

IBISResearch: Create & Submit a Proposal

Office of The Vice Provost for Research & Scholarship

Workshop Etiquette

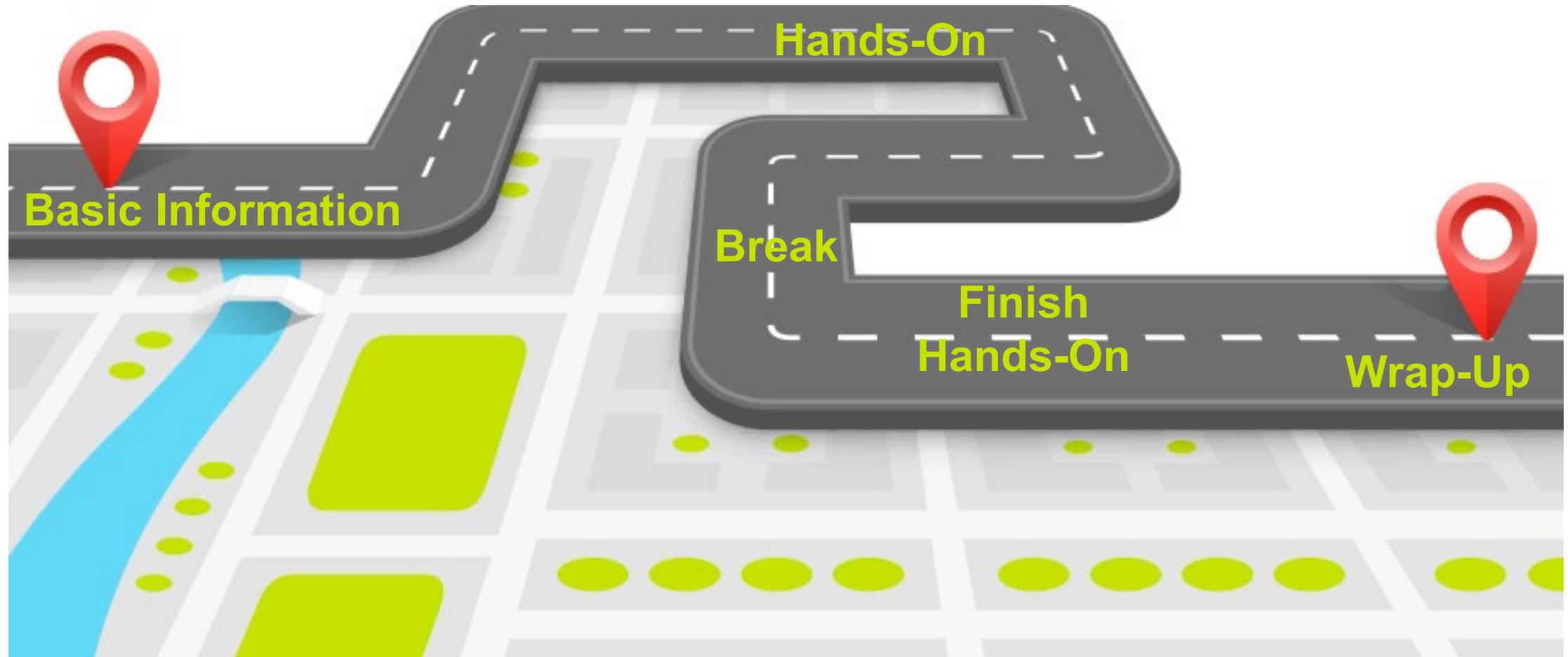


Avoid Multitasking



Ask Questions

Agenda Roadmap



Introductions

What department do you work in?

Type in the chat

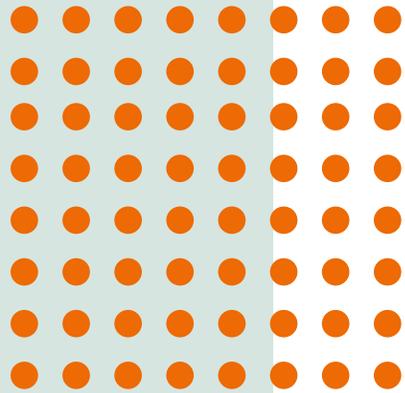
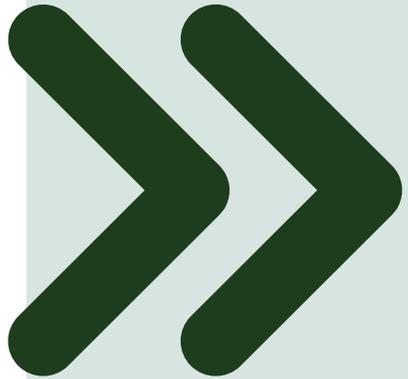


Learning Objectives

After this session you will be able to:

1. Describe IBISResearch Terminology
2. Demonstrate the navigation of IBISResearch
3. Practice how to create a funding proposal, budgets and SF424 and submit for review





