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Subagreements and Subamendments

Subagreement and subamendment drafts are requested in GMAS at the Department/School level, and then moved through the workflow by the Central Office. Requesting drafts in GMAS clarifies what information the Central Offices need to complete a draft and allows for tracking of a draft throughout its life cycle. Throughout this document subagreement and subamendments may be referred to simply as drafts.

Prerequisites

This job aid assumes that the reader understands the basic functionality and terminology of GMAS.

Additional resources

- [University wide GMAS Subagreement Business Process](#)
- [Step-by-step Walkthrough of GMAS Subagreement Workflow](#)
- [Notifications Preferences Job Aid](#)
- [Documents Repository Job Aids](#)
- [Sub Dashboard Job Aid](#)
- [All Subagreement related Job Aids](#)

Requesting a draft

From the GMAS segment homepage, select **Subrecipients** in the left navigation menu to go to the **Subrecipient list** screen.

To start drafts, select the **Actions** button at the top of the **Subrecipient list** screen, and then select **Request subagreement and subamendment drafts**. Any subrecipient that is sponsor approved or Active and does not already have a draft in process can be selected.

*Drafts can also be initiated from a subrecipients homepage by selecting **Draft subagreement** or **Draft subamendment**.*

Once initiated, drafts will display on the **Subrecipient list** screen in the **Subagreements and subamendments in process** section in **Under development** status. Selecting the **Type** link will navigate to the subagreement homepage where [Actions Required](#) can be completed, related documents can be uploaded, and the draft can be locked and routed for **Central review** and **Drafting**.

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Subagreement/Subamendment homepage overview

Subamendment 2 for 5120334
 Board of Trustees of the University of Illinois
 Robert Ackert

6 History (6) | Related links | Info | Remove from clarification | 7

1 Under development | Central review | **Clarifications requested** | Drafting | With subrecipient | Partially executed | Fully executed

2 **Primary status: Ready for drafting**
 Moved to Clarifications requested with Caroline Chui on Feb 11, 2023 by Micher Kaze
 Status update comment Please confirm if quarterly progress reports are due 30 days after the period.

3 Central reviewer Caroline Chui
 Drafter Unassigned
 Completion priority Normal 4

5 **Actions required**
 Other changes are missing Edit

Key information 8

- Exchange of human subjects data
- FFATA reporting
- Special reporting

1 does not apply: Show all

9 Open all | Close all | Add comment

10 **Comments** 0 comments

Subamendment attributes 6 attributes apply Edit +

General information Change of PI Edit +

Special terms 2 apply | 1 does not apply Edit +

Dates and dollars Jan 1, 2022 - Dec 31, 2023 | \$0 Edit +


Primary performance location Complete Edit +

FFATA statement of work summary Edit +

Subrecipient contacts Edit

Documents 2 documents 11 Upload Download all +

1. **Status bar:** Displays the workflow and shows the status of the draft in red.
2. **Status summary:** Displays who the draft is currently with, the date the status was updated, and who made the updates. Comments that were provided with the latest status transition will display here as “Status update comments”. If the draft is in a secondary status, the primary status will be listed in this section as well.

