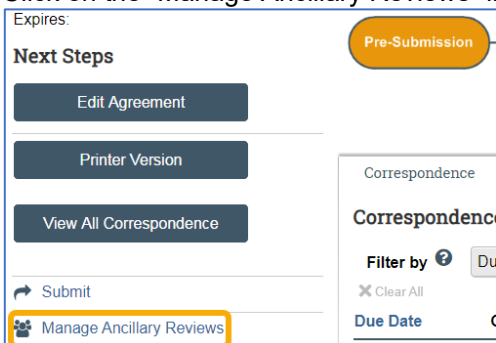


ADDING ANCILLARY REVIEWS QUICK GUIDE: AGREEMENTS

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



The Manage Ancillary Reviews window opens. Follow these steps:

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 (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 appear on the History tab.
- The comments in #6 + the files in #7 appear on the Ancillary Reviews tab on the Agreements workspace

HOW DO YOU KNOW WHEN THE ANCILLARY REVIEWER HAS COMPLETED THEIR AGREEMENTS ANCILLARY REVIEW?

The Primary Contact receives email when an ancillary review is complete. All ancillary reviews + their "Accepted" and "Completed" status are listed in the Ancillary Reviews tab on the Agreements workspace.

Correspondence	History	Ancillary Reviews	Contacts	Snapshots	Related Projects	...					
Ancillary Reviews											
Review Type	Person	Organization	Required	Requestor Comments	Requestor Documents	Accepted	Completed	Reviewer Comments	Reviewer Documents	Date Review Created	Date Review Submitted
Ad Hoc Review	Rita Hamilton (testpi5)		yes	Please review for XYZ reason. Tanks, Stacey	Add Attachment 1.pdf		no			10/2/2024	
Ad Hoc Review	Kyle Burkhardt		yes	Please review for (ABC) reason. Thanks, Stacey	Add AR attachments.pdf add-another-AR-file.pdf	yes	yes	Looks good to me.	Submit AR.pdf	10/2/2024	10/2/2024

ARE ANCILLARY REVIEWERS AUTOMATICALLY REMINDED TO COMPLETE THEIR AGREEMENTS ANCILLARY REVIEW?

The system does not send reminders.

Need help? Email erasupport@princeton.edu

Review Type	Review Details + Requirements
Ad Hoc	Varies
Assurances	<p>INFO: 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>PERSON OR ORGANIZATION: Name of person who needs to assure. If using the “PDF based” method, select your name.</p> <p>AR COMMENTS:</p> <ul style="list-style-type: none"> • Lead PI or Senior/Key Personnel electronic method: State that the senior/key person should complete their assurance in the “Add AR Comment” box. • Lead PI or Senior/Key Personnel “PDF based” method: include name of PI and senior/key personnel in the “Manage AR Comment” box comment. <p>AR ATTACHMENTS: Do not upload any attachments for the electronic or PDF based methods. Even if you already have the signed PDF assurance statement, do not upload the signed assurance here. The signed assurance statement will be uploaded during the “Submit Ancillary Review” activity.</p> <p>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.</p>
Chief Information Security Officer (OIT Security)	<p>PERSON OR ORGANIZATION: Select Organization “OIT-Information Security Ofc”.</p> <p>AR ATTACHMENTS: Upload the SOW and the document with the clause that needs to be reviewed.</p>
Compliance Review (RIA)	<p>PERSON OR ORGANIZATION: Select Organization “RIA-IACUC”, “RIA-IRB”, “RIA-IBC”, or “RIA-FCOI” as appropriate.</p>
Export Controls	<p>PERSON OR ORGANIZATION: Select Organization “ORPA-Export Controls”.</p>
Office of Technology Licensing Review	<p>PERSON OR ORGANIZATION: Select person.</p>
Office of General Counsel Review	<p>PERSON OR ORGANIZATION: Select person.</p>
PI Eligibility (select “Ad Hoc”)	<p>INFO: Select type “Ad Hoc Review” when PI status is needed for a researcher. Refer to the “PI Status Requests” tile on the URB website for guidance.</p> <p>PERSON OR ORGANIZATION: Select Organization “DFR-Ofc Dean for Research”</p>
Risk Management Review	<p>PERSON OR ORGANIZATION: Select person.</p>
University Research Board	<p>PERSON OR ORGANIZATION: Select Organization “ORPA-URB”.</p>