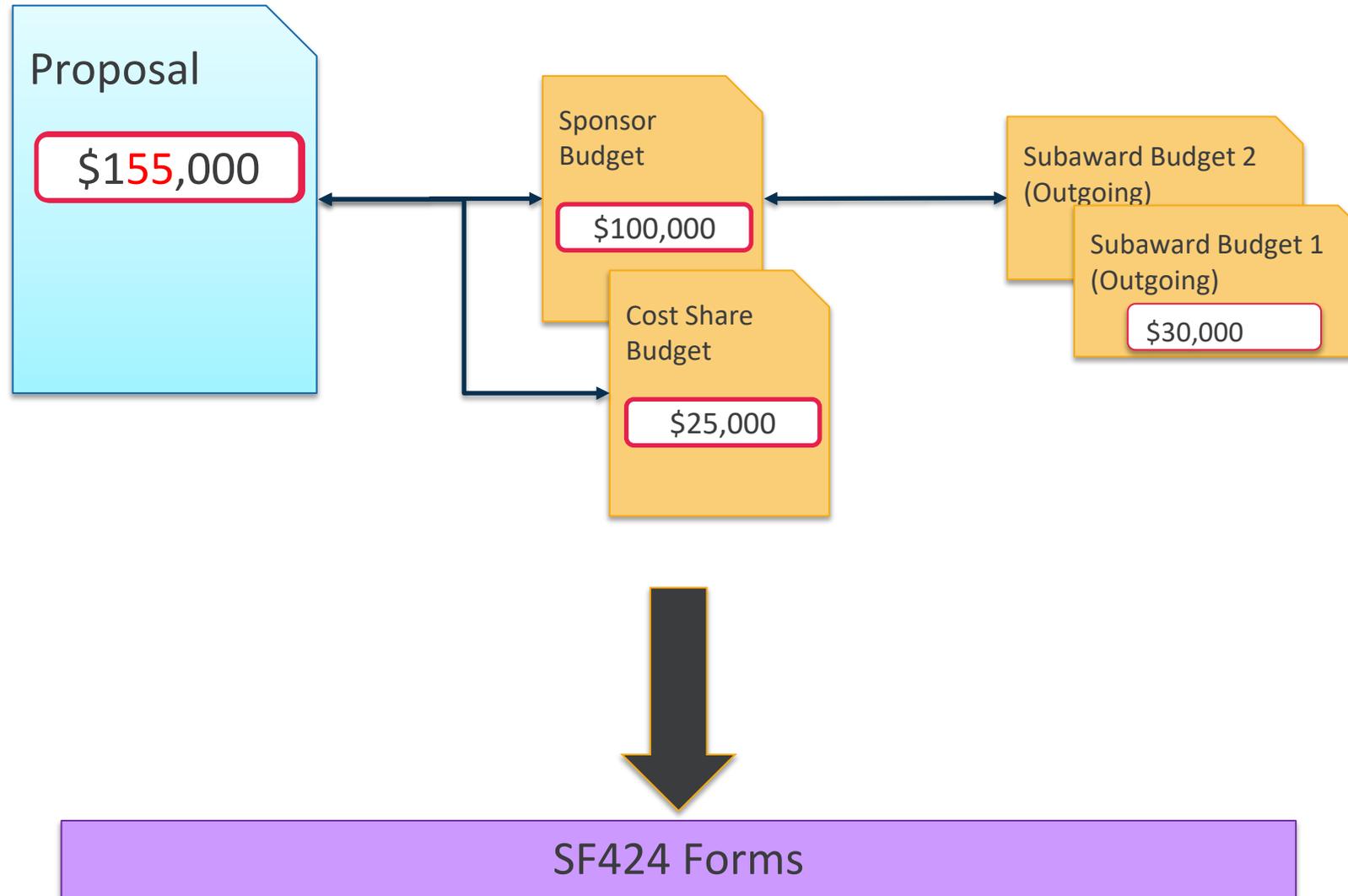
Introduction to IBISResearch

IBISResearch is a **comprehensive solution for proposal submission, agreement creation and award management.**

The system ensures successful proposal creation and budget development, electronic submission to Grants.gov, creation and negotiation of agreements and post-award management capabilities including award setup, requests for modifications, agreement amendments, and budget reconciliation to enter and track sponsor approved budgets.

 IBISResearch

Proposal Relationships



Application Types

Types	Definition
New (Type 1)	An application being submitted for the first time.
Resubmission	An application the Sponsor reviewed and declined to fund, which the investigator has modified and is resubmitting for consideration.
Revision/Supplement (Type 3)	A competitive application requesting additional funding for an active award.
Renewal (Type 2)	A competitive application for a new project with a scope based on or related to a current project which is expiring.
Continuation (Type 5)	Noncompeting Continuation. Request or award for a subsequent budget period within a previously approved project for which a recipient does not have to compete with other applications.

All Funding Proposals will be created in

IBISResearch

Department and ORA approvals are obtained via IBISResearch

How do you send the proposal to the sponsor?

1. *Submit via IBISRESEARCH*
 - Federal Funding Proposals that go through Grants.gov (*exceptions*)
2. *Submit through their sponsor systems (Assist, NSPIRES...)*
 - *Federal Proposal Exceptions: Program Projects, Center Grants, NASA, NSF*
 - Non-Federal Funding Proposals

Submission Types:

- Federal
- Foundation
- Incoming Subawards
- Industry
- State
- Clinical Trial

All submission types must be **created and routed** through IBISResearch:

- to the department for review and approval
- and to ORA for review and approval

If Routed System to System in IBISResearch

If you answer yes to #3 for Federally funded (except Program Projects, Center Grants, NASA, NSF), complete #4.

Submission Information

1. Submission type: ⓘ
Federal

2. Direct sponsor: ⓘ
National Institutes of Health (NIH)

3. Will this application be submitted system-to-system?
 Yes No [Clear](#)

4. Type a package ID, opportunity ID, or CFDA number, and click Find. ⓘ

Package ID: [Find...](#) [Clear](#) [Refresh Form Support](#)

Opportunity ID (PA or RFA number):

CFDA number:

Competition ID:

Not System to System

1. Answer No to #3 for the following:

- Program Projects
- Center Grants
- NASA
- NSF
- Non-Federally Funded

2. Complete information in the **pop-up** screen

3. Upload the submission documents in #6

3. * Will this application be submitted system-to-system?
 Yes No [Clear](#)

4. Type a package ID, opportunity ID, or CFDA number, and click Find. ?

Package ID: [Find...](#) [Clear](#) [Refresh Form Support](#)

Opportunity ID:

CFDA number:

Competition ID:

Package Id	Opportunity Id	Title
PKG00055328	PA-FN-R01	G.g. ... and NIH Ext-UAT FOA (R01-Clinical Trial Not Allowed)

If the desired opportunity is not listed above, type its ID and title below:

a. Package ID:

b. Opportunity ID:

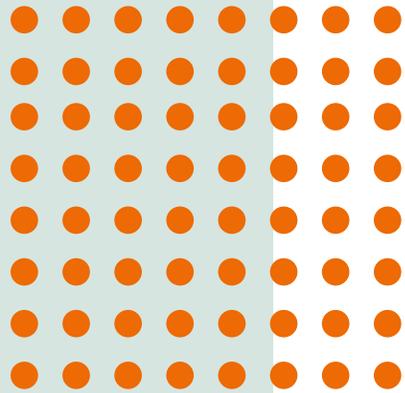
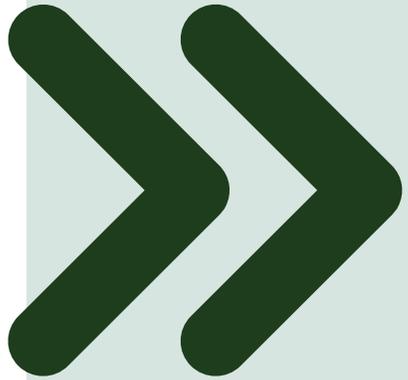
c. Opportunity title:

5. NIH grant type (if applicable):

6. Add any general submission documents:

[+ Add](#)

Name	Version
There are no items to display	



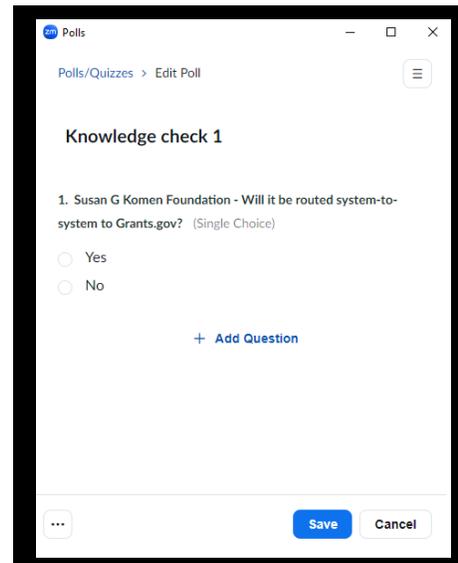
Knowledge Check Activity

Knowledge Check Instructions

You will decide for each knowledge check if it will be routed system to system through grants.gov.

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF



The screenshot shows a mobile application interface for creating a poll. At the top, it says "Polls" and "Polls/Quizzes > Edit Poll". The main title is "Knowledge check 1". Below that, there is a question: "1. Susan G Komen Foundation - Will it be routed system-to-system to Grants.gov? (Single Choice)". There are two radio button options: "Yes" and "No". Below the options is a blue "+ Add Question" button. At the bottom, there are three buttons: a menu icon (three dots), a blue "Save" button, and a "Cancel" button.

Knowledge Check #1

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

Susan G. Komen Foundation Career Grant for Established Investigator



Will it be routed System-to-System to Grants.gov?

- Yes
- No

Knowledge Check #1 Answer

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

Susan G. Komen Foundation Career Grant for Established Investigator



Will it be routed System-to-System to Grants.gov? **No**

Knowledge Check #2

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

National Institute of Aging Program Project Grant



National Institute on Aging

Is it routed System-to-System to Grants.gov?

