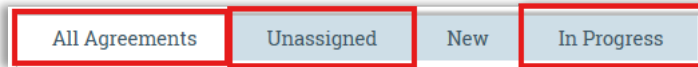


AGREEMENTS:

ENHANCEMENTS

1. A new “Submitted Date” column has been added to the All **Agreements**, **Unassigned**, and **In Progress** project listing tabs (second to last column) to display the most recent submission date and time of any agreement or amendment.



A table snippet showing the "Submitted Date" column highlighted with a red box. The table has columns: "Responsible Department ID", "Submitted Date", and "Modified Date".

Responsible Department ID	Submitted Date	Modified Date
140002	3/24/2026 9:13 AM	3/24/2026 9:44 AM

The agreement records in the Unassigned tab are now sorted by Submitted Date, showing records with the oldest submissions appearing at the top.

2. A new “Contracting Party Category” column has been added to all of the project listing views.

A screenshot of a project listing table with a red border around the top tabs and the "Contracting Party Category" column. The table has columns: "ID", "Name", "Agreement", "Agreement Type", "PI (First)", "PI (Last)", "Contracting Party", "Contracting Party Category", and "State".

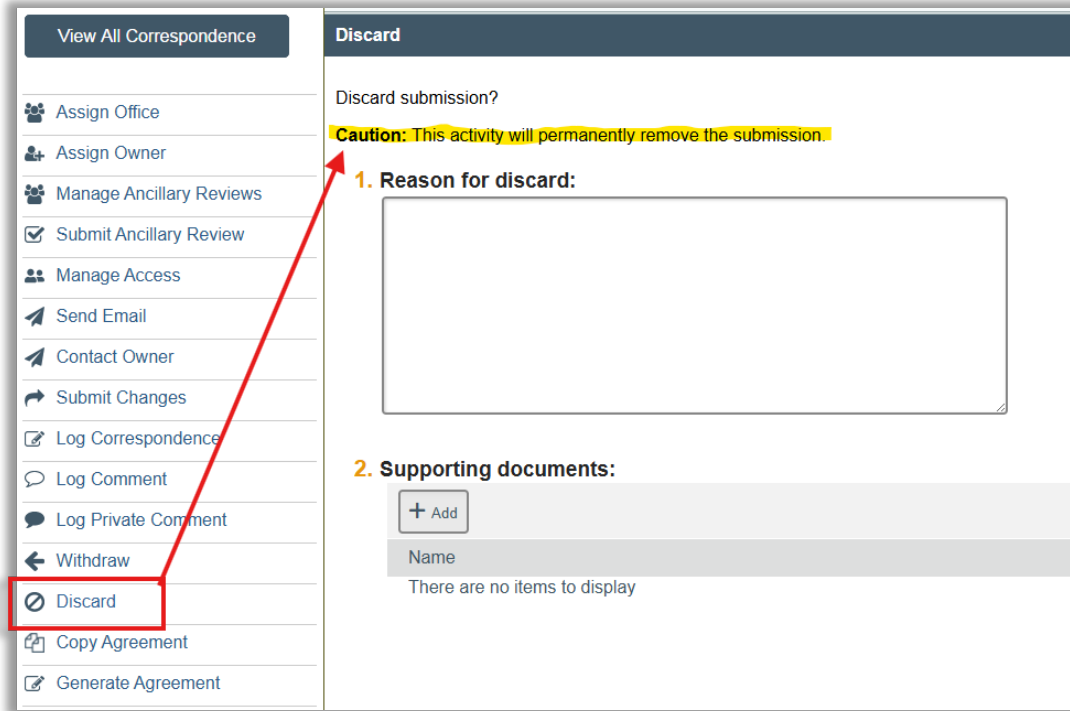
ID	Name	Agreement	Agreement Type	PI (First)	PI (Last)	Contracting Party	Contracting Party Category	State
R000003539	ROPER_NIH_103897_University of Virginia		Outgoing Subawards	Michael	Roper	University of Virginia	Institute of Higher Education	Unassigned

3. Expiration date and the Agreement ID are now added to **Expiration Reminder** and the **Agreement Expired** notifications in the email body.
4. The Discard activity screen now includes two new optional fields:
 - Reason for Discard
 - Supporting Documents

User roles that can perform this activity:

- PI
- Primary Contact
- Agreement Owner

NOTE: The submission cannot be re-activated, but it may be copied.



- 5. Email notifications now include both the individual reviewer and all ancillary reviewers configured for the organization in the 'To' line.
- 6. Now the Manage Ancillary Review activity is available in all states of an Agreement and an Amendment.

To add additional users to NDAs, use the "Send Email" activity to notify the central office of the individual to be added. An ancillary review will be assigned to the user to acknowledge the NDA terms and add them to the agreement.

- 7. Agreement Reviewer and Agreement Manager roles can now withdraw an Agreement. When the agreement is withdrawn, it transitions back to the Pre-Submission state.

NOTE: Only users with the PI, PI Proxy, Creator, Reviewer, or Manager roles are permitted to execute the Withdraw activity.

- 8. When the direction of transfer is **Sending**, now the MTA "Identify the institution that developed the material" field shows all active organizations as options for selection regardless of company category.

