

Triage of Agreements

Unmodified Template Agreements

Background and Purpose

Use of unmodified versions of UW Templates and Task Orders to Master Agreements greatly reduces the amount of negotiation needed to get an agreement in place.

Unfortunately, it has not been possible to identify these agreements in RAMP to take advantage of the speed this approach provides.

With the implementation of new Tags and Reports, Research and Sponsored Programs (RSP) is now able to quickly see a worklist of these unmodified templates to enable us to quickly triage the worklist and tackle these quick wins.

Plan

The campus community and RSP will work together to tag these template agreements in RAMP (Campus before the records come to RSP; RSP when assigning worklists).

Once assigned, RSP staff will set aside a fraction of their day (an hour or two) to review their updated worklist and move forward with these template agreements.

Introductory Guidance

1. “Unmodified” means only situations where the demographic (PI Name, Sponsor Name, dates, dollar amounts, payment terms, SOW, Budget, Addresses) have been changed. If a sponsor makes other changes to the agreement template, it should NOT be flagged as “Unmodified.”
2. The “Unmodified” tags should not be used in situations where the sponsor has not yet received and approved a copy of the UW Template Agreement or the completed Task Order Template. In these instances, the agreement is generally not ready to “sign and send” as the sponsor may come back with changes or, potentially, refuse to use the UW template entirely.
3. A list of current UW Template Agreements can be found at: <https://rsp.wisc.edu/forms/> under “Agreement Forms” or, for School/College specific templates, on the RSP SharePoint ([Agreement Templates](#)).
4. RSP will use best efforts to conduct a rapid turnaround of these templates. However, to do so, all information must be completed in the RAMP SmartForms and, where additional information or approvals are needed, such as Outgoing

Material Transfer Agreements with third-party material or incomplete SmartForms, extra time may be required.

- a. With Outgoing Material Transfer Agreements in particular, if the material incorporates third-party material (or is owned by the third-party outright), please include a PDF copy of the third-party's consent when submitting to RSP.

Process

1. If a campus member (PI, unit, or division) creates a RAMP Agreement record that uses either an Unmodified (other than demographic data) UW Template, or an Unmodified (other than demographic data) Master Agreement Task Order Template, the campus member will click "Manage Tags" on the left-hand menu of the RAMP Agreement Record and select the appropriate Tag from the following:
 - a. Unmodified UW Template
 - b. Unmodified Master Agreement Task Order Template

When submitting, campus should endeavor to attach a copy of the agreement that has been signed by the sponsor already. This will help expedite overall processing. Additionally, for Task Orders under a Master Agreement, campus should link to the existing Master Agreement Record using "Manage Relationships" in the RAMP record (preferred), or upload a copy of the original, signed Master Agreement as a "Supporting Document" in RAMP.

2. Upon submission of the record to RSP, the RSP Staff Member assigning the record to a negotiator will review the tags and the agreement to confirm that it is an unmodified version of either a UW template agreement or Master Agreement Task Order. If an agreement is NOT tagged but it is one of the foregoing, the RSP Staff Member assigning the record will tag the agreement as appropriate.
3. A least once per day, the RSP negotiator will review their worklists (**Dashboard>In Process>My "Unmodified UW Template" Agreements** and (**Dashboard>In Process>My "Unmodified Master Agreement Task Order Template"**) and, within 24 hours, act on any records in this list that have not yet been acted upon. Other than agreements with foreign entities (which require additional reviews per UW policy), and assuming these are unmodified, action will include obtaining UW signature, obtaining sponsor signature (if not already signed), and finalizing the agreement and record. **For agreements with foreign**

entities, RSP will still review these within 24 hours, though it may require review and approval from Export Control (or higher), depending on the sponsor.

4. To initiate signature:
 - a. The RSP negotiator will send the agreement to the appropriate RSP signatory via DocuSign (with a CC to the campus contact), indicating in the DocuSign email that it is a template agreement.
 - b. The appropriate signatory will do a quick review to confirm it is a template agreement and, upon confirmation, will sign.
 - i. RSP signatories will work to sign template agreements within two (2) business days of receiving from the negotiator to sign (unless needed earlier due to a deadline).
 - c. Upon receipt, the campus contact (CC'd on the DocuSign and receiving the signed version) will return the signed copy to the sponsor. The negotiator, in turn, will update the RAMP record as appropriate.
5. If the RSP negotiator identifies that the record is NOT an unmodified template or task order, the negotiator will let campus and the manager know (by email) what is different in the agreement, will remove the associated tag, and will process the agreement in the normal course of events.

It is acknowledged that some of this process will involve an element of judgement. Questions regarding the process, or uncertainty on whether something is a template, should be directed to any of the contracts managers at RSP.