- Yes
- No

Knowledge Check #2 Answer

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

National Institute of Aging **Program Project** Grant



National Institute on Aging

Is it routed System-to-System to Grants.gov? **No**

Knowledge Check #3

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

Supplement to NIMD Minority and Health Disparities



Is it routed System-to-System to Grants.gov?

- Yes
- No

Knowledge Check #3 Answer

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

Supplement to NIMD Minority and Health Disparities



Is it routed System-to-System to Grants.gov? **Yes**

Knowledge Check #4

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

Incoming Subcontract from The Children's Trust



Is it routed System-to-System to Grants.gov?

- Yes
- No

Knowledge Check #4 Answer

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

Incoming Subcontract from The Children's Trust



Is it routed System-to-System to Grants.gov? **No**

Knowledge Check #5

Yes = Federally Funded unless it is an exception

No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

National Endowment for the Arts Challenge America Grant

 NATIONAL
ENDOWMENT for the ARTS

Is it routed System-to-System to Grants.gov?

- Yes
- No

Knowledge Check #5 Answer

Yes = Federally Funded unless it is an exception

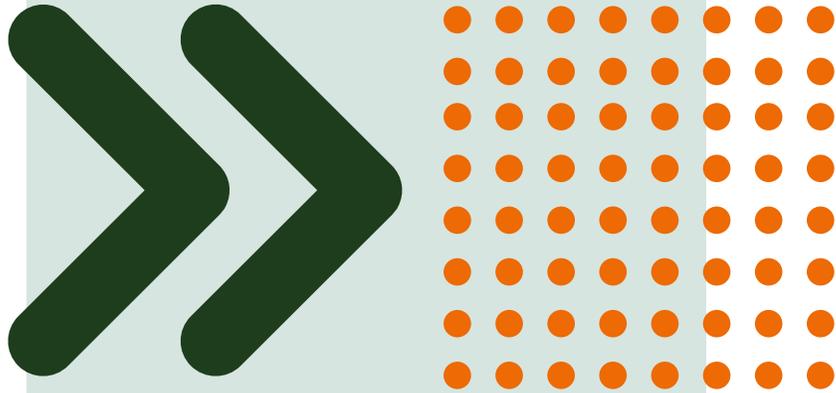
No = Non-Federally Funded and Exceptions: Program Projects, Center Grants, NASA, NSF

National Endowment for the Arts Challenge America Grant



NATIONAL
ENDOWMENT for the ARTS

Is it routed System-to-System to Grants.gov? **Yes**

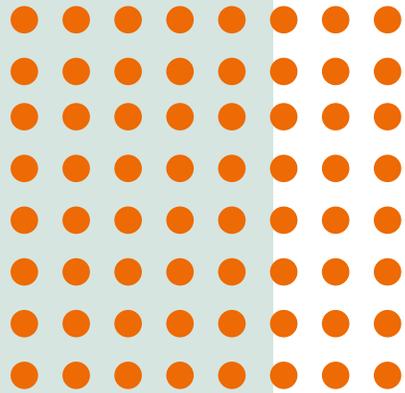
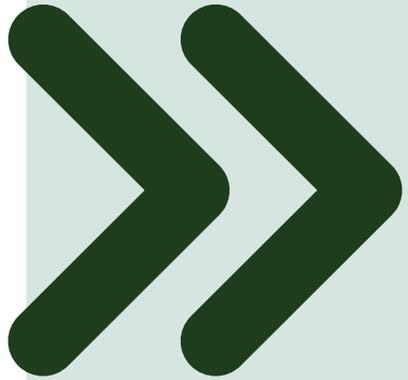


IBISResearch Terminology

IBISResearch Terminology

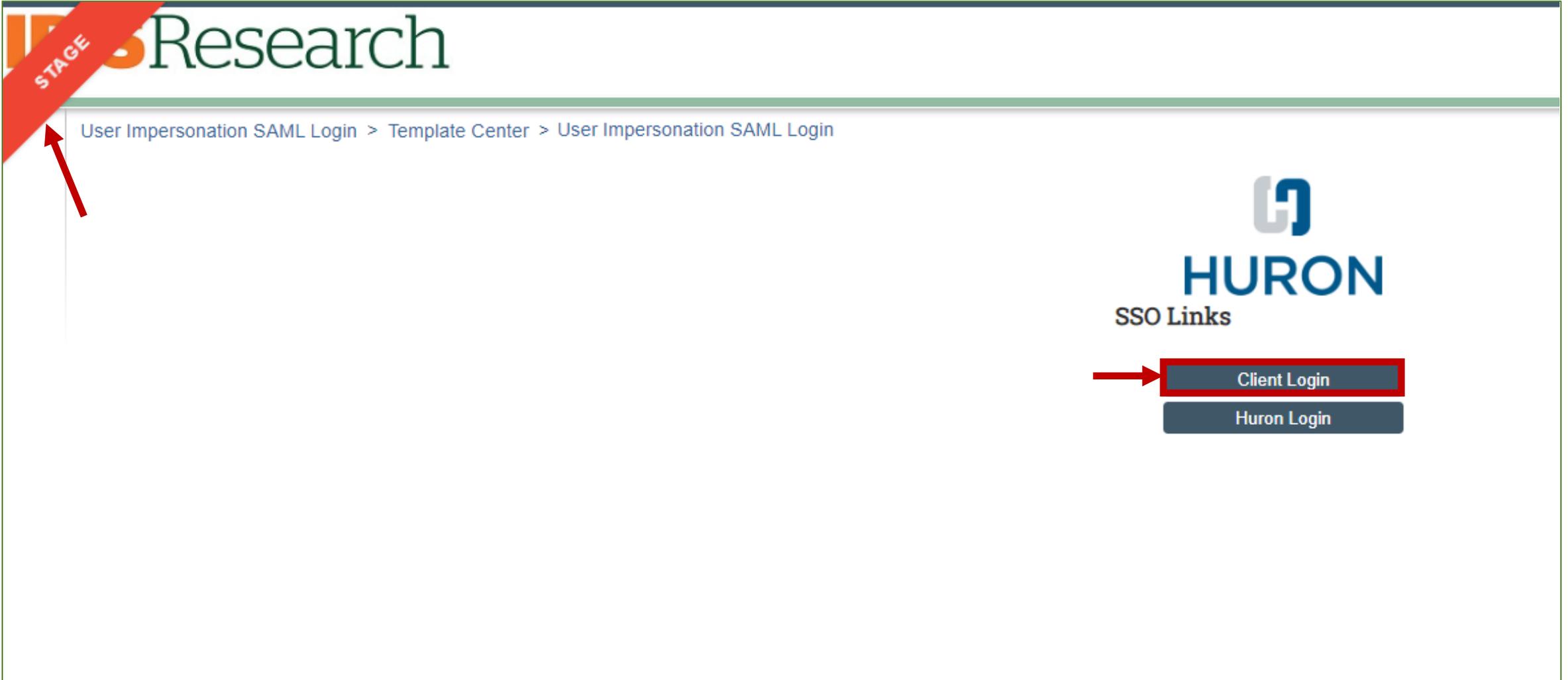
1. Ancillary Review
2. Funding Award
3. Funding Proposal
4. Guest List
5. SmartForm
6. Specialist
7. SPO
8. State
9. Study Staff
10. Tags