3. **Drafter and Central reviewer assignments:** Once assigned, the Central reviewer and Drafter will display. Assignments are set while the draft progresses but can also be updated by a Central Office representative by selecting the pencil icon.
 - a. **Tooltips:** Anywhere on the screen where a  (question mark symbol) appears can be hovered over to provide more context about that specific field/label.
4. **Completion Priority:** “Normal” is the default value. “High” can be selected by using the pencil icon. If set to “High”, the reason for the high priority must be entered.
5. **Actions Required:** Each action required must be completed to route the draft for **Central review**. Any information entered when creating the subrecipient record at proposal (or in other requests) will be pre-populated and can be updated. Once the required data is entered, the “**Action Required**” is no longer displayed, and the data is displayed in a panel on the Subagreement homepage.
6. **History/Related links/Info:**
 - **History** shows all status transitions and assignments made during the life of the draft.
 - **Related links** provides access to any related websites or emails related to the workflow.
 - **Info** provides in-application high level help related to the screen.
7. **Action buttons:** The primary action buttons move the draft forward through the workflow. From the secondary actions menu (the gear icon button), the draft can also be moved into a secondary status, delete, decline, roll back, and notifications can be turned on or off.
 - **Moving into a secondary status:** More information can be found in the [Secondary statuses](#) section of this document.
 - **Delete:** Draft may be deleted at any point from **Under development** until **Ready for drafting** (Department admins can only delete while in **Under development** status.)
 - **Decline:** Once the draft is moved to **Drafting** it can move to **Declined**. Draft should be rolled back to a prior status where delete isn’t available if deleting is more appropriate.
 - **Rollback:** Drafts can be rolled back to their prior status by the Central Office. Users can be selected to receive a notification regarding the rollback. The notification shows the new status of the subamendment as well as who selected to rollback.
 - **Turn notifications on:** Click to opt-in to notifications for all status changes and assignments for this specific subagreement. To opt-in to notifications at the portfolio level, click on your name in the red bar at the top of the screen, then select **Notifications preferences** in the drop down. For details go to the [Notifications Preferences job aid](#).
8. **Key information:** The key information section includes a list of flags that are relevant to the draft.
 - The **FFATA reporting** flag is set at the subrecipient level. If this flag is present with a green check it indicates that additional information (FFATA statement of work summary, and primary performance location address) must be provided for the OSP FFATA reporters, and that the sub will be reported on

each time a draft is fully executed for that subrecipient. If this flag is not marked correctly, only those on the [OSP^FFATA Editor – university wide team](#) are able to change it.

- The special reporting flags (**Special terms**, **Advanced payment**, and **Exchange of human subjects data**) that have been marked as “Yes” will display in this section with a green check.
9. **Comments:** Comments related to the draft that would be helpful for anyone involved in the workflow to note and are not specific to the status transitions can be left here.
 10. **Panels:** As data is entered from the list of actions required, panels will be added to the screen to display the responses. The panels will default open throughout the workflow up until full execution, and then they will default to closed.
 11. **Documents:** Document that are relevant to the draft should be uploaded in the document repository. Descriptions and categories can be applied to each document. For more information on categorizing sub documents go [here](#).

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Actions required

There are 7 action required items in a draft that is **Under development**. The grid below shows when the action required items appear. These items will disappear when all the required information is provided. Once all action required items disappear, the draft can be locked and routed for **Central review** and **Drafting**.

| Action required | Shows for subagreement | Shows for subamendment | Shows in subamendment if selected as an attribute |
|---|------------------------|------------------------|---|
| Subamendment attributes | | X | |
| Special terms | X | | X |
| Dates and dollars | X | | X |
| FFATA statement of work summary (only if FFATA reportable) | X | | X |
| Primary performance location | | | X |
| Subrecipient principal investigator | | | X |
| Other changes | | | X |

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Data entry and panels

Each of the action required items and panels have an **Edit** button that opens a window where the required information can be entered. In this section there will be a brief description of the panels and related data entry for the following:

- [Subamendment attributes](#)
- [Special terms](#)
- [Dates and dollars](#)
- [FFATA statement of work summary](#)
- [General information](#)
- [Previously issued](#)
- [Other changes](#)
- [Subrecipient contacts](#)
- [Primary performance location](#)

Subamendment attributes

Subamendment attributes are only available in a subamendment. This is the first action required that must be completed. This is where the attributes that are applicable to the subamendment can be selected. Only those items selected will appear on the screen.

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Special terms

Special terms must be identified at the subagreement level. This is where **Special reporting**, **Advanced Payment**, and **Exchange of human subjects data** can be identified as applicable or not for the draft.

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Dates and dollars

Dates and dollars to be issued are required in the subagreement and can be updated within a subamendment. Data will default into the anticipated dates and dollars in the subagreement from the segment revision (primary award set-up). If the primary award has not been finalized in a segment revision yet, no data will default. Budget periods can be set up the way that is best suited for how dates and dollars will be issued to the subrecipient.

In a subamendment, the dates and dollars will default from the prior fully executed subagreement or subamendment.

