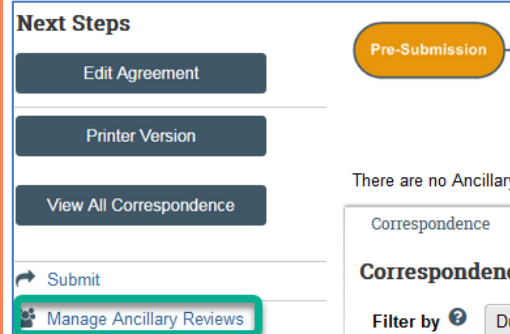


## Adding Agreements Ancillary Reviews Quick Guide

Click on the "Manage Ancillary Reviews" link in the left navigation bar.



The Manage Ancillary Reviews window opens. Follow these steps:

**1. Identify each organization or person:** Press Add.

**2. Review type:** Select a review type.

**3. Is a response required?** Select Yes, unless this ancillary review is an FYI.

**4. Send notification now?** If the Agreement is in the Pre-Submission state, this question appears. Select Yes to send the notification to the ancillary reviewer now. Select No to send it when the Agreement is submitted to ORPA.

**5. Comments:** These comments appear in the email to the Ancillary Reviewer. Sign your name so the reviewer knows who is requesting the review. These comments also appear on the agreements workspace, but are overwritten by the reviewer's comments when they submit their review. These comments do not appear on the History tab.

**6. Supporting Documents:** Drag + drop any attachments for the reviewer here. These attachments will always appear on the History tab.

**7. Supporting documents:** Upload all attachments the reviewer needs to complete their review. These attachments appear on the agreements workspace + are overwritten by any files uploaded when the reviewer submits their review. These attachments are not included in the email to the reviewer + do not appear on the History tab.

**8. Click OK.**

**9. Include the review type + comments for the ancillary reviewer here. These comments will always appear on the History tab.**

**10. Drag + drop any attachments for the reviewer here. These attachments will always appear on the History tab.**

**11. Click OK to add the ancillary review.**

Please see the chart on the second page of this quick guide for specific reviewers, comments, and attachments that should be included in the ancillary review request depending on the scenario.

Clicking OK in #11 adds the ancillary review and, if the agreement is in the Unassigned state or later, sends the email to the reviewer immediately. If the agreement is in the pre-submission state, and "send notification now" is yes, the email is sent when OK in #11 is clicked; otherwise the email is sent when the agreement is submitted to ORPA. The email is sent to the person specified in #1 or the people associated with the "organization" in #1. The email will come from [erasupport@princeton.edu](mailto:erasupport@princeton.edu) (not from your email address).

- Only the comments in #6 are included in the email.
- No attachments are included in the email.
- The comments in #9 + the attachments in #10 will always appear on the History tab.
- The comments in #6 + the files in #7 will initially appear on the Agreements workspace (which makes it easy for the reviewer to see everything they need in one place to complete their review) but will be overwritten by any comments + files uploaded by the reviewer while completing their review. If the reviewer does not include any comments or files in their review, any comments and docs on the Agreements workspace will be blanked out for this review.

### How do you know when the ancillary reviewer has completed their Agreements ancillary review?

The Admin Contact and the Agreement Owner receive email when an ancillary review is complete. All ancillary reviews + their "Accepted" status are listed in the Ancillary Reviews section of the Agreements workspace.

Ancillary Reviews						
Review Type	Organization	Person	Reqd	Accepted	Comments	Docs
Ad Hoc Review		Kyle Burkhardt	yes		Please review for (ABC) reason. Thanks, Stacey	add-AR-file1.pdf add-AR-file2.pdf
Ad Hoc Review		Zachary Davis	yes	yes	Looks good to me.	Submit-AR-attachment.pdf

### Are ancillary reviewers automatically reminded to complete their Agreements ancillary review?

The system does not send reminders.

Need help? Email [erasupport@princeton.edu](mailto:erasupport@princeton.edu)

Last updated: 8/25/22

Review Type	Review Details + Requirements
Ad Hoc	Varies
Assurances	<p><b>INFO:</b> Only needs to be completed if this is a non-funded agreement or is a funded agreement and the answers to the compliance questions have changed.</p> <p><b>PERSON OR ORGANIZATION:</b> Select your name, not the name of the PI. This is because PI Assurances cannot be electronically signed in the agreements module; the paper based method must be used.</p> <p><b>AR COMMENTS:</b> Include the name of the PI or senior/key person who needs to sign the assurance.</p> <p><b>AR ATTACHMENTS:</b> Do not upload the signed assurance here. The signed assurance statement will be uploaded during the "Submit Ancillary Review" activity.</p> <p><b>If multiple assurances are needed for Senior/Key Personnel, add a separate assurance ancillary review for each person by clicking "OK and Add Another" in Step 7.</b></p>
Chief Information Security Officer (OIT Security)	<p><b>PERSON OR ORGANIZATION:</b> Select Organization "OIT-Information Security Ofc".</p> <p><b>AR ATTACHMENTS:</b> Upload the SOW and the document with the clause that needs to be reviewed.</p>
Compliance Review (RIA)	<p><b>PERSON OR ORGANIZATION:</b> Select Organization "RIA-IACUC", "RIA-IRB", "RIA-IBC", or "RIA-FCOI" as appropriate.</p>
Export Controls	<p><b>PERSON OR ORGANIZATION:</b> Select Organization "ORPA-Export Controls".</p>
Office of Technology Licensing Review	<p><b>PERSON OR ORGANIZATION:</b> Select person.</p>
Office of General Counsel Review	<p><b>PERSON OR ORGANIZATION:</b> Select person.</p>
PI Eligibility (select "Ad Hoc")	<p><b>INFO:</b> Select type "Ad Hoc Review" when PI status is needed for a researcher. Refer to the "PI Status Requests" tile on <a href="#">the URB website</a> for guidance.</p> <p><b>PERSON OR ORGANIZATION:</b> Select Organization "DFR-Ofc Dean for Research"</p>
Risk Management Review	<p><b>PERSON OR ORGANIZATION:</b> Select person.</p>
University Research Board	<p><b>PERSON OR ORGANIZATION:</b> Select Organization "ORPA-URB".</p>