

## Q1. What is eAgreements and how do I use this system?

[eAgreements](#) allows users to submit a variety of research agreements, including clinical trial agreements, clinical trial master agreements, clinical trial subcontracts, treatment-use agreements (compassionate use), flow-through agreements, subawards, grant-award agreements (GAA), and confidential disclosure agreements. [Pathfinder](#) is a tool created by UT Southwestern that allows users to explore processes with easy-to-use flowcharts that allow for dynamic paths and answers and assists users with properly routing agreements to the correct department on campus.

First-time users are required to complete the [eResearch Access Request Form](#) to be granted access to systems such as Velos, eIRB, eGrants, eAgreements and Topaz. For information on which systems are connected and how they route to certain applications, please reference the [SPA Software and Web Applications Guide](#).

- Access eAgreements via My UTSW tools page:

The screenshot shows the UT Southwestern Medical Center website. At the top left is the logo. To its right is a search bar with the text "Search this site" and a "Search" button. Below the logo is a navigation menu with items: About Us, Administration, Departments & Centers, Education, Hospital & Clinics, Human Resources, Research, Services, and Tools. The "Tools" item is circled in green with a red "2". Below the navigation menu is a breadcrumb trail: Home / Tools. Below that is a dark blue header with the word "Tools" in white. Underneath is a grid of links. The left column includes: A-Z Index, ADAPT, Archibus, Clinical Trials, Compliance Report, CORE LIMS, Doctor & Faculty Profiles, eAgreements (circled in green with a red "3"), eGrants, eIRB, Entrada, Find A Doctor, Focus On Faculty, and Health System Portal. The middle column includes: i2b2 Clinical Research Data Warehouse Study Feasibility Application, Kronos, Library, MyChart, myTime Login, Net Guide, ORBIT - UTSW Reporting Portal, Outlook Web App (Children's), Outlook Web App (Parkland), Outlook Web App (UT Southwestern), Pathfinder, PeopleSoft, Phone Directory, Policy Library, and Procurement Portal. The right column includes: Profile+ (Updates to faculty profiles), ReadySet, REDCap, Research Portal, Talent Acquisition Management, Taleo Learn, TOPAZ, Total Professional Effort, TracDat, UTSW ServiceNow, Velos, and Web Resources. Under Web Resources, there are three bullet points: Faculty (Faculty Corner), Postdocs (Graduate School of Biomedical Sciences), and Students.

- Or access eAgreements via the SPA Research Systems page:

**UT Southwestern Medical Center** For Employees

Search this site All Search


Home > For Employees > Sponsored Programs > Tools & Resources

Basic Science Clinical Research Compliance & Operations Education & Training News & Events **Tools & Resources** Contact Us

## Tools & Resources


SPA has compiled resources to help you manage sponsored awards, agreements, and contracts throughout the award life cycle.

**Tools and Resources Require Login**  
If you are not on campus or VPN, you will be prompted for your username and password to view Tools & Resources.




**Research Systems**

Discover the precise systems to use when submitting a proposal, executing a contract, managing an award, and more.



**Claim Your Research Payments**

Search our database that contains information about unapplied cash payments for your research endeavors.



**Basic Science**

Access helpful guidance and tools from the proposal submission stage to the award closeout phase of the award life cycle.

**How are we doing?**

- % Proposals Reviewed in 4 days: 100% Goal
- Avg. Days to Set up Award: 2.0 Goal
- Avg. Days to Close SN Ticket: 3.0 Goal

[See Full Metrics](#)

## Systems

For information on which systems are connected and how they route to certain applications, please reference the [SPA Software and Web Applications Guide](#).

**[CPRIT Grants Management System \(CGMS\)](#)**  
CGMS allows applicants to submit proposal applications to the Cancer Prevention and Research Institute of Texas (CPRIT), manage award documents, and request award modifications (such as re-budgets and carry-forward requests).

**[ClinCard](#)**  
ClinCard by Greenphire is a web-based platform that allows users to manage clinical research participant payments.

**[COI-SMART \(VPN Required\)](#)**  
COI-SMART provides comprehensive tools for tracking and managing Conflicts of Interest (COI) disclosures. The online system makes for easy, smart, and effective tracking, and management of conflict-of-interest disclosures.

**[eAgreements](#)**  
eAgreements allows users to submit a variety of research agreements, including clinical trial agreements, clinical trial master agreements, clinical trial subcontracts, treatment-use agreements (compassionate use), flow-through agreements, subawards, grant-award agreements (GAA), and confidential disclosure agreements. [Pathfinder](#) assists users with properly routing agreements with the correct department at UT Southwestern.

**[eGrants](#)**  
eGrants is an electronic system for the submission and tracking of funding proposals and related budgets, as well as award setup, management, and closeout. Information from eGrants flows to PeopleSoft as part of the award setup process. For more information regarding eGrants training sessions, please visit the [AAIR Services Page \(VPN Required\)](#).