Note: Any subagreements that were completed prior to February 27, 2023 will default in as 1 budget period, but can be updated to multiple periods if desired in a subamendment.

The following are visible at the top of the **Dates and dollars** entry screen:

- **Sponsor approved Dates and Dollars:** Lists the dates and dollars identified as allowable by the sponsor in a segment revision (obligated bucket funds). If nothing is present, there has been nothing set aside in the segment revision for the subrecipient yet.
- **Sponsor anticipated Dates and Dollars:** Lists the dates and dollars identified as anticipated by the sponsor in a segment revision (anticipated bucket funds). If nothing is present, there has been nothing set aside in the segment revision for the subrecipient yet.
- **Previously Issued:** *Only displayed on a subamendment:* The issued start and end date and the sum of issued amounts from prior drafts.

For each budget period, ensure that the anticipated start and end dates reflect the total dates that will be issued to the subrecipient over the life of the award.

Issued dates and dollars for each budget period must be within the dates and dollars identified as anticipated for that period. The issued dates and dollars should total at the bottom to the new total obligated dates and dollars for the subrecipient as of full execution of the current draft.

- If the dates and dollars are **all in one budget period**, with each subamendment the end date would be increased, but the start date would remain the same and the issued amount will be updated to the new total issued amount (including from prior drafts).

In the example below, the draft is requesting the next year of funding (01/01/2022 – 12/31/2022) with an additional issued amount of \$3,195 with the budget set up as 1 period. This results in a change to the issued end date to extend through 12/31/2022 and updates the issued dollars to the new total issued amount of \$40,000 (the prior issued amount of \$36,805 + the new issued amount of \$3,195).

Edit dates and dollars



| | Dates | | Dollars | | | | | | |
|---------------------|----------------------------|----------------------|---------------------|-------------------|-----------------|----------------|--------------|---------------------|--|
| Sponsor approved | Jan 1, 2021 - Dec 31, 2022 | | \$36,805 | | | | | | |
| Sponsor anticipated | Jan 1, 2021 - Dec 31, 2023 | | \$88,214 | | | | | | |
| Previously issued | Jan 1, 2021 - Dec 31, 2021 | | \$36,805 | | | | | | |
| Number of periods | 1 | | | | | | | | |
| Period | Anticipated start date | Anticipated end date | Anticipated dollars | Issued start date | Issued end date | Issued dollars | Carryforward | Total issued amount | |
| 1 | 01/01/2021 | 12/31/2023 | \$88,214.00 | 01/01/2021 | 12/31/2022 | \$40,000.00 | | \$40,000 | |
| Total | Jan 1, 2021 | Dec 31, 2023 | \$88,214 | Jan 1, 2021 | Dec 31, 2022 | \$40,000 | \$0 | \$40,000 | |

Cancel Done

- If the dates and dollars are **broken out into separate periods**, with each subamendment the start and end dates for the next period can be entered and the amount to issue for the draft can be entered in the new

period.

In the example below, the draft is requesting the next year of funding (01/01/2022 – 12/31/2022) with an additional issued amount of \$3,195 with the budget set up as 3 periods. This results in the issued dates and issued dollars being entered in the budget period 2 row reflecting the new time and money being issued.

Edit dates and dollars ✕

| | Dates | | Dollars | |
|---------------------|----------------------------|--|----------|--|
| Sponsor approved | Jan 1, 2021- Dec 31, 2022 | | \$36,805 | |
| Sponsor anticipated | Jan 1, 2021- Dec 31, 2023 | | \$88,214 | |
| Previously issued | Jan 1, 2021 - Dec 31, 2021 | | \$36,805 | |

Number of periods

| Period | Anticipated start date | Anticipated end date | Anticipated dollars | Issued start date | Issued end date | Issued dollars | Carryforward | Total issued amount |
|--------------|------------------------|----------------------|---------------------|--------------------|---------------------|-----------------|--------------|---------------------|
| 1 | 01/01/2021 | 12/31/2021 | \$36,805.00 | 01/01/2021 | 12/31/2021 | \$36,805.00 | | \$36,805 |
| 2 | Jan 1, 2022 | 12/31/2022 | \$3,195.00 | 01/01/2022 | 12/31/2022 | \$3,195.00 | | \$3,195 |
| 3 | Jan 1, 2023 | 12/31/2023 | \$48,214.00 | MM/DD/YYYY | MM/DD/YYYY | | | \$0 |
| Total | Jan 1, 2021 | Dec 31, 2023 | \$88,214 | Jan 1, 2021 | Dec 31, 2022 | \$40,000 | \$0 | \$40,000 |

Both examples above result in the same period and same dollar amount being requested to issue.