IBISResearch Terminology	Definition
Ancillary Review	Refers to reviews by other offices or individuals to provide feedback or higher approval. Ancillary reviews are conducted in parallel with Department and ORA reviews. For example, the waiver of Indirect Costs requires an Ancillary Review. Ancillary Reviews are typically initiated by the PI/Study Staff and approval is required prior to submission of the proposal.
Funding Award	This is an award in IBISResearch. Award numbers in IBISResearch will begin with IBIS. For example: IBIS0000135.
Funding Proposal	The proposal record created in IBISResearch to document and track the request for funding. This is similar to the InfoEd proposal. Funding Proposals are identified by the FP Number, for example: FP0000036.
Guest List	List of users who have edit or view only privileges in IBISResearch.
SmartForm	These are the pages listing the questions or uploads required to complete the proposal, award, or agreement. These are "smart" form pages because they will hide or show relevant questions based upon selections made and questions answered previously. The Funding Proposal in IBISResearch is an example of a SmartForm.
Specialist	This is a role in IBISResearch and refers to the individuals in the Office of Research Administration handling grants and agreements.
SPO	SPO refers to the Office of Research Administration.
State	State is the status in which the proposal, award, or agreement is in the IBISResearch workflow. In IBISResearch, the state is indicated on the top left in an orange box. For example, if a proposal is in the Department Review state, it means it was routed to the responsible department for review, and it is pending approval by the department.
Study Staff	This is a role in IBISResearch that refers to individuals who have edit rights for a proposal/agreement.
Tags	Tags are special designations or methods of identifying certain information in a proposal. UM uses Tags to collect the primary scientific classification for each proposal. This is a required entry on all Funding Proposals, and it is recommended that the PI/Study Staff select the scientific classification which apply to the proposal.



Navigating the System

Client Login – Staging website



The screenshot shows the IIR Research staging website. A red diagonal banner in the top left corner contains the word "STAGE". The breadcrumb navigation path is "User Impersonation SAML Login > Template Center > User Impersonation SAML Login". The main content area features the Huron logo and the text "SSO Links". Below this, there are two buttons: "Client Login" and "Huron Login". The "Client Login" button is highlighted with a red border and a red arrow points to it from the left.

Sign in using your University of Miami Credentials



Sign in with your University of Miami credentials
(either primary email address or CaneID):

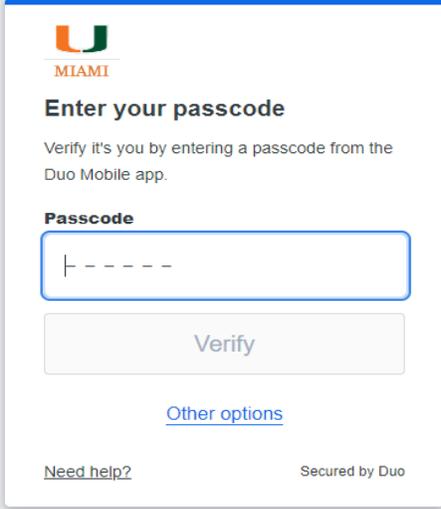
Sign in

Forgot your CaneID or password?

Visit the CaneID Self-Service webpage to manage
and/or recover your CaneID or password:
caneidhelp.miami.edu

For technical support, contact the UMIT Service Desk
at (305) 284-6565 or help@miami.edu.

Duo Authentication




MIAMI

Enter your passcode

Verify it's you by entering a passcode from the Duo Mobile app.

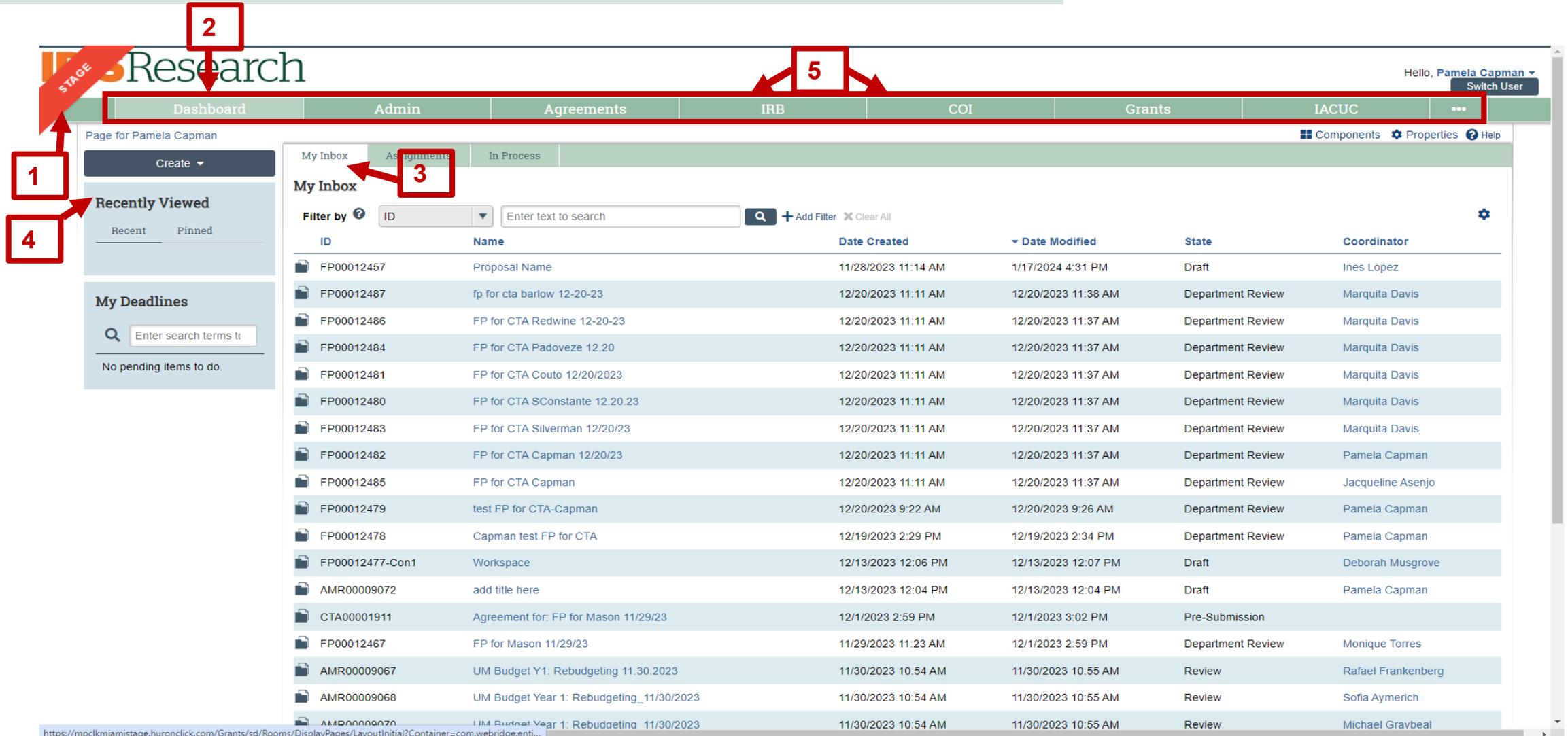
Passcode

Verify

[Other options](#)

[Need help?](#) Secured by Duo

Dashboard



The screenshot shows the Research dashboard interface. Red callout boxes highlight the following elements:

- 1**: Points to the 'STAGE' logo in the top left corner.
- 2**: Points to the 'Research' text in the top left header.
- 3**: Points to the 'My Inbox' tab in the sub-navigation bar.
- 4**: Points to the 'Recently Viewed' section on the left sidebar.
- 5**: Points to the 'IRB' tab in the main navigation bar.