- You will be taken to the eAgreements Home Page. Here, you may access the Contracts and Agreements Pathfinder (CAP) if you need assistance with determining the contract type and which UTSW office will manage your agreement (i.e.- SPA, OTD, OCM). Log in to eAgreements using your UTSW user ID and password.

**External Links**

- Contracts and Agreements Pathfinder (CAP)
- Office for Technology Development
- Sponsored Programs Administration
- Taleo Training Registration
- Velos

**Home**

Welcome to eAgreements

This is the home page for the following system:

- eAgreements**-The UT Southwestern electronic system for requesting, processing and tracking of research agreements, including but not limited to: clinical trial, treatment use, flow through, subawards, material transfer, collaboration, industry sponsored non/pre/post-clinical, data use/transfer, visiting scientist, and confidential disclosure.

SmartForms are automatically routed via eAgreements to the appropriate contracting office (Sponsored Programs Administration or Cooperative & Sponsored Research/Technology Development) for drafting/review, negotiation, approval, signature and activation. Notification of any required actions, activation and expiration of the agreement are sent by the system.

If you are unsure which agreement type is needed, please follow the link below to Contracts and Agreements Pathfinder (CAP) <https://ais.sommed.edu/pathfinder/>. Pathfinder allows users to work through a flowchart to accurately identify the appropriate system and agreement type.

**To get started**

1. Log in using your User ID and password, which are the same credentials you use to log in to Outlook.
2. Click on the **My Inbox** link at the top left of your screen to view your Personal folder.
3. Then, select **Create Agreement** to initiate an agreement with the eAgreements SmartForm.

You will receive email notifications from the appropriate office if changes are required to your submitted documents.

The UT Southwestern Sponsored Programs Administration and Office for Technology Development understand that any new software application can be intimidating at first. Our staff is here to provide you with training and technical assistance to make the process as easy and convenient as possible for you.

Please note: This is a production system. Please do not use it for testing purposes.

If you are having difficulty accessing your account, please call 8-7600 and open a Service Desk ticket. For any other questions or concerns please open a Service Desk ticket at 8-7600 or email at [ServiceDesk@UTSouthwestern.edu](mailto:ServiceDesk@UTSouthwestern.edu) or your SPA or OTD specialist.

- Once logged in, users are directed to the Dashboard page and can view their inbox (containing agreements the user has initiated or to which access has been granted), as well as the option to create an agreement or see recently viewed projects for quick access. Please note, the help option is accessible in the upper right-hand menu for assistance with navigating the dashboard and the agreements page, as well as creating/submitting an agreement.

**UT Southwestern Medical Center eAgreements**

Dashboard Home Agreements Materials Remote Systems

Components Help

Create ▾ My Inbox

Filter by ID Enter text to search for + Add Filter X Clear All

No data to display

Recently Viewed Projects

My Reviews

Filter by ID Enter text to search for + Add Filter X Clear All

No data to display

- By selecting the Agreements option in the main menu bar, users have access to agreements, reports, the help center, ability to create an agreement, and the option to search agreements in their queue by status (Unassigned, New, In Progress, Active, Evergreen and Archived).

**UT Southwestern Medical Center eAgreements**

Dashboard Home Agreements Materials Remote Systems

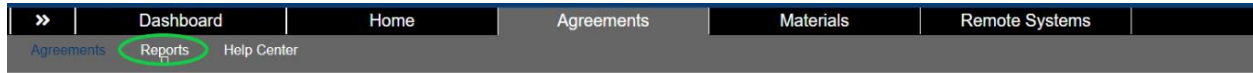
Agreements Reports Help Center

**Agreements**

Create Agreement

All Agreements Unassigned New In Progress Active Evergreen Archived

- Users may access both Standard and Custom Reports from the Reports tab, under the Agreements tab.



## Reports

Standard Reports Custom Reports

Name

Report: Agreements by submitter

Report: Agreements by primary sponsor

Report: Agreements that are active with evergreen clauses

Report: Agreements set to expire in next 60 days

Report: Agreements ad hoc report

Report: Agreements activated in last 60 days

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## Reports

Standard Reports Custom Reports

**SSRS Reports**

UTSW Ancillary Report

UTSW Agreements Turnaround Report

- The Help Center contains both Quick Reference and Video resources to assist users with how to submit a variety of agreements.



