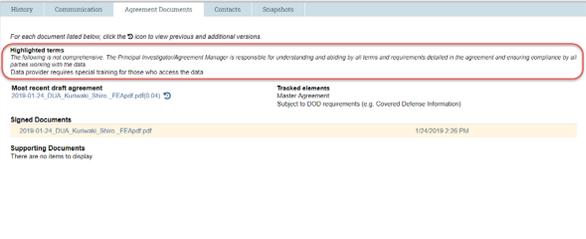
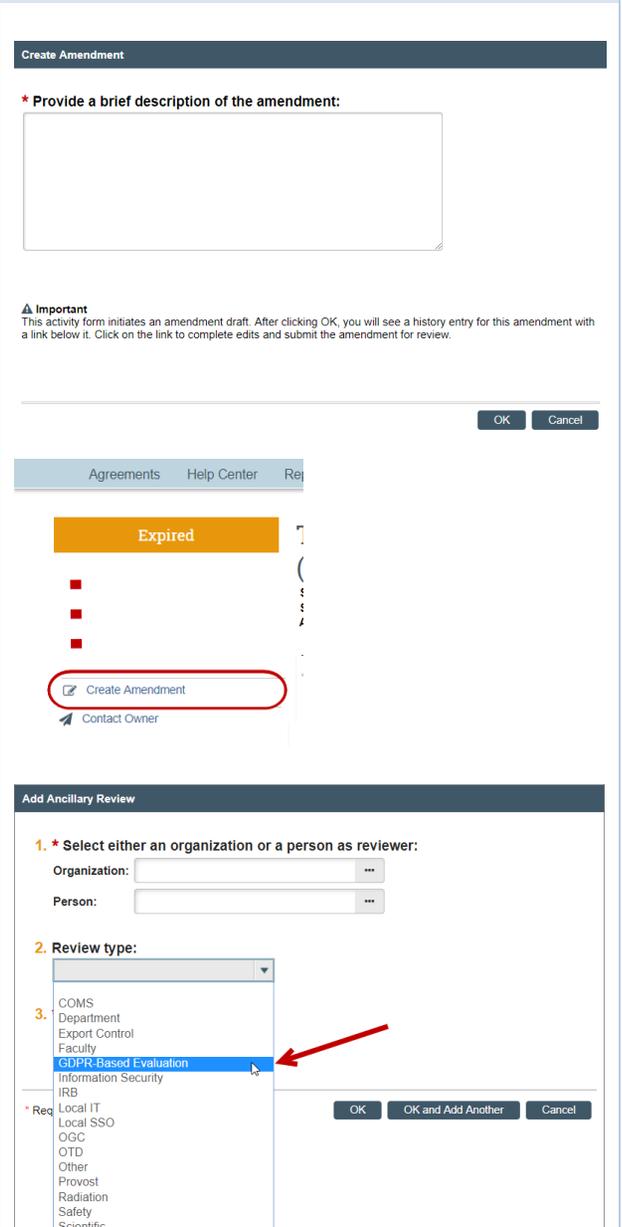


Agreements 1.24.1 Upgrade & Configuration Release Items: September 2019

This release includes the following minor Harvard updates.

What has changed...	What it means...	How it looks (as applicable)...
SmartForm Pages		
Agreement Information		
<ol style="list-style-type: none"> Person selectors no longer include inactive users The study team can now be updated through an amendment 	<ol style="list-style-type: none"> When selecting users for the Principal Investigator/Agreement manager, Agreement submission creator, and Harvard team members who need access to this Agreement, only individuals with an active HarvardKey/HUID will be available to select. Study team changes made through an amendment will now be reflected on the agreement once the amendment becomes active. 	
Workspaces		
Agreement		
<ol style="list-style-type: none"> To allow for more text-space, the Agreement Highlighted Terms have been moved on the Documents tab 	<ol style="list-style-type: none"> The Agreement Highlighted Terms will appear above the Most Recent Draft Agreement instead of next to the draft. 	 <p>The screenshot shows the 'Agreement Documents' tab in a software interface. At the top, there are navigation tabs: History, Communication, Agreement Documents (selected), Contracts, and Snapshots. Below the tabs, a message states: 'For each document listed below, click the icon to view previous and additional versions'. A red box highlights the 'Highlighted terms' section, which contains a warning: 'The following is not comprehensive: The Principal Investigator/Agreement Manager is responsible for understanding and abiding by all terms and requirements detailed in the agreement and ensuring compliance by all parties working with the data. Data provider requires special training for those who access the data.' Below this, there are sections for 'Most recent draft agreement' (with a download icon), 'Tracked elements' (listing Master Agreement and Subject to DOD requirements), 'Signed Documents' (with a document icon and date/time), and 'Supporting Documents' (stating there are no items to display).</p>

