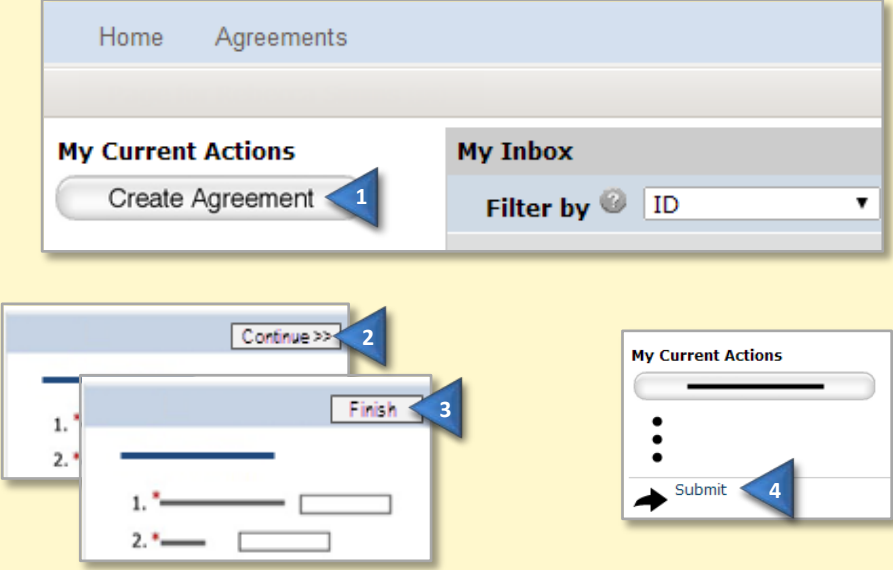


Click® Agreements PI Quick Reference

Submit an Agreement

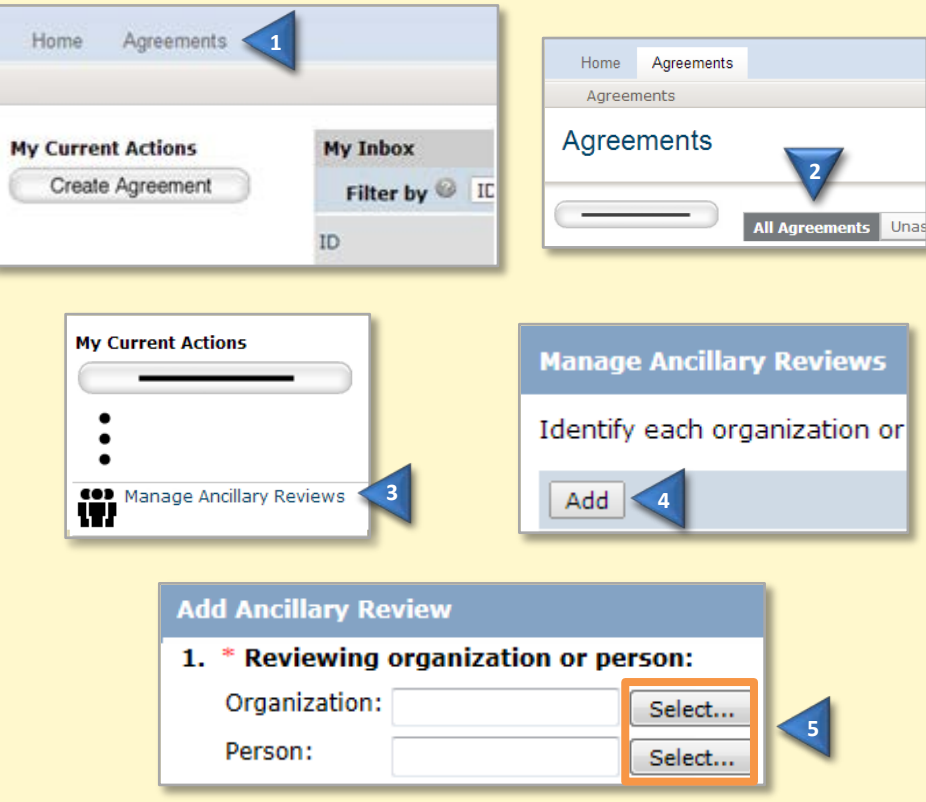


The screenshots illustrate the steps for submitting an agreement. Step 1 shows the 'Create Agreement' button in the 'My Current Actions' section. Step 2 shows the 'Continue >>' button on a form page. Step 3 shows the 'Finish' button on the final form page. Step 4 shows the 'Submit' button in the 'My Current Actions' section. Step 5 shows the 'OK' button on a confirmation dialog.

1. From My Inbox, click the **Create Agreement** button.
2. Complete the pages. To move to the next page, click **Continue**.
3. On the last page, click **Finish**.
4. On the left, click **Submit**.
5. Click **OK** to accept the statement and submit the agreement.

