

Q2. How do I initiate an agreement in eAgreements?

From the **Tools** page on the UTSW website, select **eAgreements**.

The screenshot shows the UTSW Medical Center website. The top navigation bar includes 'About Us', 'Administration', 'Departments & Centers', 'Education', 'Hospital & Clinics', 'Human Resources', 'Research', 'Services', and 'Tools'. The 'Tools' menu item is highlighted with a green box. Below the navigation bar, the 'Tools' page is displayed with a blue header. The main content area lists various tools in three columns. The 'eAgreements' link is highlighted with a green box, and a green arrow points from the 'Tools' menu item to it.

A-Z Index	i2b2 Clinical Research Data Warehouse Study Feasibility Application	Profile+ (Updates to faculty profiles)
ADAPT	Kronos	ReadySet
Archibus	Library	REDCap
Clinical Trials	MyChart	Research Portal
Compliance Report	myTime Login	Talent Acquisition Management
CORE LIMS	Net Guide	Taleo Learn
Doctor & Faculty Profiles	ORBIT – UTSW Reporting Portal	TOPAZ
eAgreements	Outlook Web App (Children's)	Total Professional Effort
eGrants	Outlook Web App (Parkland)	TracDat
eIRB	Outlook Web App (UT Southwestern)	UTSW ServiceNow
Entrada	Pathfinder	Velos
Find A Doctor	PeopleSoft	Web Resources
Focus On Faculty	Phone Directory	<ul style="list-style-type: none">Faculty (Faculty Corner)Postdocs (Graduate School of Biomedical Sciences)Students
Health System Portal	Policy Library	
iLab Operations	Procurement Portal	

Login to [eAgreements](#) using your UTSW credentials.

The screenshot shows the eAgreements login page. The top navigation bar includes 'Home'. The main content area is titled 'Home' and 'Welcome to eAgreements'. It contains a message about the system and a list of steps for getting started. A green box highlights the 'Login' button in the top right corner.

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://als.swmed.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 or your SPA or OTD specialist.

Login

Login as

User Name:

Password:

Login

After signing into this site, you are bound by the terms and conditions set forth when you received your account.

Click **Create** to **Create Agreement**.

UT Southwestern Medical Center eAgreements

Dashboard Home Agreements Materials Remote Systems

Components Help

Create Agreements

Create Agreement

My Inbox

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

Name	Date Created	Date Modified	Department	Division	Office	State	Coordinator Last	Coordinator First
					Sponsored Programs Administration	Unassigned		
					Sponsored Programs Administration	Unassigned		

page 1 of 1 25 / page

My Reviews

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

No data to display.

page 1 no results 10 / page

Fill in all required fields, as indicated by the red asterisk.

Next, select the correct agreement under question **5.0 Agreement type**. This will automatically select the correct smart form for you to complete.

Agreement Upload

* 1.0 Principal Investigator: ✓

* 2.0 Entered by (Department Contact, Department Administrator, Study Coordinator, etc.):
Fifi Price

2.1 Co-Investigator: ✓

* 3.0 If you have an agreement draft, upload it here. Otherwise, check the "UT Southwestern to generate first draft" box: Choose File ✓

UT Southwestern to generate first draft?

