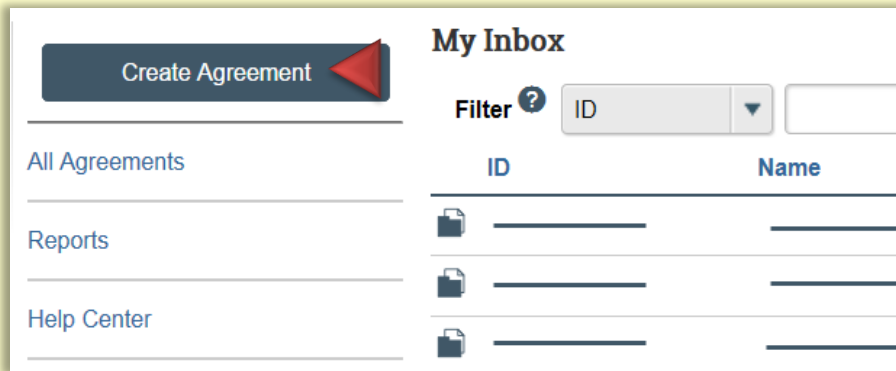





**eAgreements
Clinical Trial Subcontract (CTS)
Submission Guide**

Create the Agreement

From My Inbox, click the **Create Agreement** button.



The screenshot shows a user interface for 'My Inbox'. On the left, there is a vertical navigation menu with three items: 'All Agreements', 'Reports', and 'Help Center'. At the top of this menu is a dark button labeled 'Create Agreement' with a red triangle pointing to the right. To the right of the menu is the main content area titled 'My Inbox'. It features a 'Filter' dropdown menu currently set to 'ID', followed by an empty search input field. Below the filter is a table with two columns: 'ID' and 'Name'. The table contains three rows, each with a document icon, a horizontal line representing an ID, and another horizontal line representing a name.

	ID	Name
	_____	_____
	_____	_____
	_____	_____

Agreement Upload

Complete the **Agreement Upload** page and click **Continue**.

Agreement Upload

* 1.0 Principal Investigator:

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

* 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: ?

6.0 Supporting documents:

+ Add

Name

There are no items to display

7.0 Description:

1.0 Type or select the Principal Investigator name.

2.0 Automatically populates with the logged on user. This user can submit the agreement on behalf of the PI.

3.0 If the sponsor provided a draft agreement, upload it here. Otherwise, select the checkbox.

Select the question mark icon for specific help text.

4.0 Provide a name for the agreement.

Select the question mark icon for specific help text.

5.0 Select the **Clinical Trial Subcontract** option.

Select the question mark icon for specific help text.

6.0 (Optional) Attach any supporting documents.

7.0 (Optional) Add descriptive information, as needed.

General Information

Complete the **General Information** page and click **Continue**.

General Information

*** 1.0 Select an organization:**

NOTE - If you cannot find the organization in the list, select "Other."

Other

* If you cannot find the organization in the list above, enter its information here:

Contracting Party Name:

*** 1.1 Contracting party contact name: ?**

*** 1.2 Contracting party contact e-mail:**

*** 1.3 Contracting party contact phone:**

2.0 Add additional Contracting Parties:

Organization	Contracting Party Name	Contact Name	Contact Email	Contact Phone
There are no items to display				

3.0 Select any related projects:

Name	ID	Project State	Owner
There are no items to display			

4.0 Agreement team members: ?

Name	E-mail	Phone
There are no items to display		

1.0 Type or select the name of the contracting party. Select "Other" if the organization is not listed and type its name. The wildcard symbol (%) can be used when typing the name or searching the list.

1.1 – 1.3 Provide the contracting party's contact name, email, and phone number.

Select the question mark icon for specific help text.

2.0 Add any additional contracting parties.

3.0 (Optional) Select any related agreements that are in the system.

4.0 Add individuals at UT Southwestern who require access to the agreement. The logged on user will automatically be added to this list.

Select the question mark icon for specific help text.

Clinical Trial Subcontract Information (continued on Page 6)

Complete the **Clinical Trial Subcontract Information** page and click **Finish**.

Clinical Trial Subcontract Information

* **1.0 Upload Prime Agreement:**

There are no items to display

* **2.0 Industry Sponsor** (*NOTE - If you cannot find the organization in the list, select "Other"*):

* **3.0 Velos ID (e.g. 12345):**

NOTE - If you cannot find the protocol in the list, select "TBD."

* **4.0 IRB Protocol Number (e.g. STU 201612-001):**

5.0 Does the study involve any of the following -

1. Cancer patients or their caregivers or relatives
2. Cancer prevention
3. Assessing cancer epidemiologic, imaging or biological markers for early detection or risk stratification ?

Yes No [Clear](#)

6.0 Sponsor Protocol Number:

1.0 Select **Add** to attach the prime agreement.

2.0 Type or select the Industry Sponsor.

3.0 Select the Velos ID.

4.0 The IRB Protocol Number automatically populates upon selection of the Velos ID.

5.0 Indicate whether the study is cancer-related.

Select the question mark icon for specific help text.

6.0 The Sponsor Protocol Number automatically populates upon selection of the Velos ID.

Clinical Trial Subcontract Information (continued on Page 7)

Complete the **Clinical Trial Subcontract Information** page and click **Finish**.

* 7.0 Chart of Accounts Information:

Fund Type	Source	Department	Project ID	Activity
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There are no items to display

* 8.0 OPA Award Number (e.g. OPA0001234):

* 9.0 Upload Subcontract Budget:

[None]

10.0 Subcontract Budget Information:

* 10a. Direct Cost:

10b. Indirect Cost (if applicable):

* 10c. Total Cost:

* 11.0 Amount to be Encumbered:

7.0 Select **Add** to designate the chart(s) of account associated with this subcontract.

8.0 The OPA Award Number automatically populates upon selection of the Velos ID.

9.0 Select **Upload** to attach the subcontract budget.

10.0 Provide information regarding the subcontract budget.

11.0 Provide the dollar amount to be encumbered.

Select the question mark icon for specific help text.

Clinical Trial Subcontract Information (continued from Pages 5 and 6)

Complete the **Clinical Trial Subcontract Information** page and click **Finish**.

* **12.0 Subcontractor Type:**

- Domestic
 - Foreign Individual
 - Foreign Organization
- [Clear](#)

* **12.1 Upload Subcontractor [W9](#):**

[None]

* **13.0 Subcontractor Principal Investigator Name:**

* **14.0 Is this an amendment to an existing agreement in Velos?**

- Yes No [Clear](#)

12.0 Select the subcontractor type.

Depending on the selection, upload of the subcontractor W9, W-8BEN, or W-8EXP is required.

13.0 Provide the name of the subcontractor Principal Investigator

14.0 Indicate whether the current submission is an amendment to an existing agreement in Velos.

After clicking **Finish**, the Agreement Workspace will appear.

Submit the Agreement


From the Agreement Workspace, click the **Submit** button on the left side of the screen.


Next Steps


[Redacted]

[Redacted]

[Redacted]

 Submit

 _____

 _____