

## **Joint Health Sciences Affiliation Agreements Standard Operating Procedure**

**Effective Date:** June 2026  
**Approved by:** Health Sciences Academic Associate Deans

### **1. Purpose**

This SOP establishes a standard process for reviewing, routing, and executing joint affiliation agreements (AAs) across University of Washington Health Sciences schools. It applies when an external agency or clinical site requests a single affiliation agreement covering multiple HS schools, rather than individual school-level agreements.

This SOP covers standard joint agreements only. School-specific amendments or outlier provisions are the responsibility of the individual school and are outside the scope of this procedure.

### **2. Scope**

This procedure applies to the following schools when named as parties to a joint affiliation agreement:

- School of Dentistry
- School of Medicine
- School of Nursing
- School of Pharmacy
- School of Public Health
- School of Social Work
- College of Arts and Sciences (Natural Sciences)

### **3. Roles and Responsibilities**

| <b>Role</b>                                   | <b>Responsibility</b>                                                                                                     |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Receiving school                              | First point of contact for agency request; notifies Health Sciences Services to initiate the review and opt-out process   |
| Health Sciences Services                      | Sends opt-out notification to all schools; confirms participating schools; coordinates DocuSign routing                   |
| UW Attorney General (AG) Office               | Reviews and approves non-template contract language (not required for UW-approved template agreements)                    |
| Director, HS Strategic Planning & Development | Final signatory on the joint agreement on behalf of Health Sciences                                                       |
| Individual schools                            | Review joint agreement; opt out within the designated window if not a party; manage school-specific amendments separately |

## 4. Procedure

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### Step 1 — Agency submits joint AA request

When an external agency or clinical site requests a joint affiliation agreement covering multiple HS schools, the request is received by whichever school the agency contacts first. That school is designated the receiving school and is responsible for notifying Health Sciences Services to initiate the process.

### Step 2 — Contract review

**UW-approved template agreements:** If the site is using the UW-approved affiliation agreement template, AG Office review is not required. Proceed directly to Step 4.

**Non-template agreements:** If the site is using its own agreement or a modified version of the UW template, the receiving school must submit the draft to the UW Attorney General's Office for legal review. The receiving school coordinates any revisions between the agency and the AG Office until the contract language is approved. Agreements not approved by the AG Office should not proceed to signature routing.

### Step 3 — Determine participating schools

The default is to include all Health Sciences schools listed in Section 2. Upon notification from the receiving school, Health Sciences Services will send an opt-out notice to all schools, including a copy of the agreement and instructions for opting out. Schools have 5 business days from the date of the notice to notify Health Sciences Services that they do not need to be a party to the agreement.

Schools that do not respond within the opt-out window are assumed to be participating and will be included in the DocuSign routing.

**DocuSign note:** DocuSign does not support an “optional signer” feature — a recipient added as a signer must sign, and the built-in “Decline to Sign” option voids the entire envelope. For this reason, school opt-outs are confirmed before the DocuSign envelope is created, not during the signing workflow.

### Step 4 — Health Sciences Services facilitates signature routing

Once AG review is complete (if required) and participating schools are confirmed, Health Sciences Services will:

1. Prepare the document for routing in DocuSign using only the confirmed participating school signatories (see Section 5).
2. Route the document to the authorized signatory at each participating school.
3. Route the document to the Director for Health Sciences Strategic Planning & Development as the final HS signatory.
4. Configure DocuSign to automatically distribute a copy of the fully executed agreement to all school signatories upon completion.

### Step 5 — School-specific amendments (if needed)

If any participating school has unique programmatic or operational requirements not addressed by the standard joint agreement, that school is responsible for negotiating and executing a separate amendment directly with the agency. Such amendments are outside the scope of this SOP and do not affect the joint agreement process.

## **5. School-Authorized Signatories**

The following individuals are currently authorized to sign joint affiliation agreements on behalf of their respective schools. Health Sciences Services should confirm this list remains current prior to each routing.

| <b>School</b>              | <b>Signatory</b>                           | <b>Title</b>                                        |
|----------------------------|--------------------------------------------|-----------------------------------------------------|
| School of Dentistry        | Dr. Andre Ritter                           | Dean                                                |
| School of Medicine         | Heather McPhillips, M.D.,<br>M.P.H.        | Vice Dean for Academic Affairs                      |
| School of Nursing          | Jennifer Sonney, PhD,<br>ARNP, FAAN, FAANP | Associate Dean of Academic<br>Affairs               |
| School of Pharmacy         | Andrew Brusletten, MA                      | Assistant Dean for Program<br>Operations, OPPE      |
| School of Public Health    | Liz Lancaster, Director                    | Office of the Dean: Finance,<br>Administration & IT |
| School of Social Work      | Jennie Romich                              | Associate Dean for Academic<br>Affairs              |
| College of Arts & Sciences | Daniel Pollack, Ph.D.                      | Divisional Dean, Natural<br>Sciences                |
|                            |                                            |                                                     |

## **6. Document Retention**

A copy of the fully executed joint agreement will be routed automatically to each school's signatory via DocuSign upon completion. Health Sciences Services will retain the master executed copy in accordance with UW records retention requirements.

## **7. Exceptions**

Any deviation from this SOP requires written approval from the Director for Health Sciences Strategic Planning & Development. Exceptions should be documented and retained with the relevant agreement file.

## **8. Review and Revision**

This SOP will be reviewed every three years by the Academic Associate Deans group and updated as needed to reflect changes in signatory authority, university policy, or DocuSign processes.