Assign an Ancillary Reviewer

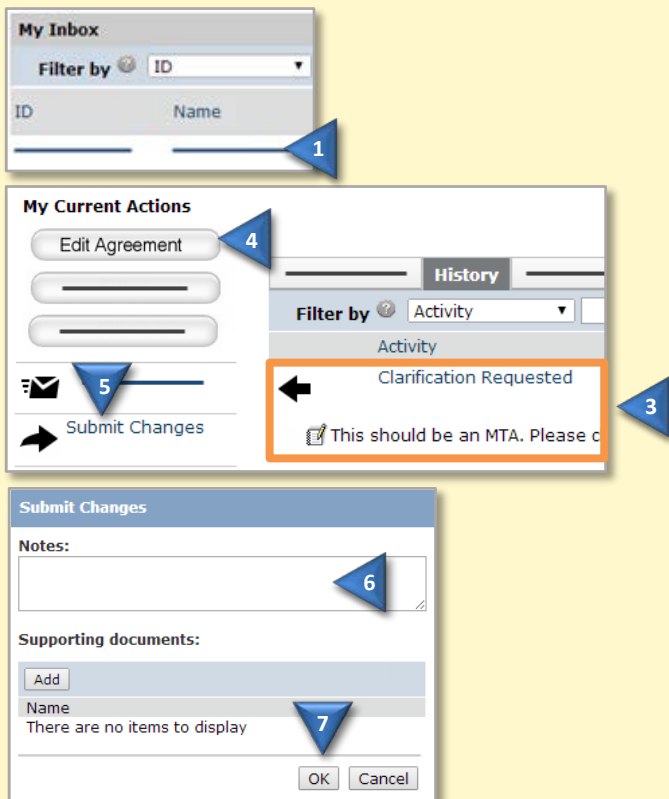
You can add an organization or a person as an ancillary reviewer up until you submit the agreement.



The screenshots illustrate the steps for assigning an ancillary reviewer. Step 1 shows the 'Agreements' link in the top navigation. Step 2 shows the 'All Agreements' tab selected. Step 3 shows the 'Manage Ancillary Reviews' button. Step 4 shows the 'Add' button. Step 5 shows the 'Select...' button in the 'Add Ancillary Review' form. Step 6 shows the form completion. Step 7 shows the 'Add' button for more reviewers. Step 8 shows the 'OK' button.

1. In the top navigation, click **Agreements**.
2. Click the **All Agreements** tab and then 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 **Select** and then choose the specific organization or person. Click **OK**.
6. Complete the rest of the form and click **OK**.
7. To add more reviewers, click **Add** and repeat the steps.
8. Click **OK** when done.

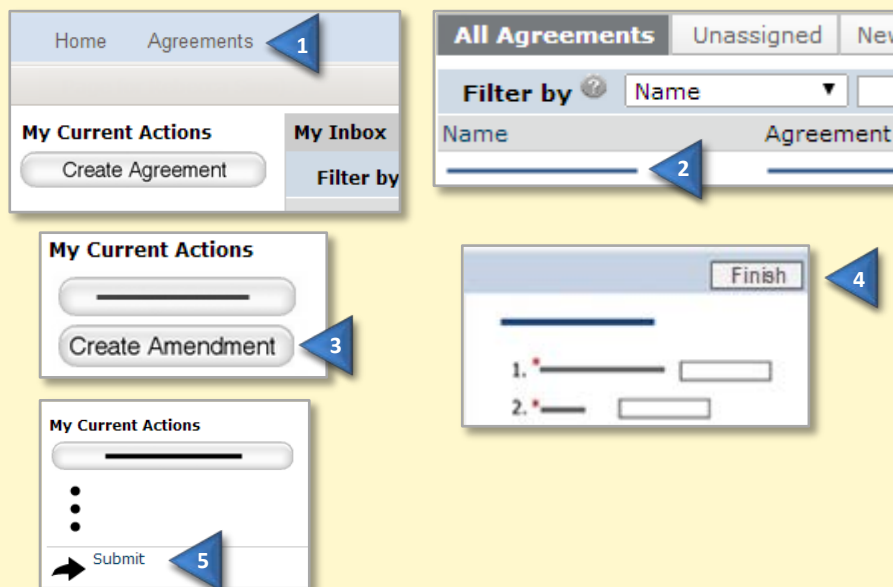
Respond to Reviewer Requests



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. To update the agreement, click **Edit Agreement** on the left and make the changes. If not, go to the next step. You will be able to enter a response for the reviewer before submitting.
5. Click **Submit Changes**.
6. (Optional) 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 for an agreement.



1. In the top navigation, click **Agreements**.
2. On the **All Agreements** tab, click the name of the agreement to amend.
3. On the left, click **Create Amendment** and complete the pages.
4. On the last page, click **Finish**.
5. On the left, click **Submit**.
6. Click **OK** to accept the statement and submit the amendment.