August 28, 2026

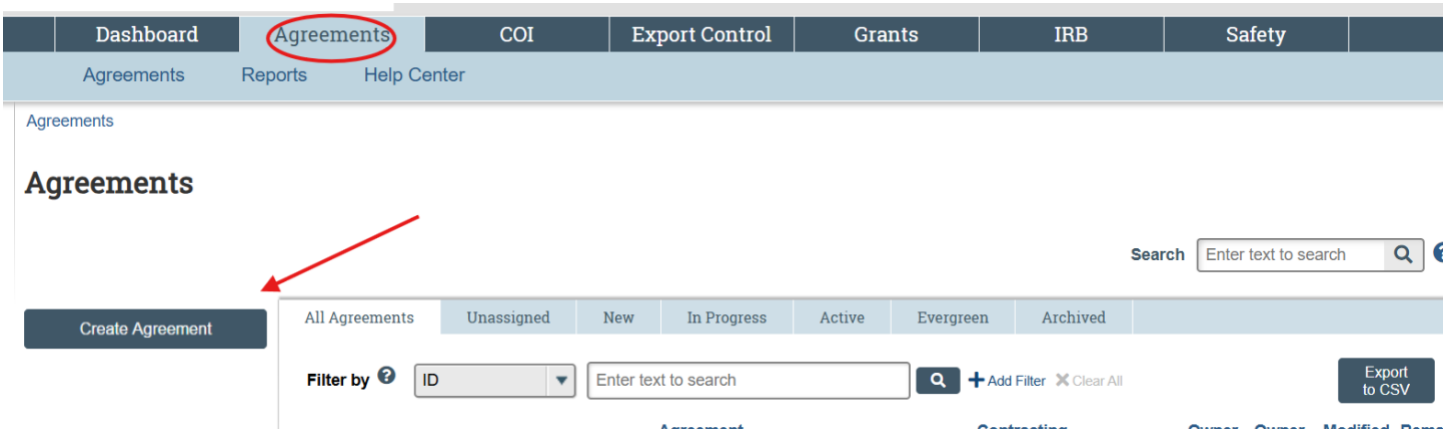
How to Initiate a Research-Related Agreement in HGA

UTC User Guide

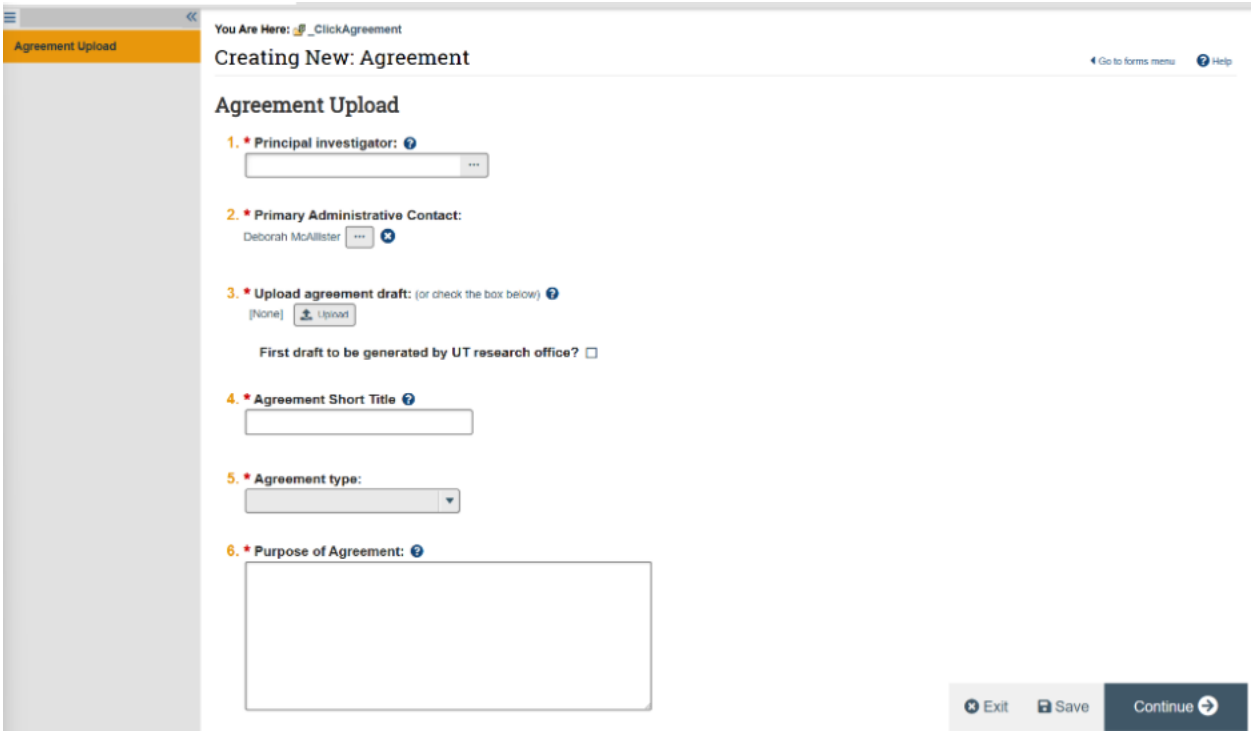
1. From the DASH Landing Page, select the Research module. From there, select the Grants & Agreements tile



