



Agreements - Quick Guide

How to Create a No Money Agreement
and Submit to SPA for Review

Version 1: 7/25/20



The University of Vermont

UVMClick - Agreements

No Money Agreements

Go Live July 27th

Deliver to SPA thru UVMClick - Agreements

Agreement Types	Code	Funding
Business Associate Agreement	BAA	no money
Cooperative Research and Development Agreement	CRADA	no money
Data Use/Data Sharing Agreement	DUA	no money
Education Partnership Agreement	EPA	no money
Facility/Equipment Use Agreement	FAC	no money
Master Agreement	MA	no money
Memorandum of Understanding	MOU	no money
NIH Certificate of Confidentiality	CC	no money
No Money Collaboration Agreement	NMCA	no money
Non-Disclosure/Confidential Agreement	CDA	no money
Other No Money Agreement	OTNM	no money
Teaming Agreement	TA	no money

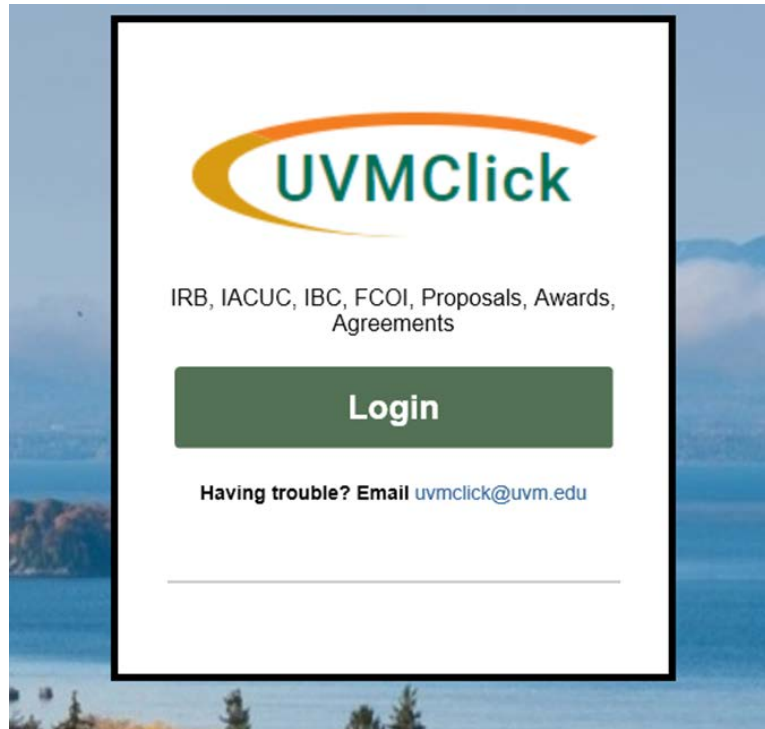
Money Agreements

Until Otherwise Notified

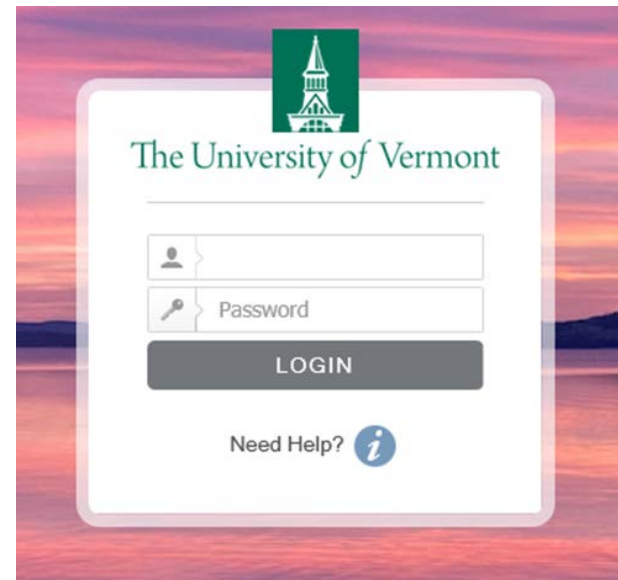
Deliver to SPA by sending to spa@uvm.edu

Agreement Types	Code	Funding
Contract	CON	money
Cooperative Agreement	COOP	money
Grant	GRT	money
Incoming Subaward/Subcontract	SUB	money
Intergovernmental Personnel Agreement	IPA	money
Other Award Notice	OTH	money
Purchase Order	PO	money
Sponsored Research Agreement	SPA	money
Task Order/Work Order	TO	money

