



Agreements Module Training Setup

MODULE DESCRIPTION:

The Click Portal Agreements module provides an electronic system for management of research-related contracts and agreements. The Agreements module ensures that all communication regarding agreements can be tracked within the system by forwarding your business emails to a unique email address.

Two offices at the University at Buffalo provide oversight for the agreements process. The Office of Sponsored Projects Services (SPS) partners with the University community to prepare and submit proposals for sponsored funding and provides stewardship of awarded funds to ensure compliance with applicable regulations and policies. The Office of Science, Technology Transfer, and Economic Outreach (STOR) negotiates and executes all Material Transfer Agreements (MTA) and Non-Disclosure Agreements (NDA) in keeping with the university's research guidelines and its obligations to federal research sponsors.

OBJECTIVES:

- Provide principal investigators, study staff, compliance and research administration staff an overview of the Agreements module
- Demonstrate how to:
 - Create an Agreement and submit it for review
 - Manage the Agreement review process
 - Obtain necessary signatures and activate an Agreement
- Allow the participants to practice with hands-on exercises
- Provide training materials and references that will provide assistance while using the Agreements module



TRAINING EXERCISES:

Agreements Module Exercises	Role(s)
Navigation Exercises	
• Exercise 1: Log into the Agreements Module	Any
• Exercise 2: Explore the Inbox	Any
• Exercise 3: Explore All Agreements	Any
• Exercise 4: Explore the Agreements Workspace	Any
• Exercise 5: Explore the SmartForm Pages	Any
Pre-Submission Exercises	
• Exercise 6: Create an Agreement	Principal Investigator
• Exercise 7: Submit an Agreement to Review	Principal Investigator
Unassigned Exercises	
• Exercise 8: Assign an Agreements Reviewer	Agreements Manager
Ancillary Review Exercises	
• Exercise 9: Manage Ancillary Reviews	Agreements Reviewer
• Exercise 10: Submit an Ancillary Review	Ancillary Reviewer
Communication Exercises	
• Exercise 11: Log Correspondence	Agreements Reviewer
• Exercise 12: Update Correspondence	Agreements Reviewer
In Review Exercises	
• Exercise 13: Request Clarifications	Agreements Reviewer
• Exercise 14: Respond to a Reviewer Request	Principal Investigator
• Exercise 15: Move the Agreement to External Review	Agreements Reviewer
• Exercise 16: Move the Agreement to Internal Review	Agreements Reviewer
• Exercise 17: Approve the Language of the Agreement	Agreements Reviewer
Signing Exercises	
• Exercise 18: Send the Agreement Out for Signature	Agreements Reviewer
• Exercise 19: Revise the Agreement	Agreements Reviewer
• Exercise 20: Convert the Agreement to PDF and Activate It	Agreements Reviewer



TRAINING MATERIALS:

Safety Module Instructor

- Agreements Module – Introduction PowerPoint
- Laptop or computer with hardwired Internet connection

Participants

- Agreements Module – Exercises
- Agreements Module – Sample Agreement
- Work Instructions:
 - Safety Protocol Workflow
 - Create and Submit a Safety Protocol
 - Respond to Clarifications Requested or Reviewer Notes
 - Create and Submit a Follow-On Submission

Equipment and Site Requirements

- LCD Projector
- Screen
- Laptops or computers with hardwired Internet connection (one per participant)

SYSTEM REQUIREMENTS:

User Accounts

Ensure that the following user accounts are created in the system with the necessary roles for training.

Role/User	User Name	Password
Principal Investigator	pi1 – pi25	1234
Agreements Manager	amgr1 – amgr25	1234
Agreements Reviewer	arev1 – arev25	1234
Ancillary Reviewer	anc1 – anc25	1234