

AFFILIATION AGREEMENT REVIEW PROCESS

At the outset of a relationship with a site, the Clinical or Field Coordinator should confirm whether there is an existing agreement with that site on file or not.

For more info regarding affiliation agreements, see <http://uwm.edu/risk-management/affiliations/>

NEW AGREEMENT

If no existing agreement, the Coordinator sends UWM's Uniform Agreement to the site.

- If the site accepts the Uniform Agreement, the Coordinator should send it to the Risk Manager for signature, noting any alterations to the standard form before it is signed.
- If the site insists on using its own agreement, proceed to the next step.

EXISTING/RENEWAL AGREEMENT

If there is an existing agreement, alert the site, and use that agreement to manage the relationship.

- If the agreement needs to be renewed, send the agreement to the site to confirm if updates are needed.
- If updates are needed, review them against the checklist.
 - If no issues, send to Risk Management for signature.
 - If issues, proceed to next step.

Coordinator reviews the agreement using the checklist, revises the agreement as appropriate (use Track Changes, if possible), and notes any questions/concerns in the comments.

Coordinator sends agreement with Track Changes and checklist to Risk Management at riskmgt@uwm.edu with a note regarding any applicable deadlines (highlighting the matter if it is urgent). Agreements not reviewed by the Coordinator will be returned for review or a meeting arranged to discuss revisions that need to be made.

PLEASE NOTE THAT RISK MANAGEMENT AND THE OFFICE OF LEGAL AFFAIRS REQUIRE ONE MONTH LEAD TIME ON AFFILIATION AGREEMENTS - A SHORTER REVIEW PERIOD CANNOT BE GUARANTEED.

Risk Management and the Office of Legal Affairs will work together to address any questions/concerns regarding the agreement.

If the agreement is approved without modification, it will be signed and returned to the Coordinator.

If changes are necessary, the agreement will be returned to the Coordinator in redline format with comments as to the rationale for the changes. This redline with comments should be returned to the clinical site for review. If it is accepted, then it can be signed by all parties. If there are further revisions or questions, these should be directed to Risk Management or the Office of Legal Affairs, as applicable.

Coordinator obtains fully executed AA with signature of Facility and sends electronic copy to Risk Management.