This document is intended for the Central offices (Owners).

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Submit to Reviewer(s)

Once an Agreement is ready for initial review, the state of that agreement moves from Pre-Submission to **Owner Review**. Upon completion of your review, you can submit the agreement for further review. When this is done the state of the project moves from Owner Review to **Under Review**.

**Submit to Reviewer(s)**

To submit the agreement for internal review (if applicable):

1. **Under My Current Actions** click **Submit to Reviewers**.
2. Click **Add** to include all appropriate Reviewers.
3. Type the desired name into the search field and **double-click** the name when it appears in the dropdown.
4. Click **OK**.
5. Once all desired Reviewers have been added, include your notes and click **OK**.
6. The state of the agreement will now move to **Under Review**.
Submit to Reviewers (for Re-Review)

If a previously identified reviewer has already submitted their review AND you require that they re-review the agreement, you MUST remove them from the list and re-add them. This will clear the date they submitted their previous review and allow for the re-review. Only the ones who need to re-review should be removed. All other reviewers should remain.

Submit for Re-Review

To submit for re-review, (if applicable):

1. Under My Current Actions, click Submit to Reviewers.
2. Under the Assigned Reviewers list, choose the reviewer you would like to remove by clicking the Delete tab.
3. Failure to remove a reviewer will result in an error message and will not allow you to proceed until this step is properly completed.
4. Click Add to add the desired reviewer.
5. Type the reviewer’s name into the search field and double-click the name when it appears in the dropdown.
6. Click OK.
7. Once the reviewer has been re-added, include your notes and click OK.
8. The state will move from Owner Review to Under Review.
Move to External Review

Once the internal review process is complete, you may elect to route the agreement to External Review.

This indicates that the agreement has been submitted externally (typically to the sponsor) for further review and possible negotiation.

1. Under My Current Actions click Move to External Review.
2. From the “Select what is pending” drop down menu, choose the option that best fits.
3. Ensure all other fields are entered correctly and click OK.
4. The Agreement will now move to External Review.

While under External Review, the owner has the ability to execute the following activities:

- Move to Awaiting Response
- Request Agreement Team Changes
- Log Correspondence
**Owners - Agreements Quick Reference**

**Move to Awaiting Response**

You will execute this activity if the agreement has been returned by the sponsor for further review.

1. Under My Current Actions click **Move to Awaiting Response**.

2. From the “Select what is pending” drop down menu, choose the option that best fits.

3. Ensure all other fields are entered correctly and click **OK**.

4. The state of the agreement will now move to **External Review: Awaiting Internal Response**.

**Request Agreement Team Changes**

Execution of this activity moves the agreement back to the Author/Agreement team for further revisions.

5. Under My Current Actions click **Request Agreement Team Changes**

6. Describe the changes you are requesting and click **OK**.

7. The state of the agreement will now move to **Office Review: Pending Changes by Author**.
Execution of this activity allows you to log all external correspondence between you (the owner) and the sponsor.

1. Under My Current Actions, click Log Correspondence. You must record the following information:

2. **A Summary** of the correspondence.

3. **Date** of Correspondence

4. **Correspondence Type** (call in/out, email, WebEx, fax, voice message, no answer, other).

5. Click **OK**.
Complete Review

Once all reviews are complete, you can execute **Complete Review**.

**Complete Review**

Execution of this activity indicates that the agreement has completed the review process.

1. Under **My Current Actions** click **Complete Review**.
2. Under the **Final Determination** dropdown menu, indicate whether the agreement is **Complete** or has been **Executed**.
3. Click **OK**.
4. The state of the agreement will change to reflect the final determination chosen, ie: **Completed** or **Executed**.

**Convert Agreement to PDF**

To create a read-only PDF version of the agreement:

5. Under My Current Actions, click **Convert to PDF**.
6. Choose all documents you would like watermarked and click **OK**.
7. From the Agreements Workspace, click on the Agreements Information tab. Under Document Information, click the **PDF Document** link.