Edit subamendment 05 dates and dollars

| | Dates | | Dollars | |
|---------------------|----------------------------|--|-----------|--|
| Sponsor approved | Apr 1, 2018- Mar 31, 2023 | | \$329,547 | |
| Sponsor anticipated | Apr 1, 2018- Mar 31, 2023 | | \$329,547 | |
| Previously issued | Apr 1, 2018 - Mar 31, 2023 | | \$329,547 | |

Number of periods

| Period | Anticipated start | Anticipated end | Anticipated \$ | Issued start | Issued end | Issued \$ | Carryforward | Total |
|---------------|--------------------|---------------------|---------------------|--------------------|---------------------|---------------------|---------------|---------------------|
| 1 | 12/01/2017 | 03/31/2023 | \$329,547.00 | 12/01/2017 | 03/31/2023 | \$329,547.00 | | \$329,547.00 |
| 2 | 04/01/2023 | 03/31/2024 | \$50,000.00 | 04/01/2023 | 03/31/2024 | \$50,000.00 | | \$0.00 |
| Total | Dec 1, 2017 | Mar 31, 2024 | \$379,547.00 | Dec 1, 2017 | Mar 31, 2024 | \$379,547.00 | \$0.00 | \$379,547.00 |
| Change | | Mar 31, 2024 | \$50,000.00 | | Mar 31, 2024 | \$50,000.00 | | \$50,000.00 |

Change: Only visible for a subamendment. The **Change** line is displayed to help identify the impact of the information entered without having to go back to the subagreement homepage.

- a) Changes to dates will display if the overall anticipated and/or issued start or end dates are changing. If the overall date is not changing, no value will be displayed.
- b) Changes to total Anticipated and/or Issued amounts will display in the change row. This is the difference between the total amount that was previously anticipated or issued and the new amount that is anticipated or issued.
- c) Any Carryforward amount entered should zero out (negative dollars from a prior period should equal positive dollars in current period. The only time a Carryforward amount should show in the “Change” line is if dollars are carried forward from a prior Segment.

The **Carryforward** column will always be present. Dollars only need to be entered in this column if year logic applies and funds are being carried from one period into another for the subrecipient. Dollars can be entered as a negative in the period they are moving from, and as a positive in the period they are moving into. If carryforward is being captured from a prior segment, the positive amount can be entered in the first budget period.

If the dates and dollars to issue are not within what has been captured in the primary award, the below warnings will appear on the Dates and dollars panel and will prevent the Central Office from completing the draft. Even though the draft cannot be completed in this state, the Department/School can still move forward with locking and routing for **Central review** so that the draft can continue through the workflow while the primary award structure is addressed. If the Central Office believes the amounts in the draft need to be updated, the draft will be rolled back to **Under development** or placed in **Clarifications requested**. The warnings will display as follows:

- **Anticipated dates fall outside of segment awarded anticipated dates:** This indicates the anticipated dates entered in the dates and dollars modal are not within the primary award anticipated dates.
 - **Dollars to issue are greater than sponsor approved dollars:** This indicates the issued amount is not within the sponsor approved amount entered in the primary award.
 - **Dates to issue are not within segment obligated dates:** This indicates the dates being issued are not within the primary awards awarded dates.
- Total anticipated dollars are not equal to sponsor anticipated dollars:** This indicates the anticipated dollars are not equal to what was held aside in the primary award. This is the only warning that does not prevent completion of the draft in the workflow and is just an FYI to the Central Office.

