

**Creating a Stand-Alone PT Agreement Record**

Updated 6.10.19

Definitions:

**PT Agreement Record:** An agreement that is separate from a proposal record. A PT Agreement record can be linked to an existing proposal record, if related.

**Proposal Type**: The field in the PT summary screen that is used to define the type of agreement being tracked with this record. PT Agreement types are listed below:

Confidential Disclosure Agreement

Educational Partnership Agreement

Equipment Use Agreement

Facility Use Agreement

Fiscal Agent Service

In-Kind Grant Agreement

License Agreement

Master Clinical Trial Agreement

Materials Transfer Agreement

Memorandum of Agreement

Memorandum of Understanding

Research Collaboration/Cooperative R&D Agreement

Visiting Scientist Agreement

How to create a new PT Record:

1. Navigate to the Proposal Development module and click on “Management Record”



1. Choose “New Proposal” > Click Continue
2. Fill in the sponsor name > Click Continue
3. A PT record will populate. Navigate to the Summary Screen of the PT record and change the proposal type to the type of agreement in which this record will represent.



1. Fill out all other appropriate data fields and tabs. Track the agreement in the agreements tab of the record. NOTE: See Agreement Tracking training document
2. If the agreement can later be linked to a proposal record, utilize the Linkages tab.

NOTE: See Linkages and Related Proposals training document