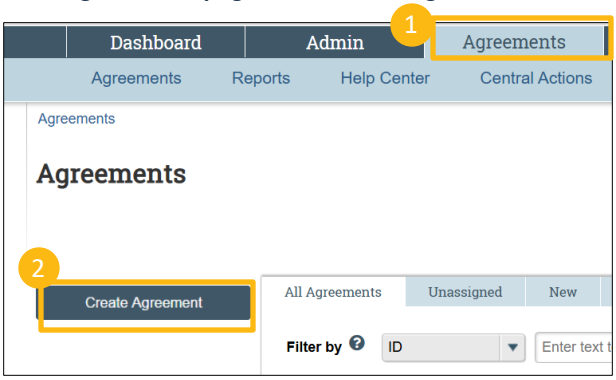
Quick Reference Guide

Create and Submit a Funded Agreement

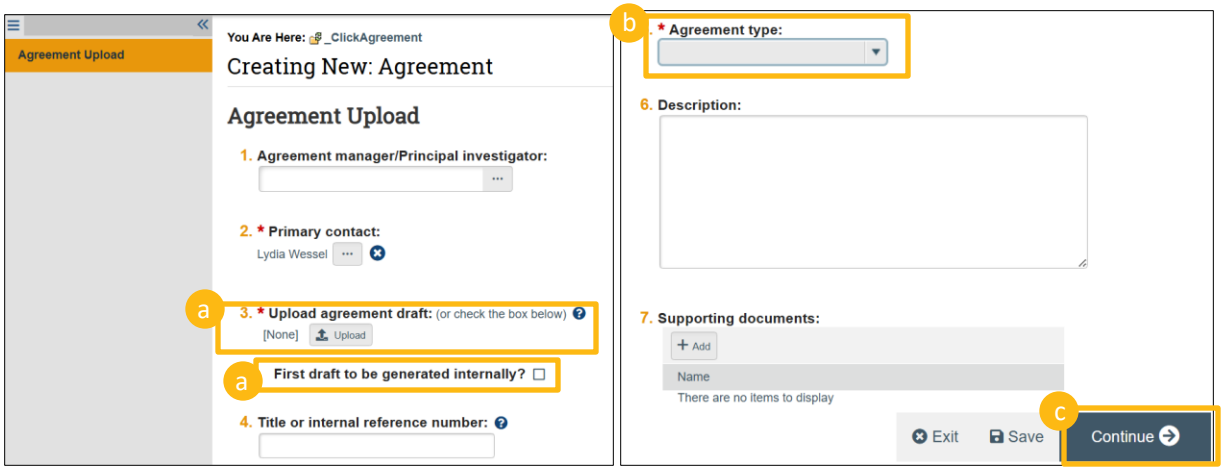
RAs

Funded agreements may include a Clinical Trail Agreement (CTA), Incoming Subawards, or Outgoing Subawards. If you have a funding proposal related to this submission, the best practice is to create the agreement from the funding proposal workspace and click Create Agreement. Alternatively, you can follow the process below.

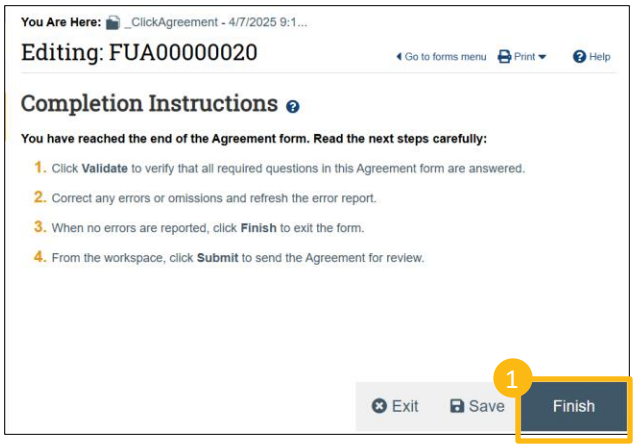
1. **From the Agreements page, click, Create Agreement.**



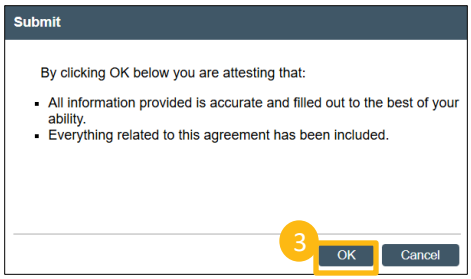
2. **Complete all required fields on the Agreement Upload page.**
   a. **For question 3, if the agreement document has already been drafted, you can attach it by clicking the Upload button. However, if OSP will create the first draft of the agreement, check the "First draft to be generated internally?" box instead.**
   b. **For question 5, select the appropriate funded agreement type.**
   c. **After completing this page, click Continue and enter all information in the following pages.**



3. **Depending on the agreement type you have selected, various agreement type-specific pages will appear for completion. On the last page, follow the completion instructions and click Finish. From the agreement workspace, click Submit, then Ok to submit the funded agreement for review.**







Create and Submit a Funded Agreement

4. To link the funded agreement to a proposal or award, from the project workspace page, click Manage Relationships from the left panel. On the Manage Relationships form, begin typing the agreement ID or agreement name under Related submissions and select it from the list of matches. Alternatively, you can click the ellipses to browse for the agreement and select all that apply. Add in any relevant comments or supporting documents and click Ok. The list of agreements you've added will appear on the manage relationships form. To view all the relationships managed, click the Related Projects tab at the bottom of the workspace.

Note: if the agreement has been initiated NOT from the funding proposal or award workspace, reference the managing relationships job aid for details on how to manage a relationship.