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FFATA statement of work summary

The **FFATA statement of work summary** is only required in a subagreement if the subrecipient is flagged as FFATA reportable. This information is required because it is included in any FFATA reports submitted through fsrs.gov by OSP FFATA reporters. The character limit is 4,000 characters to match the limit that is reportable. If the subrecipient

shouldn't be flagged as FFATA reportable, any member of the [OSP^FFATA Editor –university wide standing team](#) in GMAS can be contacted to help update the flag to no which will then remove the requirement for this section.

Note: The current and complete statement of work document must also be uploaded to the document repository.

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General information

General information is where high level information about the subagreement and subrecipient organization is displayed. During a subagreement, **Subrecipient principal investigator**, the **Description**, and the **Subagreement type** can be updated from here, but there is not corresponding action required to make these changes.

If in a subamendment, the **Subrecipient principal investigator** attribute was selected as changing, the field can be edited. If it was not selected as an attribute in a subamendment, only the **Description** and **Subagreement type** can be edited.

The **UEI number** related to the subrecipient organization, and the listing of **Organization risk assessments** is present in the General information section. If there is no UEI for the subrecipient organization, contact OSP-NewSponsorApprovals@harvard.edu to request that the UEI be added to the organizational profile in GMAS. If there are no assessments, contact your school assessor. If you do not have a school assessor, contact subrecipientmonitoring@harvard.edu.

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Previously issued

The previously issued panel shows information on prior fully executed amendments. Declined amendments do not display. The panel contains no editable fields and is only for reference.

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Other changes

Other changes is where information related to the changes needed in a subamendment can be entered. This section is meant to provide a space for information that is not captured from the other subamendment attributes. This section should not be used in place of other attributes if the data requirements in those sections are changing (for example: this section wouldn't be used to explain that year two needs to be issued, instead completing the Dates and dollars section would be more appropriate).

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Subrecipient contacts

The subrecipient contacts' names, email addresses (including central mailbox addresses), or other pertinent information should be included in this section. This is an open text field. This is always available to update.

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Primary performance location

This information will be required for the initial subagreement prior to executing if the subrecipient has been flagged as FFATA reportable. It can be updated in a subamendment if the primary place of performance attribute was selected. If entering an address within the United States, the zip plus four must be entered. If unknown, the plus four digits can be found [here](#) (use the zip code by address look up to get the four digits).

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Statuses

In this section, there is a brief description of each of the subagreement statuses in the workflow. There are 7 primary statuses and 5 secondary statuses (statuses that deviate from the typical workflow):

- Primary statuses
 - [Under development](#)
 - [Central Review](#)
 - [Ready for Drafting](#)
 - [Drafting](#)
 - [With subrecipient](#)
 - [Partially executed and Fully executed](#)
- [Secondary statuses](#)

Under development

While the draft is **Under development**, the details of the draft are being entered and relevant documents are being uploaded by the Department/School representative. There are no assignments during this stage, so the draft will appear as **Unassigned**. After all [Actions required](#) have been completed, and any supporting documents have been uploaded, the draft is locked and routed to the central reviewer by selecting the **Lock and route** button.

The Central reviewer can be selected or left empty (refer to your local guidance for what is appropriate in your area), and relevant comments can be added. Selecting **Done** will progress the draft to **Central review** and will appear in the Central reviewer's queue on the Sub dashboard.

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Central review

Once the draft has been locked and routed, the Central Reviewer will review the data entered, confirm that required documents have been uploaded to GMAS, confirm that the segment revision is aligned with what is being requested, and any other steps as defined in each Central Office's review process.

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Ready for drafting

Once reviewed, the central reviewer will select **Ready for drafting**. A Drafter can be selected, and relevant comments can be added. The draft will move to **Ready for drafting** and will appear in the Drafter's queue on the Sub dashboard. This status indicates the draft is ready to be worked on. It is not actually being drafted until the status moves forward to **Drafting**.

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Drafting

The assigned drafter will receive a notification and can see the draft request on the Sub dashboard. **Start Draft** will allow the Drafter to assign and add comments. Selecting Done will progress the draft to **Drafting**. The drafter will draft outside of GMAS. Each Central Office will determine if draft subagreements will be uploaded in the document repository.