The main content area displays a table of items in the 'My Inbox' section. The table has columns for ID, Name, Date Created, Date Modified, State, and Coordinator.

ID	Name	Date Created	Date Modified	State	Coordinator
FP00012457	Proposal Name	11/28/2023 11:14 AM	1/17/2024 4:31 PM	Draft	Ines Lopez
FP00012487	fp for cta barlow 12-20-23	12/20/2023 11:11 AM	12/20/2023 11:38 AM	Department Review	Marquita Davis
FP00012486	FP for CTA Redwine 12-20-23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
FP00012484	FP for CTA Padoveze 12.20	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
FP00012481	FP for CTA Couto 12/20/2023	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
FP00012480	FP for CTA SConstante 12.20.23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
FP00012483	FP for CTA Silverman 12/20/23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
FP00012482	FP for CTA Capman 12/20/23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Pamela Capman
FP00012485	FP for CTA Capman	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Jacqueline Asenjo
FP00012479	test FP for CTA-Capman	12/20/2023 9:22 AM	12/20/2023 9:26 AM	Department Review	Pamela Capman
FP00012478	Capman test FP for CTA	12/19/2023 2:29 PM	12/19/2023 2:34 PM	Department Review	Pamela Capman
FP00012477-Con1	Workspace	12/13/2023 12:06 PM	12/13/2023 12:07 PM	Draft	Deborah Musgrove
AMR00009072	add title here	12/13/2023 12:04 PM	12/13/2023 12:04 PM	Draft	Pamela Capman
CTA00001911	Agreement for: FP for Mason 11/29/23	12/1/2023 2:59 PM	12/1/2023 3:02 PM	Pre-Submission	
FP00012467	FP for Mason 11/29/23	11/29/2023 11:23 AM	12/1/2023 2:59 PM	Department Review	Monique Torres
AMR00009067	UM Budget Y1: Rebudgeting 11.30.2023	11/30/2023 10:54 AM	11/30/2023 10:55 AM	Review	Rafael Frankenberg
AMR00009068	UM Budget Year 1: Rebudgeting_11/30/2023	11/30/2023 10:54 AM	11/30/2023 10:55 AM	Review	Sofia Aymerich
AMR00009070	UM Budget Year 1: Rebudgeting_11/30/2023	11/30/2023 10:54 AM	11/30/2023 10:55 AM	Review	Michael Gravbeal

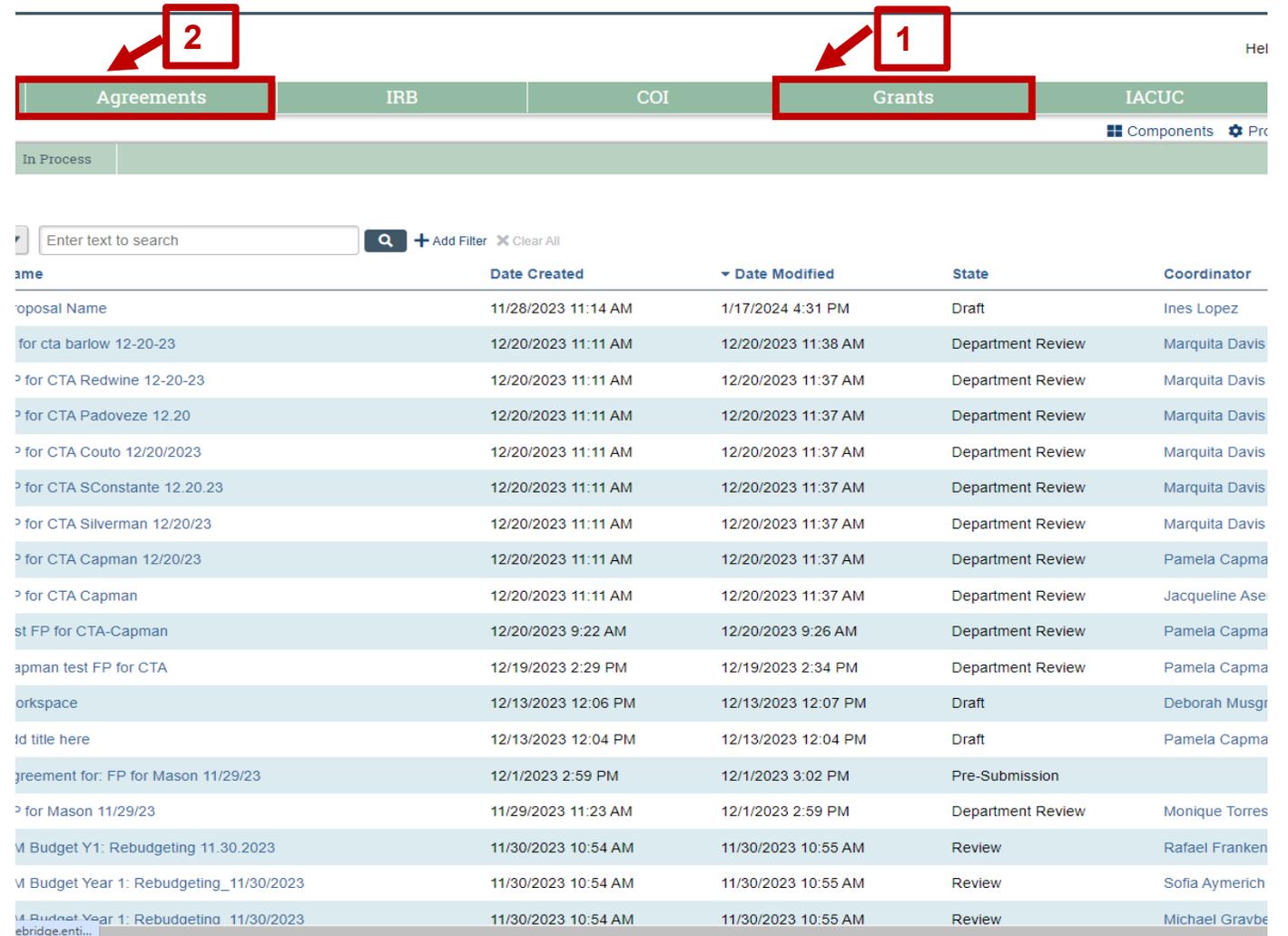
Navigate between Grants & Agreements

1. Grants

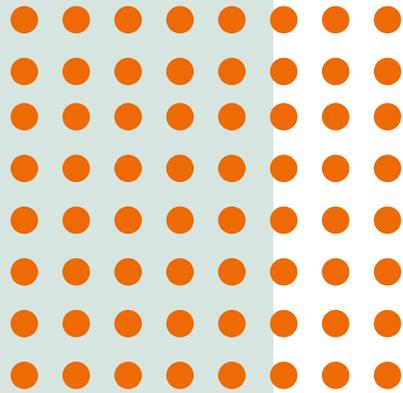
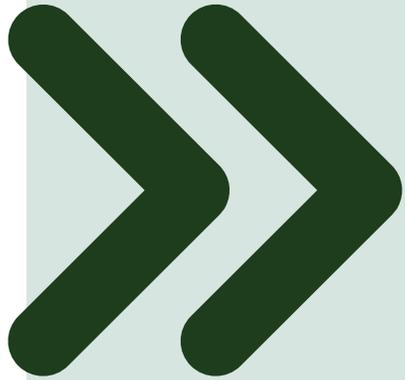
- Create Proposals
- Manage Awards
- Manage Award Modification Requests

