Facility Use Agreement Process
End-User Guide

Last Updated: July 18, 2025

Overview

This document is intended for use by a Yale department as a guide for completing the Facility Use Agreement process using the OnBase system.

Forms

All Facility Use Agreement intake forms are located on the Yale OGC Agreement Requests webpage. Please access this page to submit an intake form to initiate your request for a Facility Use Agreement.

Intake Forms:

Facility Use Agreements

- Athletic Facilities
- Dixwell-Yale Community Learning Center
- Dwight Hall
- Generic (all facilities other than those listed here)
- Generic (Yale School of Medicine)
- Myers Forest
- Outdoor Education Center
- Yale Affiliate: Outdoor Education Center (for Yale affiliates only)

License Agreements

- Battell Chapel
- Dwight Hall

YC&E Summer Residential Agreements (for YC&E use only)

- Summer Entryway Single
- Summer Entryway Multi
- Summer HOB Single
- Summer HOB Multi

Process Instructions

1. Submit an Intake Form to initiate your request.

From the Yale OGC Agreement Requests webpage, please select the form you wish to submit. The form will open in a new tab. Complete the form, scroll to the bottom of the form, and select Submit. Your request will be reviewed by the Office of the General Counsel.

If changes or additional information to your Intake Form are required, you will receive an email notification specifying the requested changes. Make these changes by directly updating the Intake Form via the link in your email.

2. Forward the agreement template to the external party.

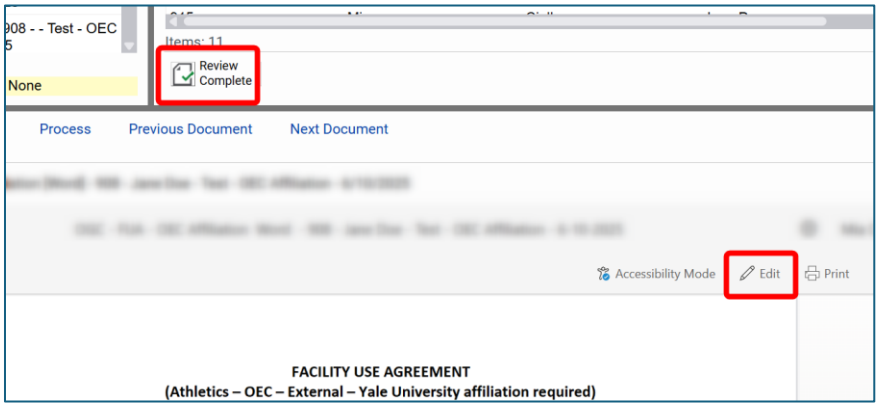
After your submission of the intake form, you will receive an email confirmation of your submission. This email will contain a link to the agreement template. Please forward the link to the external party for their review. Please instruct them to contact you should they have any issues and/or questions regarding Yale's requirements.

3. Review and approve the draft agreement.

Once a draft Facility Use Agreement is ready for your review, you will receive an email requesting your review of the draft.

To review a draft agreement:

- Log into OnBase to access the Facility Use Agreement System. Click the "bento box"  icon in the upper left corner and select **Open Workflow**. A new browser window may open. In the left navigation pane, select **OGC1 Department Draft Contract Review**. Select the draft agreement.
- To approve the draft without any edits, click the "Review Complete" button in the middle of the screen, above the document.



- Optionally, to edit the draft, click the "Edit" button next to the pencil icon to the upper right corner above the document. The draft will open in a new browser window.

  Edit the draft and close the window when all changes are complete (changes will be saved automatically). Please note that Track Changes will be on by default – do not change this setting.

  Return to the OnBase system in your browser. You can refresh your window to confirm your changes now appear on the draft. Click the "Review Complete" button.

If changes or additional information to the draft are required by either the Office of the General Counsel, the Risk Management Office, or the Tax-Exempt Bond Compliance Review Office after their review, you will receive an email notification specifying the requested changes.