2. Once you have accessed Grants & Agreements, select the Agreements tab from the top of the screen and click the Create Agreement button found on the left-hand side of the screen



3. For any agreement type you wish to initiate, you'll need to first complete the "Agreement Upload" smart form. Note that all fields with an asterisk are required fields.



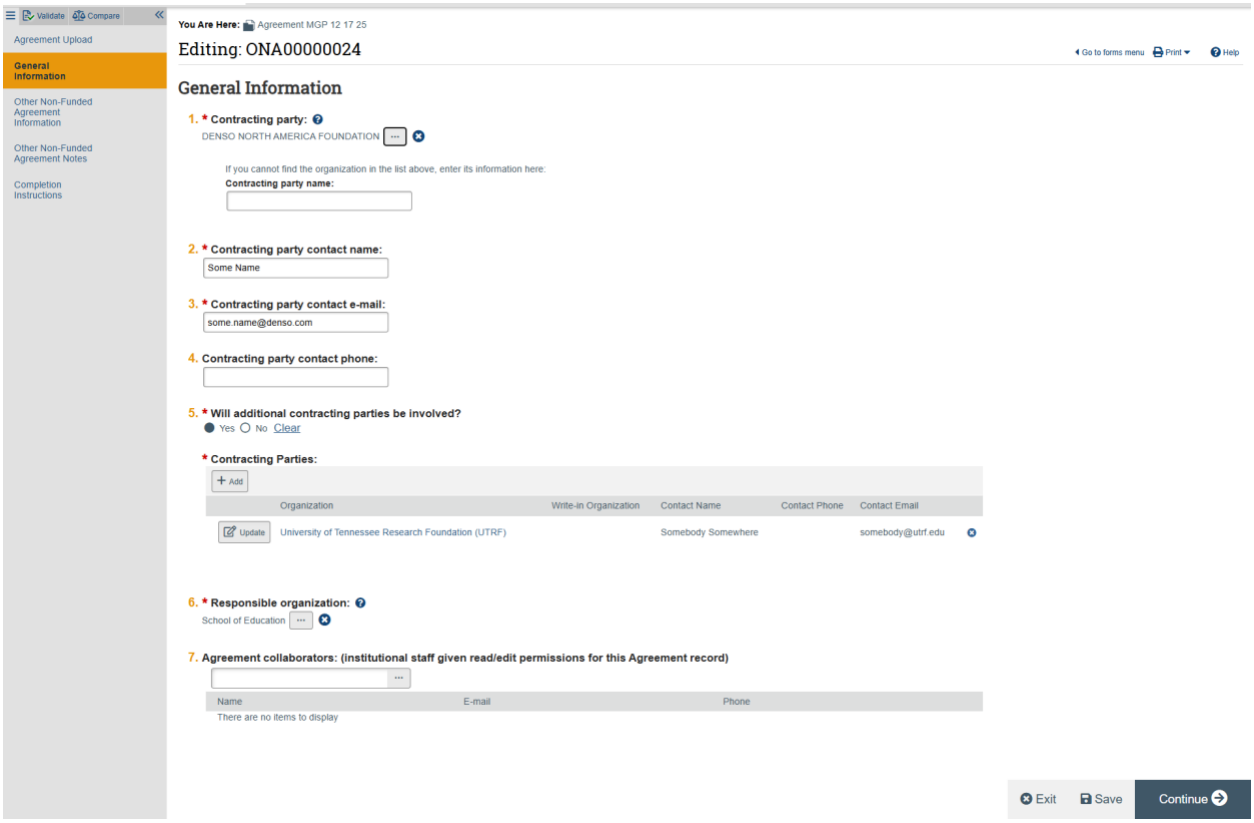
Field	Description
1*	Enter the name of the PI by typing in the field and selecting from the options or clicking on the ellipsis and searching for the individual.
2*	The Primary Administrative Contact will default to whoever initiated the "Create Agreement" action. You can change it if needed by clicking on the ellipsis and searching for the individual.
3*	Use the Upload button to upload an agreement draft. OR, if a UT campus central office user will generate the agreement, select the checkbox at the end of the question "First draft to be generated…." Note that a document uploaded into this field shows up in the Agreement workspace; however, it does NOT show up under the Documents tab in the Agreements workspace.
4*	Add a short title for the Agreement following this naming convention: PI Last Name – Type of Agreement (NDA, DUA, etc) – Other party – Date. It should look like this: Morelock – NDA – City of Chatt – 10.30.26 ***Note:** This field is limited to 50 characters.
5*	Select the type of agreement from the drop-down list. To learn more about each Agreement type, select one and then hover the cursor over your selection to see a definition. Options include the following: ○ Clinical Trial (CTA) ○ Non-Disclosure (NDA) ○ Award Negotiation Record (ANR) ○ Data Use Agreement (DUA) ○ Material Transfer Agreement (MTA) ○ Other Non-Funded Agreement (ONA) ○ Outgoing Subaward (SUB)

