

Create and Submit an Unfunded Agreement

This document provides guidance on the process for creating and Agreement record within RAMP. Refer to the instruction below when ready to initiate the process.

Unfunded agreements can be initiated by all user types within RAMP. Below is a list of unfunded agreement types users may choose to create:

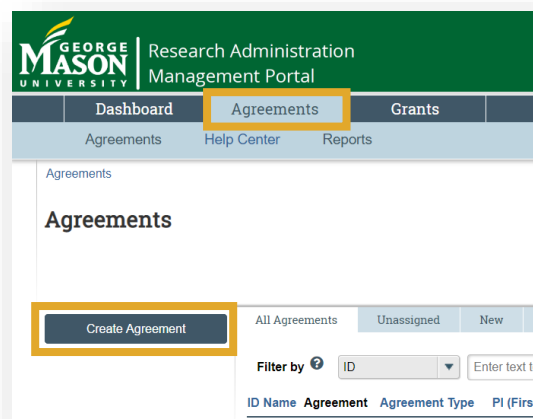
- Non-Disclosure Agreement
- Teaming Agreement
- Cooperative Agreement
- Data Sharing
- IDIQ that is not yet funded
- IP Agreement
- Data Sharing / DUA
- Material Transfer Agreement
- Unfunded MOU/Collaboration agreement
- Other Transaction Agreement

Funded agreements (contracts/grants), notice of award is sent to the [OSP central inbox](#), and an OSP specialist creates this type of agreement. Similarly, OSP creates agreements for **subawards**. Below is a list of funded agreement types that will be initiated by OSP:

- Grant
- Contract
- Outgoing Subaward
- Incoming Subaward (Mason not using)
- Task Order (Mason not using)

STEP 1: Navigate to the Agreements Workspace

- If you have not done so already, login to [RAMP Portal](#). Navigate to the **Agreements** Dashboard and select **Create Agreement**.



NOTE: You can also create an Agreement through the **Create Agreement** button in your inbox

STEP 2: Agreement Upload SmartForm

- Provide the requested information on the Agreement Upload SmartForm. The information provided here will help inform the subsequent SmartForms that should populate.

You Are Here: 🏠_ClickAgreement

Creating New: Agreement

◀ Go to forms

Agreement Upload

- 1. Agreement manager/Principal investigator:**
- 2. * Primary contact:**
Rebecca Simms (pi) ... ✕
- 3. * Upload agreement draft:** (or check the box below) ?
[None] Upload
 First draft to be generated internally?
- 4. Title or internal reference number:** ?

The Primary contact will receive all notifications.

If a draft agreement is available, upload here. If a draft agreement is not available, select the box for “First draft to be generated internally?”

- 5. * Agreement type:**
- 6. Description:**
- 7. Supporting documents:**

Name
There are no items to display

- Business Associate Agreement
- Data Sharing Plans
- Intellectual Property Agreement
- Master Agreement / IDIQ
- Material Transfer Agreement
- Non-Disclosure Agreement
- Outgoing Subaward
- Teaming Agreement
- Unfunded MOU/ Collaboration Agreement
- Visiting Professor Agreement
- Grant
- Contract
- Cooperative Agreement
- Incoming Subaward
- Intergovernmental Personnel Act
- Services Agreement
- Task Order
- Other Transaction Agreement

STEP 3: General Information SmartForm

- All Agreement types will include a General Information SmartForm step. On this SmartForm users should provide additional details about the contracting party and other agreement type agnostic information that is needed to further the review.

1. * Contracting party:

If you cannot find the organization in the list above, enter its information here:

Contracting party name:

nsf

2. * Contracting party contact name:

LaVurne Williams

3. * Contracting party contact e-mail:

LaVurne.Williams@fairfaxcounty.gov

4. Contracting party contact phone:

571-220-7119

5. Additional Contracting Parties?

Yes No [Clear](#)

* Contracting Parties:

+ Add

Organization	Write-in Organization	Contact Name	Contact Phone
--------------	-----------------------	--------------	---------------

Update

3 Phoenix, Inc.

When the contracting party is not found within the list of approved vendors, select TBD and include the name in the field below.

6. * Responsible department/division/institute: ?