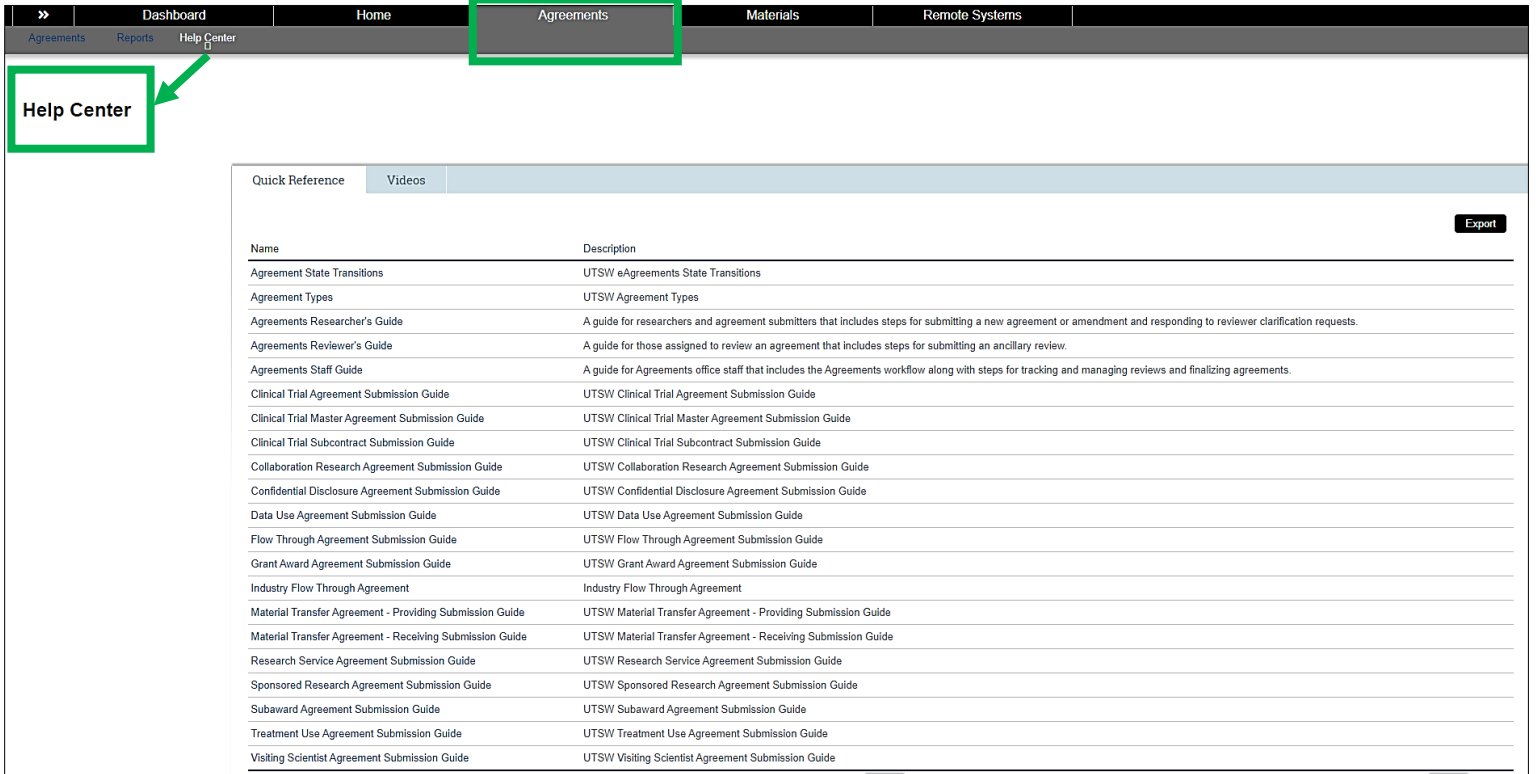
* 4.0 Provide a short name for the agreement: ✓

* 5.0 Agreement type: ✓

- Data Use Agreement
- Sponsored Research Agreement
- Collaboration Research Agreement
- Confidential Disclosure Agreement
- Flow Through
- Subaward
- Clinical Trial Master Agreement
- Clinical Trial Agreement
- Treatment Use Agreement (Compassionate Use)
- Clinical Trial Subcontract
- Visiting Scientist Agreement
- Master Research Agreement
- Other Agreement
- Multiple Material Transfer Agreement
- Research Service Agreement
- Grant Award Agreement
- SPA Miscellaneous Agreement
- Industry Flow Through Agreement

Continue through each page of the smart form. On the last page of the form, click **Submit** to route the agreement to SPA for review.

You will find additional aids and walkthrough explanations for various contract agreement types in the [Help Center](#) on the Agreements homepage.



Dashboard Home **Agreements** Materials Remote Systems

Agreements Reports Help Center

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
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
Visiting Scientist Agreement Submission Guide	UTSW Visiting Scientist Agreement Submission Guide