2. Agreements

- Manage Contracts
- Manage Agreements



Name	Date Created	Date Modified	State	Coordinator
Proposal Name	11/28/2023 11:14 AM	1/17/2024 4:31 PM	Draft	Ines Lopez
for cta barlow 12-20-23	12/20/2023 11:11 AM	12/20/2023 11:38 AM	Department Review	Marquita Davis
for CTA Redwine 12-20-23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
for CTA Padoveze 12.20	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
for CTA Couto 12/20/2023	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
for CTA SConstante 12.20.23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
for CTA Silverman 12/20/23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
for CTA Capman 12/20/23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Pamela Capma
for CTA Capman	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Jacqueline Ase
st FP for CTA-Capman	12/20/2023 9:22 AM	12/20/2023 9:26 AM	Department Review	Pamela Capma
apman test FP for CTA	12/19/2023 2:29 PM	12/19/2023 2:34 PM	Department Review	Pamela Capma
orkspace	12/13/2023 12:06 PM	12/13/2023 12:07 PM	Draft	Deborah Musgr
ld title here	12/13/2023 12:04 PM	12/13/2023 12:04 PM	Draft	Pamela Capma
greement for: FP for Mason 11/29/23	12/1/2023 2:59 PM	12/1/2023 3:02 PM	Pre-Submission	
for Mason 11/29/23	11/29/2023 11:23 AM	12/1/2023 2:59 PM	Department Review	Monique Torres
M Budget Y1: Rebudgeting 11.30.2023	11/30/2023 10:54 AM	11/30/2023 10:55 AM	Review	Rafael Franken
M Budget Year 1: Rebudgeting_11/30/2023	11/30/2023 10:54 AM	11/30/2023 10:55 AM	Review	Sofia Aymerich
M Budget Year 1: Rebudgeting_11/30/2023	11/30/2023 10:54 AM	11/30/2023 10:55 AM	Review	Michael Gravbe



Grants Project Listing Page

Grants Project Listing Page

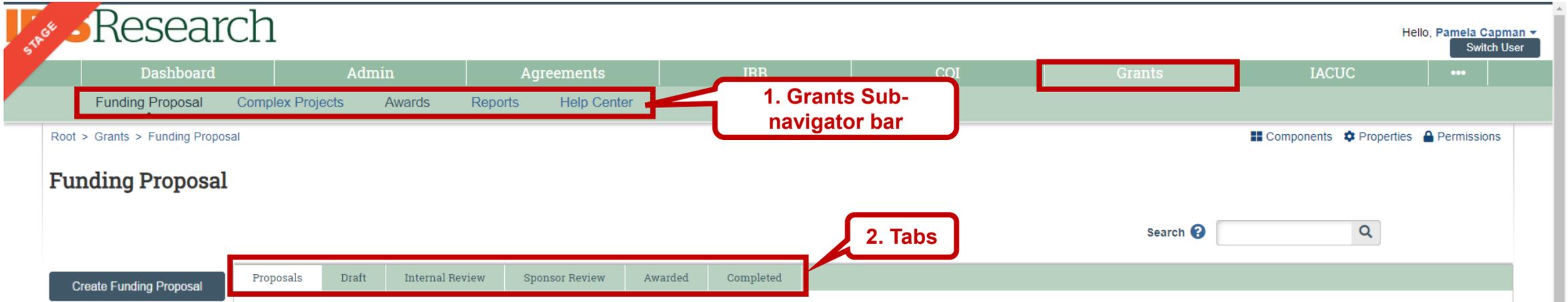
The Grants Project Listing Page Shows the records you have permission to see.

Users have permission to see records (proposals, awards, agreements) they are associated with based on the following roles:

- PI
- Project Personnel
- Administrative Personnel
- Guest List editor/viewer
- Ancillary Reviewer
- Specialist in ORA



Grants Sub-navigator Bar & Tabs



STAGE Research

Dashboard Admin Agreements IRB COI Grants IACUC

Funding Proposal Complex Projects Awards Reports Help Center

1. Grants Sub-navigator bar

Root > Grants > Funding Proposal

Components Properties Permissions

Funding Proposal

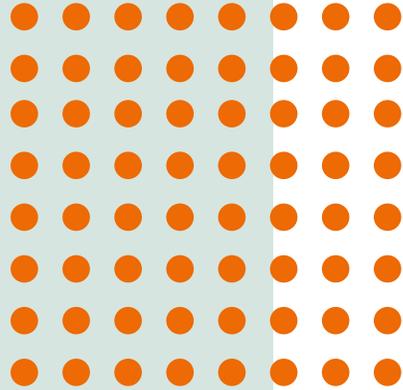
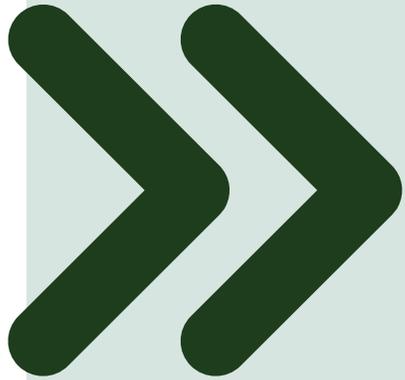
Search ?

Create Funding Proposal

Proposals Draft Internal Review Sponsor Review Awarded Completed

2. Tabs

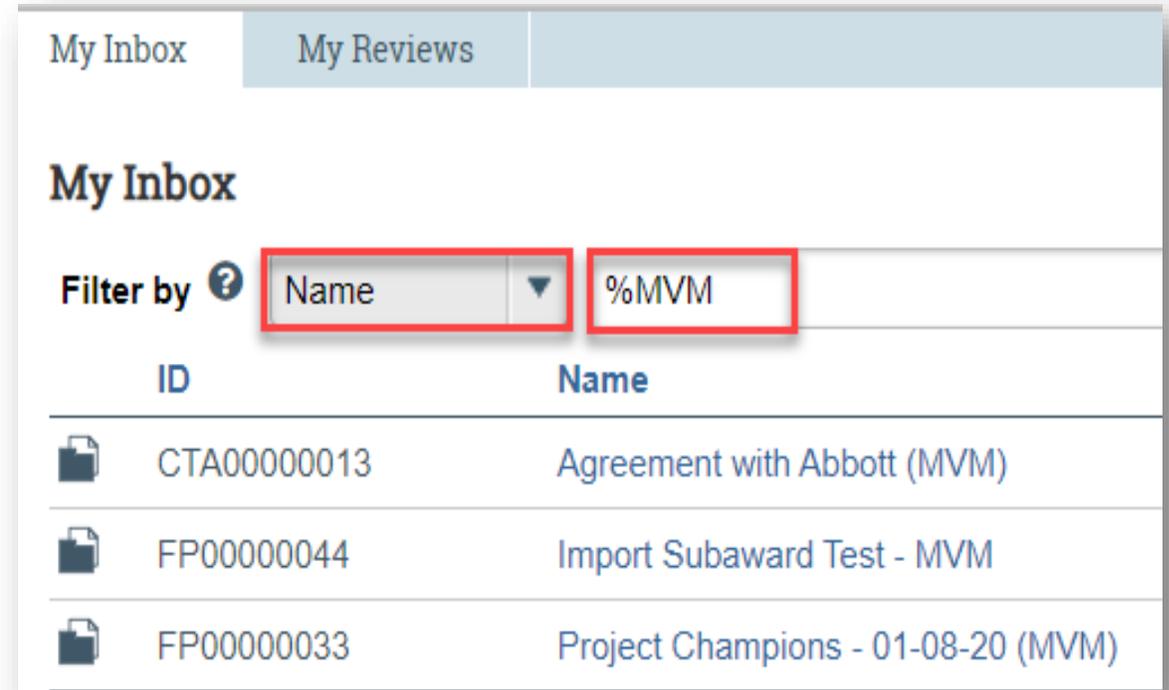
1. The sub-navigator bar organizes the page into the different project types
2. The tabs represent different states throughout the workflow
 - The first tab contains a list of all records, regardless of the state