School of Nursing

7. Agreements collaborators: (Institutional staff given read/edit permissions for this Agreement)

Name	E-mail	Phone
Karen Gentry	kentry4@gmu.edu	703-993-1000

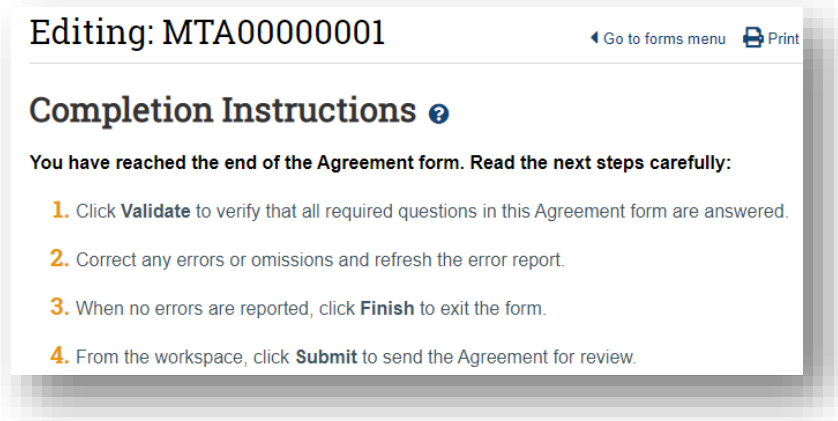
8. Other contracting party information (e.g. mailing address):

9. * Will there be an exchange of information, technology, or materials that is subject to U.S. export control laws and regulations including but not limited to the International Traffic in Arms Regulations ("ITAR", 22 CFR 120-130) and the Export Administration Regulations ("EAR", 15 CFR 300-799)?

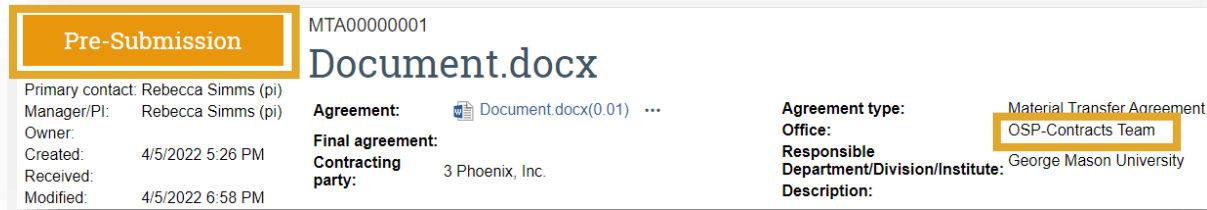
Yes No [Clear](#)

STEP 4: Completion Instructions for Creating an Agreement

After completing the remaining SmartForms, review the completion instructions and select **Finish**.



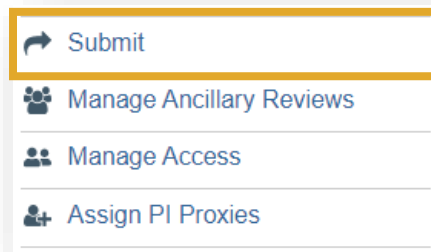
- The agreement will be in a **Pre-Submission** state and an OSP Contract team member will be assigned based on the agreement type selected.



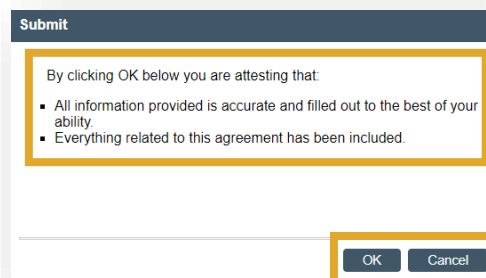
NOTE: In this state the PI and Study Team still have the ability to edit, as it has not yet been submitted to the office for reviewer assignment.

STEP 5: Submit the Agreement

- When the agreement is ready for submission, select **Submit** on the left side of the workspace.



- A pop-out will appear asking you to certify that all information included in the SmartForms is accurate and filled out to the best of your ability by selecting **OK**.



- The Agreement state and workflow map will update to reflect an Unassigned state. You will no longer be able to edit the agreement.

Unassigned

Primary contact: Rebecca Simms (pi)
 Manager/PI: Rebecca Simms (pi)
 Owner:
 Created: 4/5/2022 5:26 PM
 Received: 4/5/2022 7:18 PM
 Modified: 4/5/2022 7:18 PM
 Effective:
 Expires:

Next Steps

Edit Agreement

Printer Version

MTA00000001

Document.docx

Agreement: Document.docx(0.01) ...

Final agreement:
Contracting party: 3 Phoenix, Inc.