## Help Center

Quick Reference Videos

**Export**

Name	Description
Agreement State Transitions	UTSW eAgreements State Transitions
Agreement Types	UTSW Agreement Types
Agreements Researcher's Guide	A guide for researchers and agreement submitters that includes steps for submitting a new agreement or amendment and responding to reviewer clarification requests.
Agreements Reviewer's Guide	A guide for those assigned to review an agreement that includes steps for submitting an ancillary review.
Agreements Staff Guide	A guide for Agreements office staff that includes the Agreements workflow along with steps for tracking and managing reviews and finalizing agreements.
Clinical Trial Agreement Submission Guide	UTSW Clinical Trial Agreement Submission Guide
Clinical Trial Master Agreement Submission Guide	UTSW Clinical Trial Master Agreement Submission Guide
Clinical Trial Subcontract Submission Guide	UTSW Clinical Trial Subcontract Submission Guide
Collaboration Research Agreement Submission Guide	UTSW Collaboration Research Agreement Submission Guide
Confidential Disclosure Agreement Submission Guide	UTSW Confidential Disclosure Agreement Submission Guide

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For information regarding navigation and basic tasks, creating and submitting an agreement, assigning an ancillary reviewer, responding to a clarification request, or creating and submitting an amendment, we recommend referencing the [eAgreements Researcher's Guide](#) from the Help Menu in eAgreements. Additionally, please reference submission guides by agreement type in the eAgreements Help Center:

Name	Description
Data Use Agreement Submission Guide	UTSW Data Use Agreement Submission Guide
Flow Through Agreement Submission Guide	UTSW Flow Through Agreement Submission Guide
Grant Award Agreement Submission Guide	UTSW Grant Award Agreement Submission Guide
Industry Flow Through Agreement	Industry Flow Through Agreement
Material Transfer Agreement - Providing Submission Guide	UTSW Material Transfer Agreement - Providing Submission Guide
Material Transfer Agreement - Receiving Submission Guide	UTSW Material Transfer Agreement - Receiving Submission Guide
Research Service Agreement Submission Guide	UTSW Research Service Agreement Submission Guide
Sponsored Research Agreement Submission Guide	UTSW Sponsored Research Agreement Submission Guide
Subaward Agreement Submission Guide	UTSW Subaward Agreement Submission Guide
Treatment Use Agreement Submission Guide	UTSW Treatment Use Agreement Submission Guide

## Resources

[IR eAgreements Information](#)

[eAgreements: PI/Department End User Training](#)

[eAgreements Researcher's Guide](#)

[eAgreements Reviewer's Guide](#)

[eAgreements Staff Guide](#)

[SPA Research Systems Webpage](#)

[SPA Software and Web Applications Guide](#)

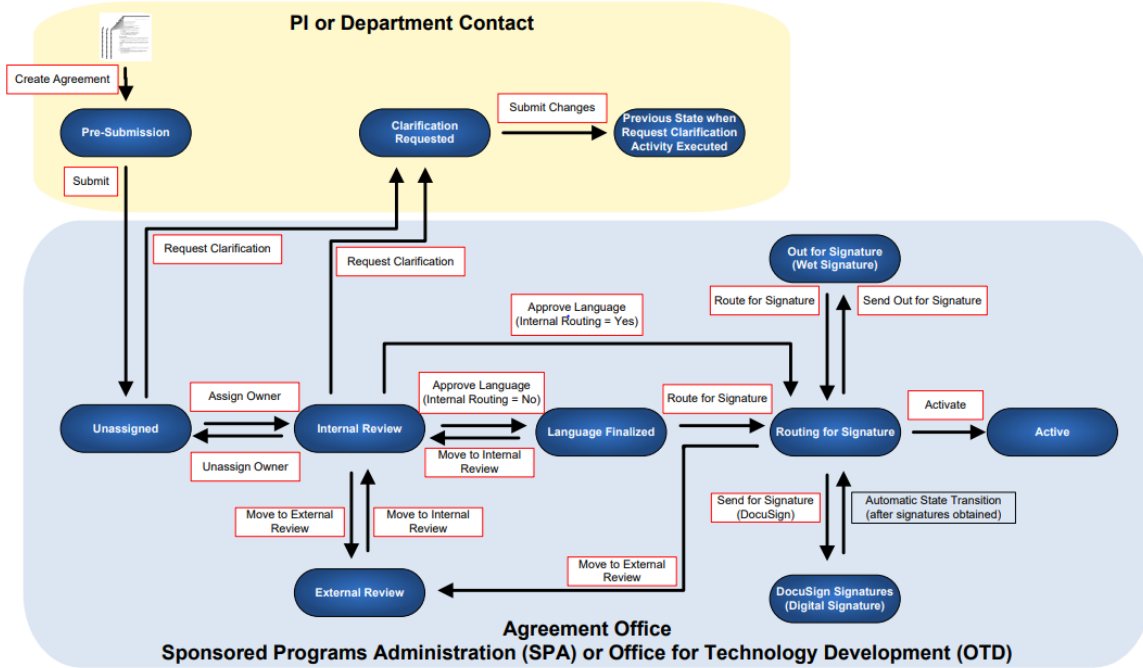
[SPA Non-Industry Agreements Webpage](#)

[SPA Industry Agreements Webpage](#)

[Clinical Research Services Overview Taleo Module](#)

[Agreement Types](#)

# eAgreements Workflow



Note: Amendments follow a similar workflow to agreements.