What has changed...	What it means...	How it looks (as applicable)...
<p>Activities</p> <p>Create Amendment</p> <ol style="list-style-type: none"> Language on the Create Amendment activity has been clarified Allow for amendment on expired agreement (to change or extend the previously active agreement) <p>Manage Ancillary Reviews</p> <ol style="list-style-type: none"> Allow for recording a GDPR-Based ancillary review on a submission. 	<ol style="list-style-type: none"> Three changes to the activity: <ol style="list-style-type: none"> The Comments input box on the Create Amendment box has been updated to better reflect the nature of the required input. The document attachment space is hidden, to ensure revised documents are included in the correct spaces of the Amendment SmartForm. The activity form now also includes important information about next steps to complete the amendment. It is now possible to change or extend an agreement even after it has expired. GDPR-based evaluation is now a review type selection option when assigning ancillary review and can be recorded on a submission/displayed in reports. 	 <p>The image shows two screenshots from a software interface. The top screenshot is titled 'Create Amendment' and contains a text input field for a description, an 'Important' note, and 'OK' and 'Cancel' buttons. The bottom screenshot is titled 'Add Ancillary Review' and shows a form with dropdown menus for 'Organization' and 'Person', a 'Review type' dropdown menu with 'GDPR-Based Evaluation' selected (indicated by a red arrow), and 'OK', 'OK and Add Another', and 'Cancel' buttons.</p>

What has changed...	What it means...	How it looks (as applicable)...
<p>Track Agreement Elements</p> <p>4. Agreement Tracking Elements includes new options: Master Agreement and None</p> <p>5. Highlighted Terms includes new option: None</p>	<p>4. Improved tracking to ensure items on the activity are not missed. Also, address tracking gap for master agreements.</p> <p>5. Improved tracking to ensure items on the activity are not missed.</p>	
<p>Notifications</p>		
<p>1. Pre-submission reminders will only be sent 5, 10, and 15 days after the initial submission creation</p>	<p>1. Pre-submission reminders will be less frequent. The first reminder will be delayed to allow for drafting time, and will not be sent unless the agreement is not submitted within 5 days of creation.</p>	

What has changed...	What it means...	How it looks (as applicable)...
<p>2. Agreement expiration reminder now includes the correct expiration date</p> <p>3. Links for SPH and HMS have been updated in the agreement expiration reminder and agreement expired emails and on the general notice footer</p>	<p>2. The expiration reminder will include the relevant agreement expiration date in the text of the email.</p> <p>3. The notifications have been updated to include the correct links for SPH and HMS.</p>	<p>Title: Heterogeneous Causal Effects: Drug Exposure & Safety (YODA-Janssen)</p> <p>Description: This agreement will expire on 5/15/2020.</p> <p>Prior to the expiry date, click the link above to see the details and to create an amendment (to extend the agreement), if appropriate.</p> <p>If terms of the agreement indicated additional requirements at closure (such as destruction of data with a certificate, or results sharing), please visit the appropriate site for suggested next steps:</p> <ul style="list-style-type: none"> ▪ Harvard T.H. Chan School of Public Health Sponsored Programs Administration(SPA) ▪ Harvard Medical and Dental Schools Office of Research Administration(ORA) ▪ University Area, all other Harvard schools Office for Sponsored Programs(OSP) <hr/> <p>Harvard T.H. Chan School of Public Health Sponsored Programs</p>