6*	Provide a short description of the engagement. Sponsored Programs staff will negotiate the agreement based on the information provided. Please explain the intended outcome of the agreement.
7	Add any supporting documentation that may be helpful. A document added here will show up under the Documents tab on the Agreements workspace for this record.

Click Continue in the lower right corner to move to the next screen. Note that additional screens will be generated based on the Agreement Type selected in Q5. If you find that you have selected the incorrect Agreement Type, you'll have to also complete the General Information screen before you can go back and change it.

General Information Screen

The General Information screen is also the same for every Agreement type.



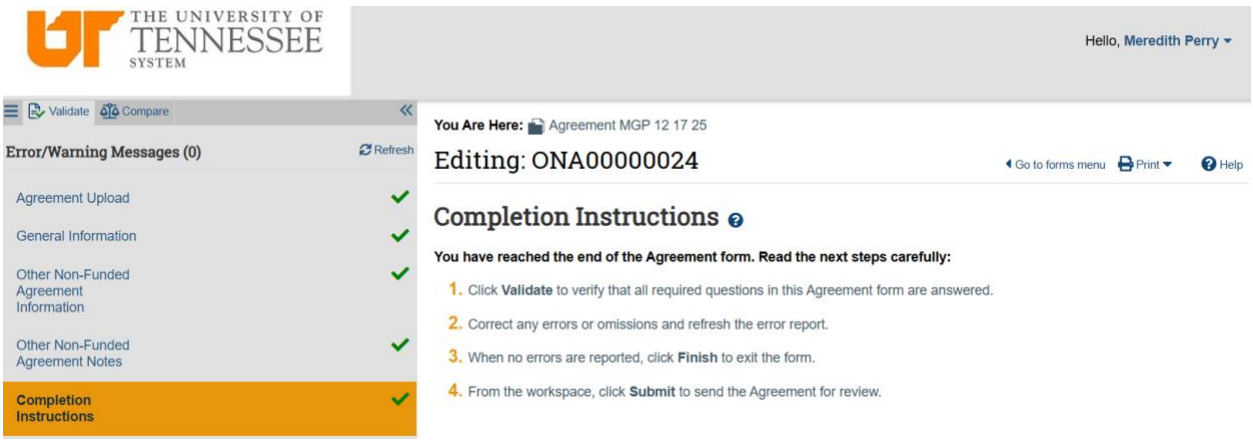
Field	Description
1*	Select the "contracting party" – the other party in the agreement – by beginning to type the other party's name in the field and selecting from the choices or by using the ellipsis to search for the contracting party. If you can't find the contracting party's name in the list, type it into the field here as indicated.
2*	Enter the name of the primary contact person at the contracting party.
3*	Enter the email of the contact person at the contracting party.
4	Enter the phone number of the contact person at the contracting party. This is not a required field.