How to Search for Records

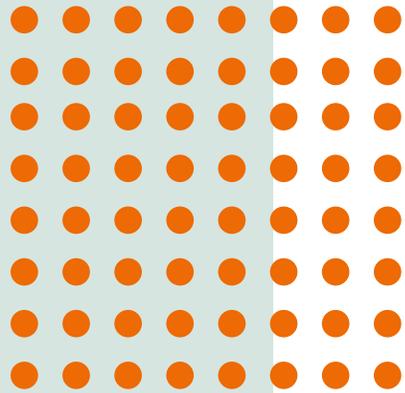
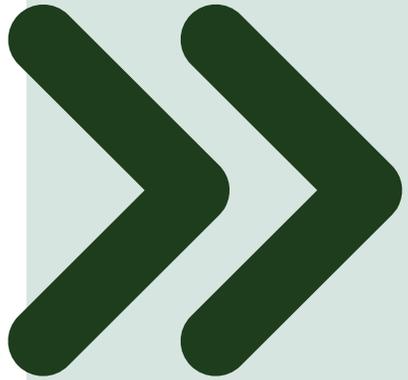
How to Search for Records

1. **Use the Filter by field** to search for a record by various information, such as:
 - ID
 - Name
 - State
2. **Search for key words** – Use the wild card feature by entering a “%” sign before and after the keyword



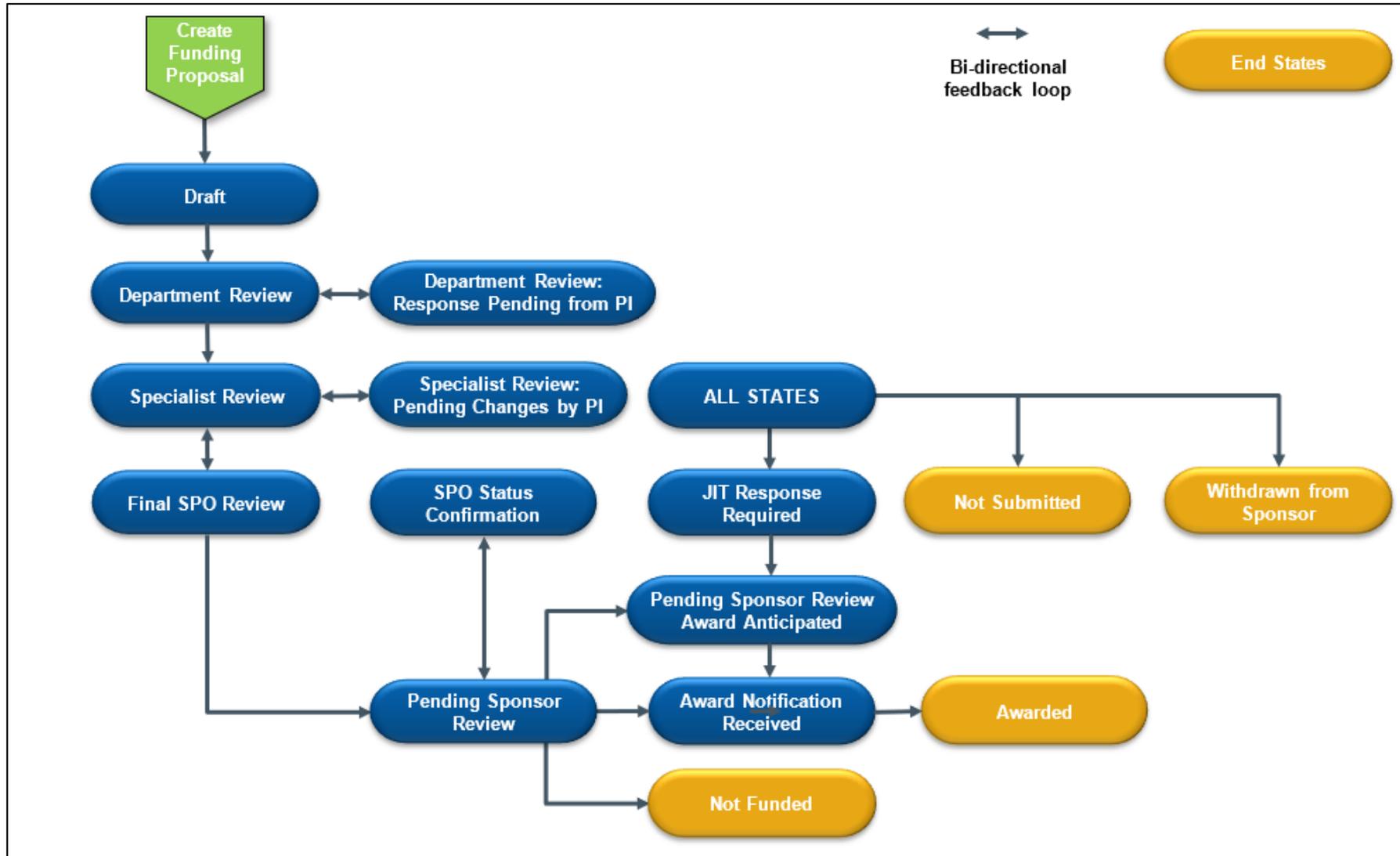
The screenshot shows a web application interface with two tabs: "My Inbox" and "My Reviews". The "My Inbox" tab is active. Below the tabs, there is a "Filter by" section with a dropdown menu set to "Name" and a search input field containing "%MVM". Below the filter, there is a table with two columns: "ID" and "Name". The table contains three rows of records, each with a document icon to the left of the ID.

ID	Name
CTA00000013	Agreement with Abbott (MVM)
FP00000044	Import Subaward Test - MVM
FP00000033	Project Champions - 01-08-20 (MVM)