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With subrecipient

When the draft is ready the Drafter will select **Send to subrecipient**. The Drafter will indicate what date the draft was sent and provide any details of how it was sent. Selecting Done will progress the draft to **With subrecipient**.

While in the **With subrecipient** status, the drafter, or any other Central Office representative can provide updates by selecting the pencil icon next to the "Subrecipient last contacted" label. Each contact entry is visible in the **Show additional update comments** expand. This information is also stored in the [History](#) link for future reference.

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Partially executed and Fully executed

When the signatures have been obtained, the date of the signatures will be recorded. If the subamendment is being unilaterally signed, only the Harvard signature will be required. Otherwise, when the subrecipient signature date is recorded, the draft can be move to **Partially executed**, or both the subrecipient and Harvard signature date can be

recorded, and the draft can be moved to **Fully executed**. Super users can edit the Subrecipient and Harvard signature dates after the amendment has been fully executed by using the pencil icon located next to the dates.

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Secondary statuses

There are five secondary statuses that a draft can be moved into by the Central Office throughout the workflow:

1. **Clarifications requested** – Indicates there is an open question related to the draft. This status is available when the draft is between **Central review** and **Partially executed**.
2. **Indefinite hold** – Indicates there is something preventing the draft from moving forward. This status is available when the draft is between **Central review** and **Partially executed**.
3. **In review** – Indicates the draft needs to be reviewed before it can be sent to the subrecipient. This status is available when the primary status is **Drafting**.
4. **In negotiation** – Indicates the draft is in negotiations. This status is available when the draft is **With subrecipient**.
5. **Ready for revision** – Indicates that the draft has been fully executed and is waiting for a segment revision (action memo). This status is automatically applied when a draft is moved to **Fully executed** and automatically cleared when a segment revision is committed (action memo is issued). The latest **Fully executed** subagreement or subamendment for a subrecipient can be placed into Ready for revision manually as well.

Moving into the secondary status

Drafts can be placed into any of the above secondary statuses by a Central Office representative by opening the secondary action menu (gear icon) button while the draft is in a primary status. The menu will only list the secondary statuses that can be moved into while in the current primary status.

Subamendment 2 for 5107476
 Morehouse School of Medicine
 Ngozi Anachebe

History (12) | Related links | Info | Start draft |

Under development | Central review | **Ready for drafting** | Drafting | With subrecipient | Partially executed

Moved back to Ready for drafting from Clarifications requested on Jan 28, 2023 by Jess Perreault
 Status update comment 416354
 Show additional update comments

Central reviewer Fernan Balsalubre
 Drafter Kelly Gamache
 Completion priority Normal

Rollback
 Delete
 Turn notifications on
 Request clarifications
 Indefinite hold

For all secondary statuses except Ready for revision, the following contact type options are available:

- Internal – Allows assigning to someone at Harvard (a person look-up field will be presented).
 - The **individual assigned will receive a GMAS notification** indicating the draft is now with them, and they can update with more information and/or remove the secondary status and put the draft back into the primary workflow.
- External – Allows assigning to someone outside of Harvard (a free text entry field will appear where the contact can be documented).
 - The individual or area assigned is not within the Harvard community, so **there will be no GMAS notification**. The Central Office representative who placed the draft into the secondary status will be responsible for updating or removing the secondary status when appropriate.

If moving into the secondary status of **Ready for revision**, the contact types are different:

- Internal –A drop-down field will be presented where individuals within the Central Office can be selected.
 - The **individual assigned will receive a notification**.
- Operations – This selection indicates a revision is being handed off to the Operations group within the Central Office, but not specifically assigned to a person.
 - Since it is not being assigned to a specific person, **there will be no GMAS notification sent**.

Updating or removing a secondary status

When a draft is in a secondary status, the only available workflow options are to remove from the secondary status or make an update to the secondary status. These actions can be done from the primary and secondary action buttons when in a secondary status.

If the secondary status is assigned to someone at Harvard that has the appropriate security to access the segment, that individual regardless of their security settings will be able to provide secondary status updates and remove the secondary status placing it back into the primary workflow. Central can always perform these actions as well.

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