5	If no additional contracting parties are involved, select no. If other contracting parties are involved, including UTRF, select yes. If you select yes, a required field will open for you to add additional contracting parties. Click the Add button and complete the pop-up screen with information about the additional party(ies) – Organization, Contact Name, Contact Phone, and Contact Email. In the lower right corner of the pop-up, select "OK" if there is only 1 additional party or select "OK and Add Another" if you need to add more parties. 5. * **Will additional contracting parties be involved?** ● Yes ○ No Clear * **Contracting Parties:** + Add Organization | Write-in Organization | Contact Name | Contact Phone | Contact E There are no items to display
6*	The "Responsible organization" is the department or unit that will administer the contract. This will be auto-filled based on the admin unit of the PI; however, you can change if needed.
7	Add any other personnel who should have read or edit permissions for this Agreement record. Add individuals by typing their name into the field and making a selection or click on the ellipsis to search. *Important Note – Departmental staff and other personnel will not automatically have access to agreement records based on their roles; users who need access must be explicitly given permissions to access the document here or via the "Manage Access" activity. For Agreement records that are created from a proposal or award, even individuals who have edit/read access rights on the original proposal or award will not automatically have rights to an agreement generated from those records in the agreement module. Access to each record must be explicitly given.*

Click Continue in the lower right corner to move to the next screen. The remaining screens will vary depending on the type of agreement you indicated was needed. Complete these screens to the best of your ability.

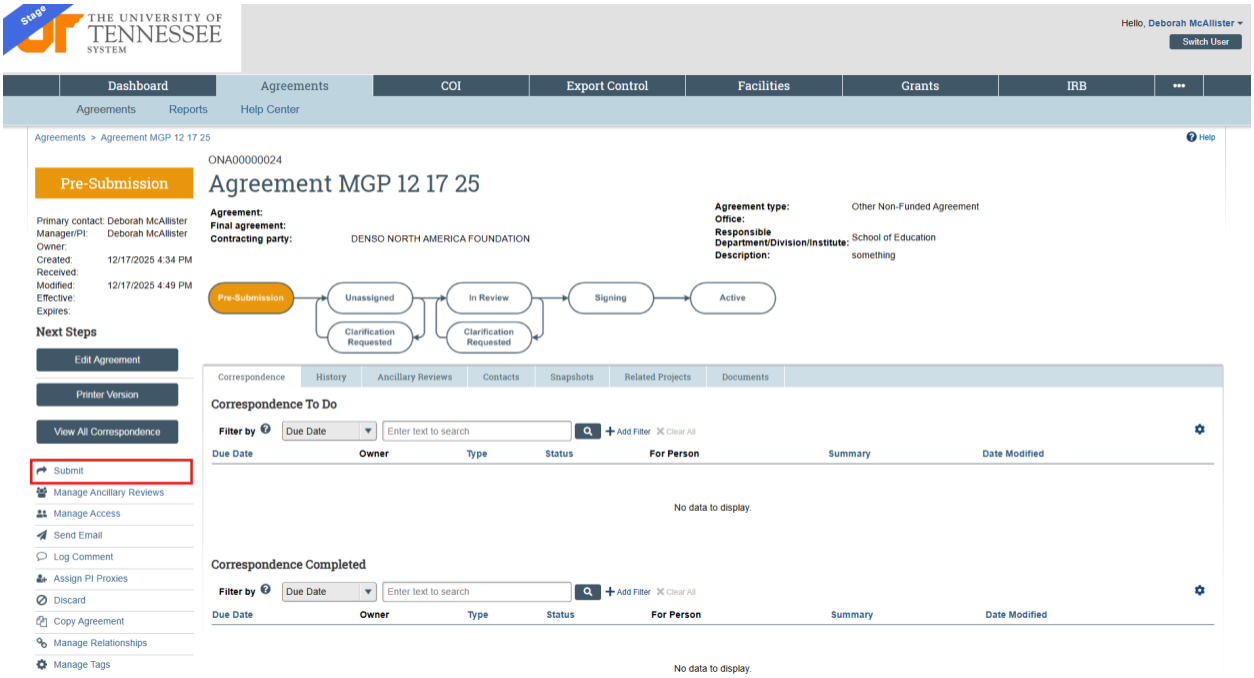
Completion Instructions

On the final page, select "Validate" in the upper left corner (just under the UT logo) to identify and address any errors or warnings.



