

ERMS-AGREEMENTS: EMAIL NOTIFICATIONS OVERVIEW

Emails are one of the many ways the Enterprise Research Management System (ERMS) works to keep you informed about your various projects. The ERMS-Agreements module (ERMS-A) will provide specific notifications relevant to that module.

ERMS-A emails will:

- Be sent from “noreply-erms@uthscsa.edu,”
- Include the PI’s name,
- Indicate the Agreement ID that links back to the ERMS-Agreements dashboard,
- Be labeled “INFORMATION ONLY” or “ACTION REQUIRED,”
- Identify the Owner, or OSP Agreements Specialist, assigned to your agreement, and
- Include a brief explanation of the area being addressed.

Please note emails labeled “ACTION REQUIRED” in the subject line are vital to the timely processing of your Agreement. Failure to act on those emails can lead to delays in the execution of the agreement and the start of any associated projects. Below you will find a list of the various emails generated by ERMS-Agreements, with a brief description of each.

Guidance on how to manage your Outlook inbox to filter only those emails you wish to receive can be found [here](#).

Please contact the OSP Agreements Team with questions or concerns at contracts@uthscsa.edu.

ERMS-Agreements EMAIL TYPES

ACTION REQUIRED Messages:

Subject line: [AgreementID]: **ACTION REQUIRED: Approval of Ancillary Review Needed**

Purpose: Notification that the recipient needs to review and approve some aspect of the agreement, such as the budget, or department chair approval of the agreement request. *This process replaces COP signatures, so timely response is imperative.* We cannot proceed with signatures on an agreement or set up a Project ID for a project if the Ancillary Review is not completed.

Subject line: [AgreementID]: **ACTION REQUIRED: Clarification has been Requested; Your Response is Needed to Proceed**

Purpose: This email is vital. It tells the PI/dept that the review process has been halted pending necessary information from them. It is only used if OSP cannot proceed without the requested info. The email will be sent to the PI and the Primary Contact. If the status of an Agreement is in Clarification Requested status, OSP cannot continue to process the agreement.

Subject line: [AgreementID]: **ACTION REQUIRED: Reminder: Please Provide the Clarification Requested; Action on your Agreement is delayed until response provided**

Purpose: This reminder email is sent to the PI and Primary Contact every seven days, as long as there is an outstanding Clarification Request (see above) pending.

INFORMATION ONLY Messages:

Subject line: [AgreementID]: **INFORMATION ONLY: Owner (OSP Specialist) Assigned**

Purpose: This email is sent to the PI to indicate who the specific specialist assigned by OSP will be. This name also appears in the upper left hand information block on the specific Agreement Workspace.

Subject line: [AgreementID]: **INFORMATION ONLY: Agreement Language has been Finalized; Signatures Pending**

Purpose: This email informs the PI that the Agreement language has been finalized, and is moving forward into the signature process. Once signatures begin, the status bar on the Agreement Workspace will show whether internal, external, or both signatures are occurring.

Subject line: [AgreementID]: **INFORMATION ONLY: Agreement Approved**

Purpose: This email is sent to the PI and Primary Contact letting them know that the Agreement has been signed, but not Activated.

Subject line: [AgreementID]: **INFORMATION ONLY: Agreement Activated**

Purpose: This email is a notice to the PI that this Agreement is now fully executed and Active. The agreement record will now show an Active status in ERMSA, and an Amendment Request can be submitted at any time as needed.

Subject line: [AgreementID]: **INFORMATION ONLY: This Agreement is Expiring Soon**

Purpose: This email is sent when the agreement is 90, 60, and 30 days from expiration. It allows the Investigator ample time to request an extension or amendment to their Agreement as well as time to ensure all expenses are appropriately charged to the account.

Subject line: [AgreementID]: **INFORMATION ONLY: Agreement has Expired**

Purpose: This email is sent to the PI to inform them that the referenced Agreement has expired.