.

Which sort of agreements fall into the category of a Funded Agreement?

Funds-Coming-In & Outgoing Subawards, Sponsored Research Agreements (SRAs), Clinical Trials, Master Agreements, Industrial Affiliate Programs (IAPs), Various Donors Agreements (VDAs), and Research Participation Agreements (RPAs)

Note: IAPs, VDAs & RPAs will continue to be processed in RMS until launch of UTRMS-Grants later this year.

Which awards will be treated as "Funded Agreements"?

Funds-Coming-In Award Type	Contracts Review / UTRMS-Agreements	UTRMS-Agreements SmartForm Selection
Federal Contracts	Yes	Funded Agreement
State or Local Government Contracts	Yes	Funded Agreement
State or Local Government Grant Agreements	Yes	Funded Agreement
Sponsored Research Agreements	Yes	Funded Agreement
Non-profit / Foundation Grant Agreements	Yes*	Funded Agreement
Work Orders/Task Orders	Yes	Funded Agreement
Master Agreements	Yes	Master Agreement
Clinical Trial Agreements	Yes	Clinical Trial Agreement
Non-FDP Pass-Thru Subawards/Subcontracts	Yes	Funded Agreement
Industrial Affiliate Programs / Various Donors Agreements	No (until Nov 2021)	n/a
Federal Grants	No	n/a
Federal Cooperative Agreements	No*	n/a
Foundation Fellowships	No*	n/a
Personnel Assignment Agreements (IPAs) / Salary Agreements	No	n/a
FDP Pass-Thru Subawards	No	n/a

*Possible exceptions

New Agreements SmartForms

Applicable Aug. 2nd!

Subaward

Used **only for Funds-Going-Out**;
SmartForms replace Sub. Info. Sheet

Funded Agreement

Used for all Agreement types not
otherwise specified

Clinical Trial Agreement

Most often used by Dell Medical School

Master Agreement

Other Agreements under the Master
may be generated and linked

Not Yet Applicable!

Rolling out later this
year with Grants

Industrial Affiliate Programs

Will also be used for:

- Various Donor Agreements (VDAs)
- Research Participation Agreements (RPAs)

6. * Agreement type:

- Allocation of Rights
- Confidential Data Control Plan (CDCP)
- Clinical Trial Agreement
- Data Use Agreement
- Funded Agreement
- Industrial Affiliate Programs
- Master Agreement
- Material Transfer Agreement
- Memorandum of Understanding
- Non-Disclosure Agreement
- Subaward
- Teaming Agreement
- Technology Control Plan (TCP)
- Other Non Funded

8. Supporting documents:

Question #6 of Agreement Upload page

Funded Agreements Business Process Changes

	Current	New
Proposal Submission	PRF submitted in RMS	PRF submitted in RMS (No change <u>until launch of UTRMS-Grants, expected November 2021</u>)
Contract Set-up Information	Submitted via email with contract coordinator	Grants or OIE team will request that new agreement be submitted in UTRMS-Agreements, specifying SmartForm selection based on type; Agreement SmartForms will capture all details
Negotiation Details	Logged in RMS negotiation log	Logged in UTRMS-Agreements module
Award Information	Logged in RMS	Award details, negotiation, & fully-executed document logged in UTRMS-Agreements (Award funding still managed in RMS until launch of UTRMS-Grants)
Amendments	Requested variously, especially via email with contract coordinator	Active in RMS: central staff will populate a shell record, and draft an Amendment Active in UTRMS-Agreements: central staff will process an Amendment request (activity available to PI/DRA users in parent Agreement record)



AGREEMENTS RESOURCES

Agreements Help Desk

**You can speak with representatives from
OSP, OIE & the UTRMS Project Team
each Wednesday at 10 AM throughout August:**

Join Us on Zoom



If you're somewhat familiar with UTRMS-Agreements

I'd like to try troubleshooting
my issue myself

**Review the
available
Resources & FAQs**

We consider these
living resources, so
please suggest
improvements.



I'd like more personal help
with my specific issue or draft Agreement

**Please drop by the
Agreements Help Desk
on Wednesday at 10 AM**



If you're new to or less comfortable with UTRMS

I'd like to schedule a personalized
Agreements module training

**Complete the
Get In Touch form
on our website**

Support/Contact Us

Please make sure to
include some details on
who you'd like to join and
what you'd like to learn.

**Please also leverage the Get In Touch
web form to do all of the following:**

- Schedule other UTRMS training
- Provide feedback on this webinar, the Agreements module, or the project
- Ask further questions
- Submit a request to be added to our newsletter mailing list

Key Takeaways

- Expanded functionality of UTRMS-Agreements available August 2nd:
 - Funds-Going-Out Subawards are included
 - IAP/VDA/RPA-related agreements are not included, for now
- Proposal/PRF submission has not changed, until launch of UTRMS-Grants
- OSP or OIE team member will direct you to submit the applicable Funded Agreement SmartForm, as needed
- Please join us at the Agreements Help Desk on Wednesdays at 10 AM with your questions!



QUESTIONS?



THANK YOU