When ready, select “Finish” in the lower right corner to exit the smart forms.

The next step will be to submit your information to ORSP staff. You will do so by selecting the “Submit” activity



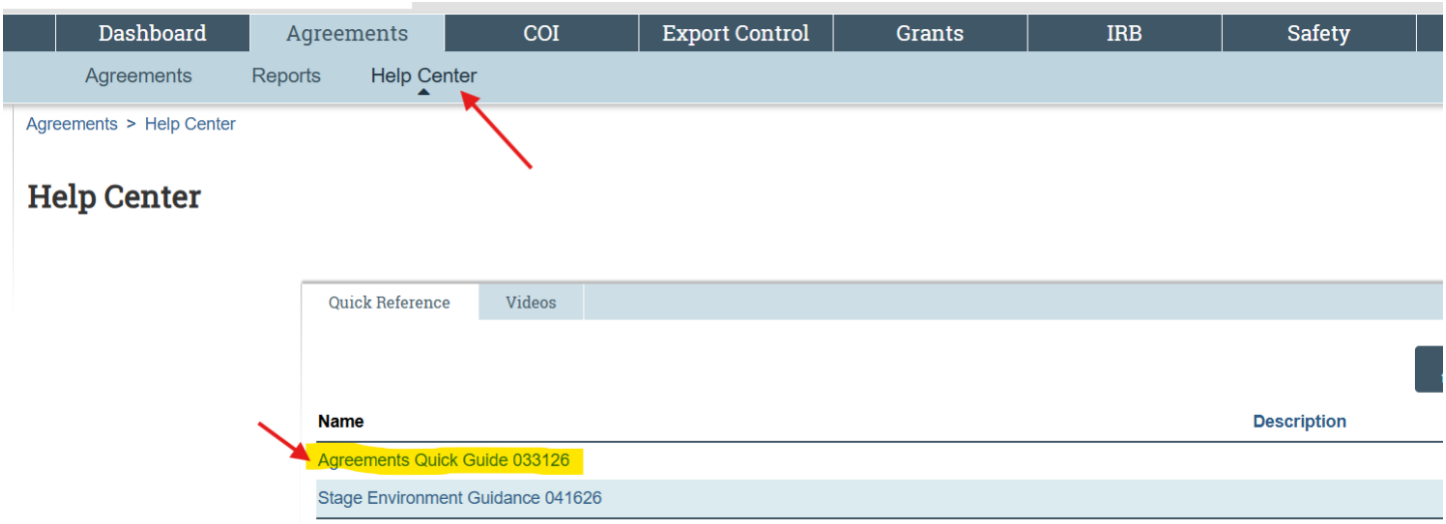
Click OK on the pop-up screen. Note that the Agreement record has now changed status to “Unassigned” and the “Submit” activity is no longer available.

Note that even after submitting the Agreement record, the PI can continue to edit the agreement and any post-submission changes made will show up for central office users. Once the Agreement Record has been assigned to a central office user, it can no longer be edited by the PI or other editors. Assignments will be made by central office staff. Only the Agreement Owner can edit the Agreement Record from the “Assigned” state.

Note that the status is listed as “Unassigned” because the record has not yet been assigned an owner. **Only central office staff can complete the “Assign Office” or “Assign Owner” activities.**

At this point, ORSP staff will review what you have submitted and contact you about next steps.

If you need more detailed instructions about completing specific screens, please refer to the Agreements Quick Guide, which can be found in the Help Center tab of the Agreements module:


Dashboard
Agreements
COI
Export Control
Grants
IRB
Safety
Agreements
Reports
Help Center
Agreements > Help Center
Help Center
Quick Reference
Videos
Name
Description
Agreements Quick Guide 033126
Stage Environment Guidance 041626