MediTract Usage Procedure

The following procedure outlines appropriate use of the MediTract Database. This document further supplements the User Guides provided by MediTract. Any questions related to this document should be directed to Stephanie Arcuri in the Office of Legal Affairs at ext. 26886.

I. Uploading a New or Renewal Document

A. Responsibilities of the Lead Responsible Person

The Lead Responsible Person is responsible for uploading pre-printed form contracts into the MediTract Database upon final signature by all parties. All other contracts which have been signed by all parties should be sent to the Office of Legal Affairs for uploading into the MediTract Database. There are two exceptions to this rule. First, Template Purchase Orders are not uploaded into the MediTract Database. Second, Research Agreements are not uploaded into the MediTract Database because they are uploaded into the Rush Research Portal.

B. How to Upload a New Document

1. Click on the "Add Documents" tab on the left hand side of the Contract Library Page of the MediTract Database.
2. Select the "New Contract" link.
3. Complete the required Standard Cover Page Fields.
    - The name of the Lead Responsible Person should be entered in the "Primary Responsible Party" field.
    - If the Lead Responsible Person is not an administrator, the appropriate administrator's name should be entered in the "Secondary Responsible Party" field.
    - The appropriate attorney's name should be entered in either the "Secondary Responsible Party" or "Third Responsible Party" field.
    - The appropriate compliance attorney's name should be entered in either the "Third Responsible Party" or the "Fourth Responsible Party" field.
    - The "Third Responsible Party" field is under the Optional field and the "Fourth Responsible Party" field is under the Custom Field.
    - The "Fourth Responsible Party" email address will need to be added to the CEMAIL list found under the Contracts/Attachments tab of the contract summary sheet.
4. Click the "Browse" button to upload the appropriate document.

5. Include relevant information in the Optional Field. (Note: The Compliance Questions Field is not required.)
6. Add attachments to the bottom of the "Add Documents" page.
   - Attachments may include documents such as an accompanying Business Associate Agreement, a relevant pricing guide or an addendum to the agreement.
   - Exhibits and attachments which are incorporated into the agreement should be uploaded as part of the agreement as a whole.
7. Click the "Submit" button.

* Once the agreement is uploaded into MediTract, it will take 24-48 hours before it becomes accessible.
* The Lead Responsible Person should maintain the original executed hard copy of the agreement for ten (10) years from the date of termination.
* The Lead Responsible Person should submit the Arrangements/Contract Approval Form to the Office of Legal Affairs after uploading the agreement.

C. How to Upload a Renewal Document

1. Click on the "Add Documents" tab on the left hand side of the Contract Library Page of the MediTract Database.
2. Select the "Replacement Contract" link.
3. Insert the appropriate contract number of the Agreement which will be replaced.
4. Click the "Browse" button to browse for the appropriate replacement Agreement.
5. Click the "Submit" button.

* The Agreement replaced by the renewal agreement will automatically become an attachment of the renewal agreement.
* Renewal Contracts must be added as such and should not be added as a New Contract.

II. Archiving Documents

A. Locate the expired document in MediTract.
B. Click the "Archive" tab in the upper right hand corner of the contract summary sheet.
C. Select twelve (12) months from the drop-down list requesting the amount of time to archive the document.
D. Click the "Archive" button.

III. Using the Contract Collaborator (Optional)

A. Click on the “Add Documents” tab on the left hand side of the Contract Collaborator page of the MediTract Database.
B. Select the location of the Agreement.
C. Complete the Organization Profile and Document Specifics.
D. Click “Browse” to browse for the appropriate document.
E. Click “Save.”
F. Click “Reviewers List” in the new window and enter the designated reviewers and click “Save.”
G. Click “Submit Document.”

* Use of the Contract Collaborator Database is optional.
* Once an Agreement is finalized and uploaded into the Contract Library, it must be deleted from the Contract Collaborator.

IV. Miscellaneous

A. Only pre-approved Unmodified Templates executed after July 1, 2008 should be uploaded into the MediTract Database.
B. The date of the Agreement must not be changed on the cover sheet. Changing the date of the Agreement on the cover sheet will impact the expiration notice emails.
C. The Vendor Directory is accessible to all users. The Vendor Directory should not be edited.

V. Definitions

A. Lead Responsible Person: The person responsible for negotiation of a contract.
B. Template Purchase Order: RUMC’s approved purchase order template.
C. Research Agreements: Clinical Trial and Clinical Study Agreements, Material Transfer Agreements, research related Confidentiality Agreements, Data Use Agreements and IRB Agreements that are included in the Rush Research Portal.