To update a draft agreement:

- Log into OnBase to access the Facility Use Agreement System. Click the "bento box"  icon in the upper left corner and select **Open Workflow**. A new browser window may open. In the left navigation pane, select **OGC1 Department Draft Contract Corrections**. Select the draft agreement.
- Click the "Edit" button next to the pencil icon to the upper right corner above the document. The draft will open in a new browser window.

  Edit the draft and close the window when all changes are complete (changes will be saved automatically). Please note that Track Changes will be on by default – do not change this setting.

  Return to the OnBase system in your browser. You can refresh your window to confirm your changes now appear on the draft. Click the "Corrections Complete" button.
- If the requested changes are regarding Exhibit A-1, select "Replace Exhibit A-1" to upload a new Exhibit A-1 file from your computer. Then select "Corrections Complete".

If changes or additional information to the COI are required by the Risk Management Office, you will receive an email notification requesting a new COI document. Click the link in the email to upload a new COI document into OnBase.

4. Agreement is sent out for signature via DocuSign.

After a final review from the Office of the General Counsel, the final version of the agreement will be sent out for signature via DocuSign. The external party will receive an email from the Yale DocuSign account requesting their signature. Once the external party signs, DocuSign will request a signature from the Yale Controller's Office.

After all parties have signed the agreement, they will receive an email from DocuSign with a link to access the fully executed agreement. You will also receive a separate email with a copy of the agreement attached.

How to Access a Completed Contract

Once a contract has been fully executed, it will remain in the OnBase workflow until the contract expiry date. After the contract expires, the contract will leave the OnBase workflow and be archived within the OnBase system. Archived contracts can be accessed at any time.

To access an active contract (before the contract expiry date):

- Log into OnBase to access the Facility Use Agreement System. Click the "bento box"  icon in the upper left corner and select **Open Workflow**. A new browser window may open. In the left navigation pane, select **OGC1 Completed Contract Hold**.
- Active contracts will be listed and can be accessed from this location.

To access an expired contract:

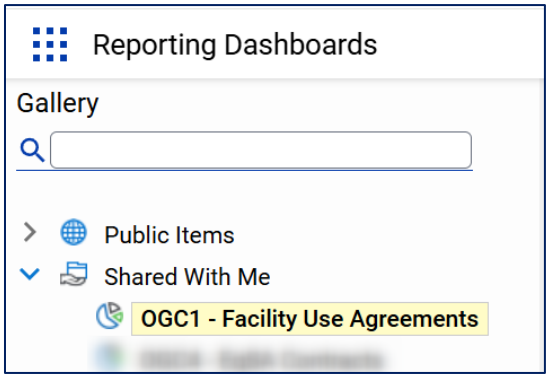
- Log into OnBase to access the Facility Use Agreement System. Click the "bento box"  icon in the upper left corner and select **Custom Queries**. In the upper left corner, select **OGC1 Facility Agreements (Agreement Only)** or **OGC1 Facility Agreements (All Docs)**, depending on whether you want to search for the agreement files only or for all agreement and supporting documents as well, respectively.
- Search by entering a Date Range or the Agreement Number. Double-click on an agreement to open it within the viewer.
  Please note that if the Document Type is "OGC - FUA – Full File", this means that the file will contain all of the agreement, supporting documents (including any Exhibits and the COI), the intake form, and any TEBC notes.

How to Check the Status of your Request

At any point throughout the process, from the submission of the intake form until the contract expires, you can check the status of your request by accessing the OnBase Reporting Dashboard.

To access the Reporting Dashboard:

- Log into OnBase to access the Facility Use Agreement System. Click the "bento box" icon in the upper left corner, scroll to the bottom of the menu, and under "Reporting Dashboards", select **Gallery**.
- Click the arrow to the left of "Shared With Me". Select **OGC1 – Facility Use Agreements**.



- View the Reporting Dashboard.