Create and Deliver to SPA
Login: UVMClick



Duo



Create Agreement

The screenshot shows the UVMClick interface. At the top left is the UVMClick logo. Below it is a navigation bar with tabs: My Inbox, Site Administration, Agreements, COI, Facilities, and Grants. The 'Agreements' tab is circled in red, with a red arrow pointing to it and a yellow box labeled '1. Click'. Below the navigation bar is a secondary bar with links for Agreements, Help Center, and Reports. The main content area is titled 'Agreements' and features a 'Create Agreement' button circled in red, with a red arrow pointing to it and a yellow box labeled '2. Click'. To the right of the button are tabs for agreement statuses: All Agreements, Unassigned, New, In Progress, Active, Evergreen, and Archived. Below these tabs is a search filter section with a dropdown menu set to 'PI (Last)', a search input field containing 'prindle', and buttons for '+ Add Filter' and 'x Clear All'. At the bottom is a table with the following data:

ID	Name	PI (First)	PI (Last)	Submitting Dept	Agreement Type	State	Contracting Party
DUA00000001	sare 2020	Brian	Prindle		Data Use/Data Sharing Agreement	Pre-Submission	3M Company

Complete SmartForms

1

UVMClick New: Agreement

You Are Here: Agreement

« Back Save Print Continue »

Agreement Upload

1. * PI/Agreement Manager: **SmartForm**

2. * Agreement Creator: Brian Prindle

3. * Upload draft agreement: [None]

Or if a draft agreement is not available, check the box and contact SPA to initiate Agreement. For Template Agreements see [SPA Forms Library](#)

4. * Short Title:

5. * Agreement Type:

6. Upload Supporting Documents:

Name
There are no items to display

2

UVMClick Edit: Agreement - TA0000001

You Are Here: Non Disclosure Agreement with ...

« Back Save Exit Hide/Show Errors Print Jump To Continue »

General Information

1. * Direct Sponsor/Contracting Party

If you cannot find the organization in the list above, enter its information here:
Sponsor/Contracting Party Name:

2. Prime Sponsor/Contracting Party (if any):

3. * Direct Sponsor/Contracting Party contact name:

4. * Direct Sponsor/Contracting Party contact e-mail:

5. Direct Sponsor/Contracting Party contact phone:

6. Add Team Members (other than the PI/Creator) who require read/edit rights:

Name	E-mail	Phone
There are no items to display		

3

UVMClick Non Disclosure Agreement with ...

You Are Here: Non Disclosure Agreement with ...

« Back Save Exit Hide/Show Errors Print Jump To Finish »

Agreement Information

1. * Responsible Department:

2. * Deadline: Yes No

3. * Does the Agreement provide funding to support the project? Yes No

4. Enter Sponsor/Contracting Party Agreement ID #:

5. Provide any information that will help us understand the purpose of the agreement:

Click (yellow box with red arrow pointing to the Finish button)

Finish (button circled in red)

Submit to SPA

Pre-Submission TA00000001

Non Disclosure Agreement with IBM

Created by: Brian Prindle
Agreement Manager: Brian Prindle
Owner:
Created: 7/13/2020 4:23 PM
Received:
Modified: 7/15/2020 2:49 PM
Effective:
Expires:

Agreement: FY20 Faculty Oreintation Research Administration.DOCX(0.01)

Agreement type: Teaming Agreement
Office: Sponsored Project Administration
Description:

Final agreement:
Supporting documents: There are no items to display

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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;
```

There are no Ancillary Reviews to show at this time.

Communication History Contacts

Correspondence

Due Date Enter text

Next Steps

- Edit Agreement
- Printer Version
- View Differences
- View All Correspondence
- Submit**

Submit

You Clicked "Finish" on the last Smartform and land on the "Workspace". The state is in "Pre-submssion".

Click "Submit" and the Agreement will be sent to SPA for assignment /review.

Summary

Submit an Agreement

1 Create Agreement

My Inbox

Filter [?] ID

ID	Name

All Agreements

Reports

Help Center

Creating New Agreement

Agreement Upload

1

2

3

Continue **2**

Submit **4**

Finish **3**

Exit Save

1. From My Inbox, click the **Create Agreement** button.
2. Complete the pages. To move to the next page, click **Continue**. Use left navigator to jump to specific page.
3. On the last page, click **Finish**.
4. On the left, click **Submit**.
5. Click **OK** to accept the statement and submit the agreement.