

• Do NOT submit until all approvals have been obtained!

## What types of Ancillary Reviews do I need?

### SOM Approval Matrix

Agreement [Non-Funded]	Principal Investigator (PI Certification AR)	Department Chair / Delegate* (Department/School Review AR)	School Admin / SOMOGC (Department/School Review AR)
Confidentiality Agreement	X		X
Consortium Agreement	X	X	X
Data Use Agreement	X		X
Intellectual Property Management Plan	X	X	X
Licensing Agreement	X		X
Master Agreement	X		X
Material Transfer Agreement (MTA)	X		X
Multi-Purpose Agreement	X	X	X
Other Agreement	X	X	X
Physical Asset Loan Agreement	X		X
Teaming Agreement	X	X	X
Agreement [Outgoing Subaward]	X	X	X
Agreement [Internally Funded Outgoing Subaward]	X	X	X

## How do I add Ancillary Reviews in the Agreements Module?

After creating the agreement and supplying the required information on the SmartForm:

### 1 Go to Manage Ancillary Reviews.

### 2 Once in the Ancillary Review form, click Add.

### Add Ancillary Review

#### 1. \* Select either an organization or a person as reviewer:

Organization:

Person:

#### 2. Review type:

#### 3. \* Is a response required?

Yes  No [Clear](#)

#### 4. Comments:

#### 5. Supporting documents:

Name

There are no items to display

\* Required

3 In section 1, choose the name of the PI from the **Person**: drop down menu. You can start typing, using first name or last name to search.

4 In section 2, choose **PI Certification** from the dropdown menu.

5 In section 3, click **Yes**, because a response is required.

6 In section 4 - Comments, please give a brief explanation of what is being requested that includes what type of non-funded agreement is being executed. For example:

**\*Dr. XXX, please approve this Material Transfer Agreement for your work on project XXX with XXX (sponsor name). OSP requires PI approval before assigning agreements for processing.\***

7 In section 6, you do not need to add any additional documents here. All documents should be uploaded in the Agreements Module already.

8 Click **OK** if you are only adding PI certification. If you need to add Department Certification and/or SOMOGC Certification, please click **OK and Add Another**.













- **For Department Review (if applicable—see chart)**, you will need to repeat steps 3-8. You will need choose your **departmental approver** as the Person and **Department/School Review** in the dropdown menu for Review Type.

- **For FINAL STEP – SOM Review**, you will need to add an Ancillary Review for an Authorized SOM official. See the list of those Authorized Officials in the **Department Research Administrator Tips** section on page 2 of this guide. Repeat steps 1-8. Choose **Department/School Review** in the dropdown menu.

**Important:** Once all required ancillary reviews have been submitted, send an email to [SOMOGC@uvahealth.org](mailto:SOMOGC@uvahealth.org) to get in the queue for SOM review and approval. Once approved by SOMOGC, the Grant Administrator will submit the agreement to OSP.

## PI Tips

Do NOT select *Submit* when submitting an ancillary review. Once a review has been assigned to you, the *Submit Ancillary Review* button will appear on the left side of the agreement screen (see below).

 Submit 
 Manage Ancillary Reviews
 Manage Access
 Submit Ancillary Review 
 Email Agreement
 Log Correspondence
 Discard
 Copy Agreement
 Generate Agreement
 Manage Relationships

## Department Research Administrator Tips

Make sure that all required ancillary reviews are accepted/completed before submitting a non-funded agreement to OSP for processing. If an agreement is submitted before these approvals are received, OSP Front Desk will withdraw the agreement back to *Pre-Submission* until they are completed. [SOMOGC Department Assignments](#)

<b>SOM Authorized Officials</b>	
<b>Name</b>	<b>SOM Department</b>
<b>Lauren Armstrong</b>	Anesthesiology Beirne Carter Immunology Center Cancer Center Cardiovascular Research Center (CVRC) Cell Biology Family Medicine Internal Medicine (Allergy) Internal Medicine (Cardiology) Internal Medicine (Hematology/Oncology) Internal Medicine (Infectious Diseases) Internal Medicine (Pulmonary) Pathology Pediatrics Pharmacology Urology
<b>Annie Caldwell</b>	Center for Cell Membrane and Cell Physiology Center for Research in Reproduction Internal Medicine (Endocrinology) Internal Medicine (Gastroenterology) Internal Medicine (General Medicine/Hospital Medicine) Internal Medicine (Nephrology) Molecular Physiology Ophthalmology and Center for Advanced Vision Science Radiation/Oncology Radiology
<b>Heather Clark</b>	Biomedical Engineering Biomedical Ethics Comparative Medicine Dean's Office Dentistry Dermatology Health Sciences Library Neurology Neuroscience Orthopedics Otolaryngology Telehealth/Telemedicine iTHRIV
<b>Susan Hennigan</b>	Biochemistry Center for Public Health Genomics Plastic Surgery Public Health Sciences
<b>Debbie Krenitsky</b>	Center for Cell Signaling Center for Diabetes Technology Emergency Medicine Microbiology Neurosurgery Obstetrics and Gynecology Physical Medicine and Rehab Psychiatric Medicine Surgery