

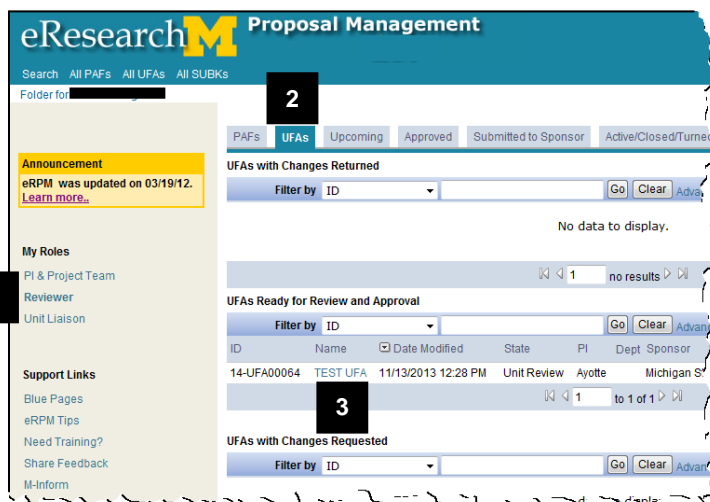
Review an Unfunded Agreement (UFA)

Unfunded Agreements (UFAs) submitted in eResearch Proposal Management (eRPM) will automatically route to the appropriate parties for review based on the Agreement Category. If Unit Approval is required, it will route to the Contact PI's Administrative Home indicated before routing to the Central Office.

Important Information

- Notifications that a project is ready for review will be sent to the **UFA Email Notification** group(s) for all levels in the Administrative Home.
- When Unit Approval is required, only ONE approval is needed. *Any* approver at *any* level of the administrative home stream may approve.
- Only individuals in the "Reviewers Who Can Sign" set can approve an UFA. This set is maintained by the Unit Liaison.

Home Workspace

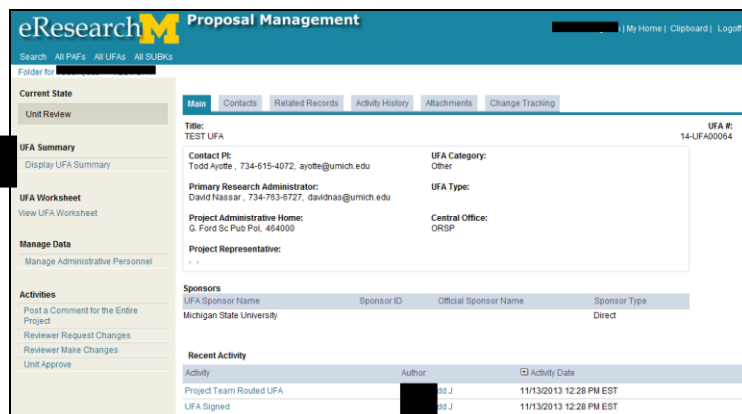


If you are accessing the UFA by clicking the link in the email notification, skip to step 4.

1. Verify that **Reviewer** is selected under **My Roles**.
2. Click the **UFAs** tab.
3. Click the **Name** of the UFA in the **UFAs Ready for Review and Approval** list.

Note: The UFA workspace opens.

UFA Workspace



4. Click **Display UFA Summary** to review the UFA details in summary form.

Notes:

- If you would like to view the complete UFA worksheet, click **View UFA Worksheet**.
- If you wish to make changes to the UFA or would like the Project Team to make changes to the UFA, see the [Additional Review Activities](#) section.

UFA Summary

- Review the information on the UFA Summary page, and then click **OK** to return to the UFA workspace.

UFA Workspace

- Click **Unit Approve**.
- Enter **Comments**, if desired.
- Click **OK**.

The **Unit Approved** activity is recorded in the **Recent Activity** list and the UFA is routed for Central Office review.

Additional Review Activities

Request Changes from Project Team

Activities Menu – UFA Workspace

- Click the **Reviewer Request Changes** activity.
- Describe the changes you are requesting in the **Comments** field.
- Click **OK**.

Notes:

- The UFA state changes to **Project Team Making Changes** and a notification is sent to the Project Team. The UFA record also moves to the **UFAs with Changes Requested** list on the **UFAs** tab.
- Once the Project Team submits the requested changes, the **UFA Email Notification** group will receive an email and the UFA record will display in the **UFAs with Changes Returned** list on the **UFAs** tab.

Reviewer Make Changes

Activities Menu – UFA Workspace

1. Click the **Reviewer Make Changes** activity.
2. (Optional) Enter a reason for making changes in the **Comments** field.
3. Click **OK**.

The state of the UFA changes to **Reviewer Making Changes** and the UFA Worksheet becomes editable.

Activities Menu – UFA Workspace

4. Click **Edit UFA Worksheet** and make the desired changes.
5. Click **Reviewer Submit Changes**.
6. Select the **Change Type**.
7. Enter a **Reason for Change**.
8. Click **OK**.

The state of the UFA changes to **Unit Review**.