Agreement type: Material Transfer Agreement
Office: OSP-Contracts Team
Responsible Department/Division/Institute: George Mason University
Description:

Workflow:

```

      graph LR
      A[Pre-Submission] --> B[Unassigned]
      B --> C[In Review]
      C --> D[Signing]
      D --> E[Active]
      B --> B1[Clarification Requested]
      B1 --> B
      C --> C1[Clarification Requested]
      C1 --> C
      style B fill:#f96
      style C fill:#f96
      style B1 fill:#f96
      style C1 fill:#f96
      
```

- When in this state OSP Contracts Team will determine and assign the appropriate staff member to review and negotiate the agreement. Once an assignment has been made, the record will transition to an Internal Review State. The individual that has been assigned to review the agreement will now be listed as the Owner and will begin the process of reviewing the SmartForms and negotiating the agreement. A current version of the draft agreement will be available from the workspace.

Internal Review

Primary contact: Rebecca Simms (pi)
 Manager/PI: Mary Brown
Owner: Orlando Max (rev1)
 Created: 6/17/2021 4:21 AM
 Received: 11/1/2021 5:28 PM
 Modified: 12/30/2021 1:41 PM
 Effective:
 Expires:

Next Steps

View Agreement

MTA00000026

HRS_Test Agreement 01

Agreement: HRS_Test Agreement 01(0.01) ...

Final agreement:
Contracting party: Abbott Laboratories

Agreement type: Material Transfer Agreement
Office: General
Responsible Department/Division/Institute: Gastroenterology
Description: HRS_Test Agreement 01

Workflow:

```

      graph LR
      A[Pre-Submission] --> B[Unassigned]
      B --> C[In Review]
      C --> D[Signing]
      D --> E[Active]
      B --> B1[Clarification Requested]
      B1 --> B
      C --> C1[Clarification Requested]
      C1 --> C
      style C fill:#f96
      style B fill:#f96
      style B1 fill:#f96
      style C1 fill:#f96
      
```

- When in Unassigned or Internal Review an OSP Contract team member will have the ability to send the record to a Clarification Requested state to obtain any missing information or answer questions that need clarification. This will make the record editable to the PI and Study Team again to allow for any requested updates.

Clarification Requested

Primary contact: Carmen Alverado (coord)
 Manager/PI: Rebecca Simms (pi)
 Owner: Orlando Max (rev1)
 Created: 9/30/2021 12:45 PM
 Received: 10/7/2021 10:16 AM
 Modified: 10/12/2021 5:57 PM
 Effective:
 Expires:

Next Steps

Edit Agreement

CTA00000011

Inova Integration 10/5 Demo for Clinical Trial

Agreement: Inova Integration 10/5 Demo for Clinical Trial(0.01) ...

Final agreement:
Contracting party: Alliance Group

Agreement type: Clinical Trial Agreement
Office: General
Responsible Department/Division/Institute: Huron Consulting, Inc.
Description: Clinical Trial Agreement

Workflow:

```

      graph LR
      A[Pre-Submission] --> B[Unassigned]
      B --> C[In Review]
      C --> D[Signing]
      D --> E[Active]
      B --> B1[Clarification Requested]
      B1 --> B
      C --> C1[Clarification Requested]
      C1 --> C
      style C1 fill:#f96
      style B fill:#f96
      style B1 fill:#f96
      style C1 fill:#f96
      
```

- Users can track the negotiation of the agreement through to activation by referencing the states and workflow bubbles on the workspace. The current draft and final agreement are also accessible directly from the workspace:

Active

SUB00000006
SS_RAMP Agreement_7-2-2021

Primary contact: Ira Stein (man1)
Manager/PI: Rebecca Simms (pi)
Owner: Orlando Max (rev1)
Created: 7/2/2021 9:19 AM
Received: 7/2/2021 9:55 AM
Modified: 4/2/2022 12:00 AM
Effective: 7/2/2021
Expires: 7/1/2022

Agreement: [RAMP Agreement Tech Fix.doc\(0.02\) ...](#)
Final agreement: [RAMP Agreement Tech Fix.pdf\(0.02\) ...](#)

Contracting party: Abbott Laboratories

Agreement type: Subawards
Office: General
Responsible Department/Division/Institute: Huron Consulting, Inc.
Description:

Next Steps

[View Agreement](#)

[Printer Version](#)

```
graph LR; A[Pre-Submission] --> B[Unassigned]; B --> C[In Review]; C --> D[Signing]; D --> E[Active]; B --> B1[Clarification Requested]; B1 --> B; C --> C1[Clarification Requested]; C1 --> C;
```