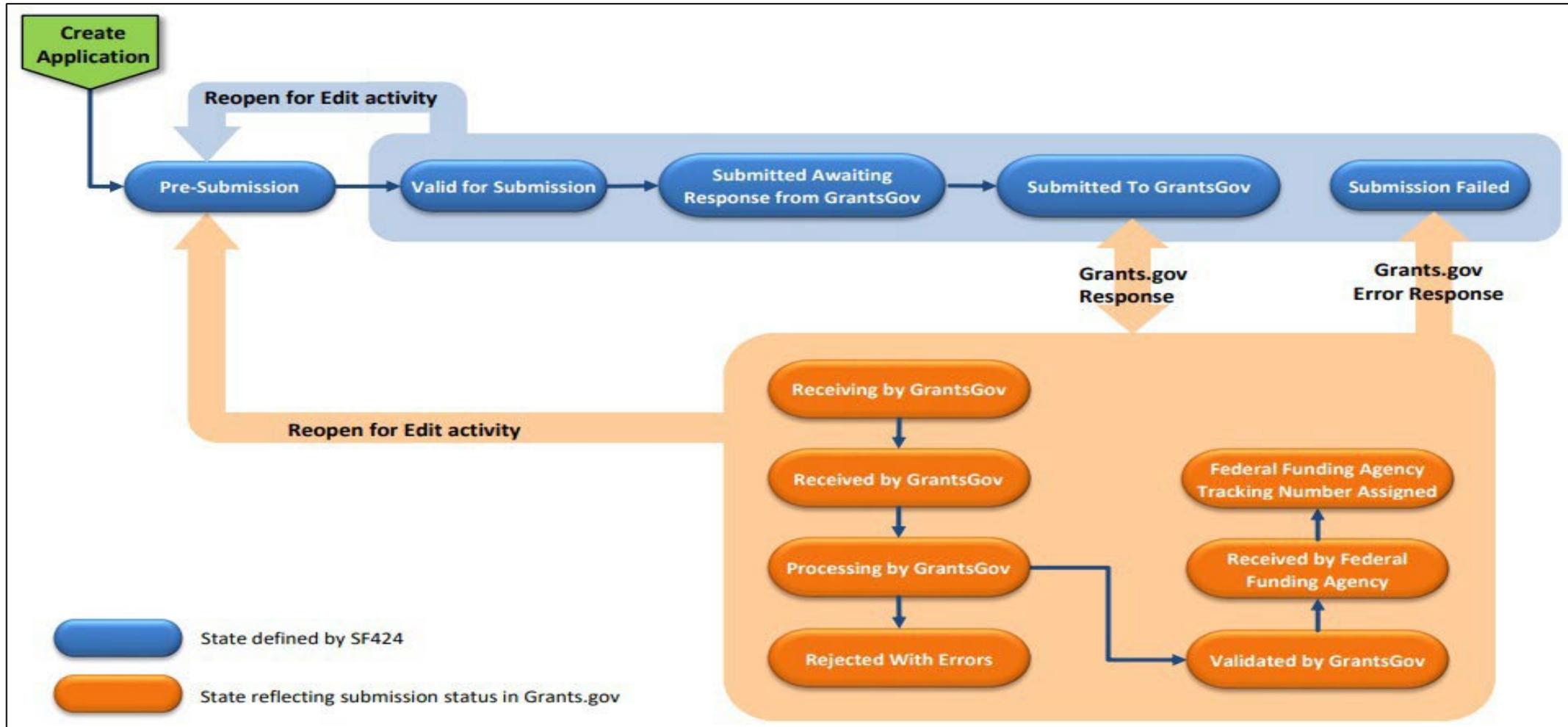


Understanding the Workflow

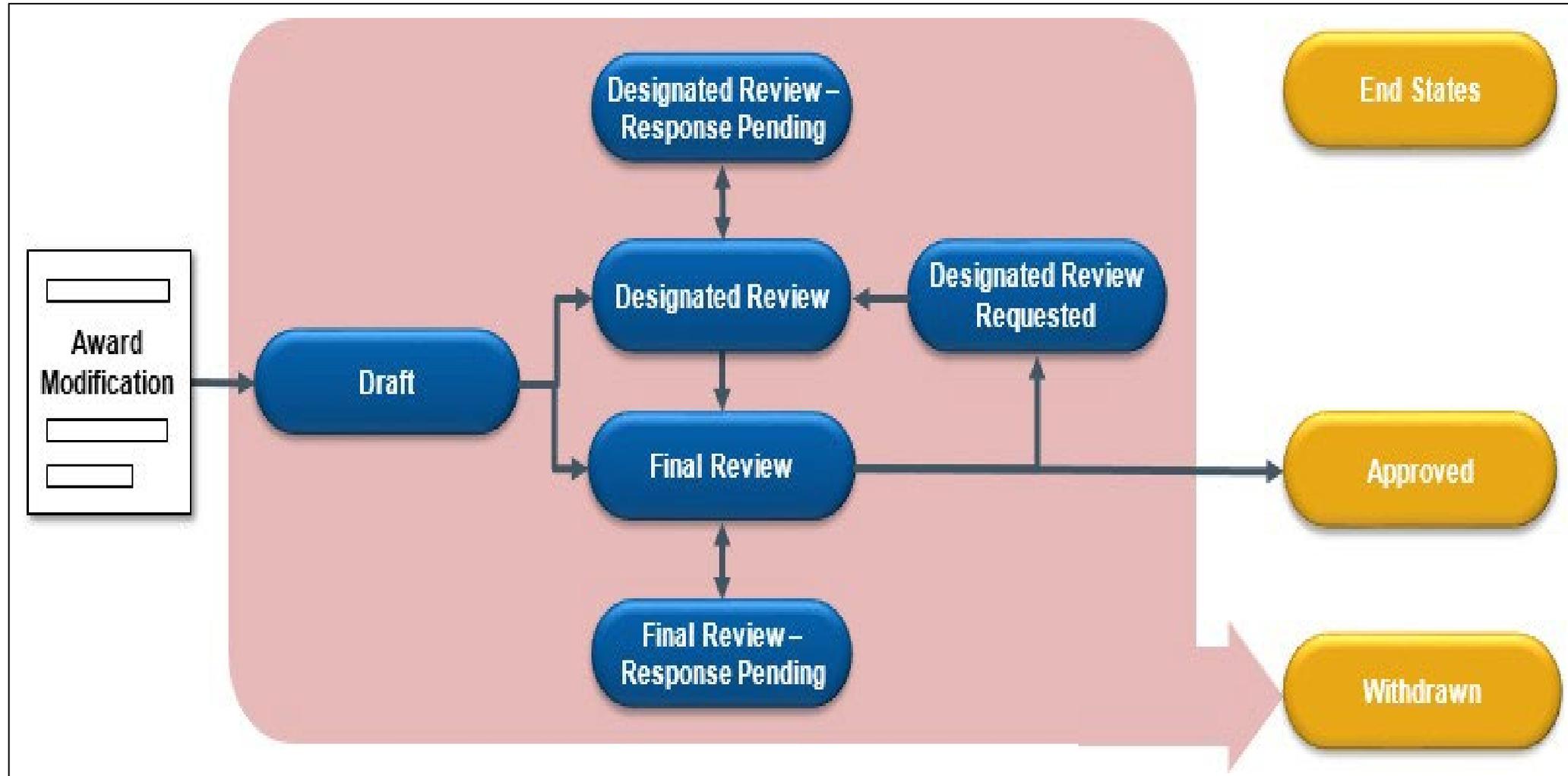
Proposal Workflow

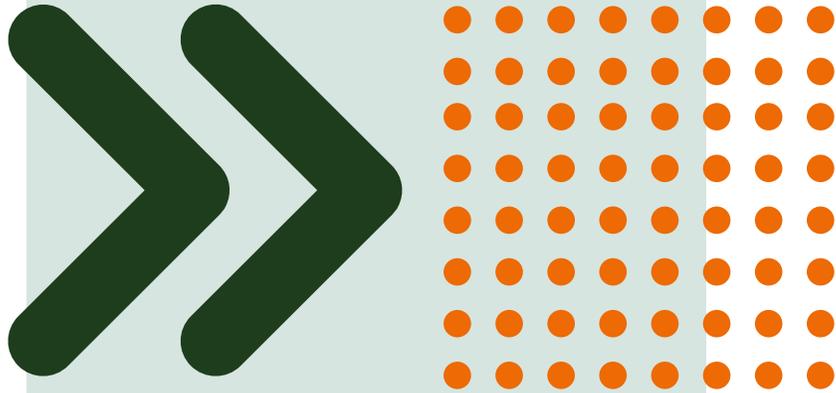


System to System Through Grants.gov



Award Modification by State

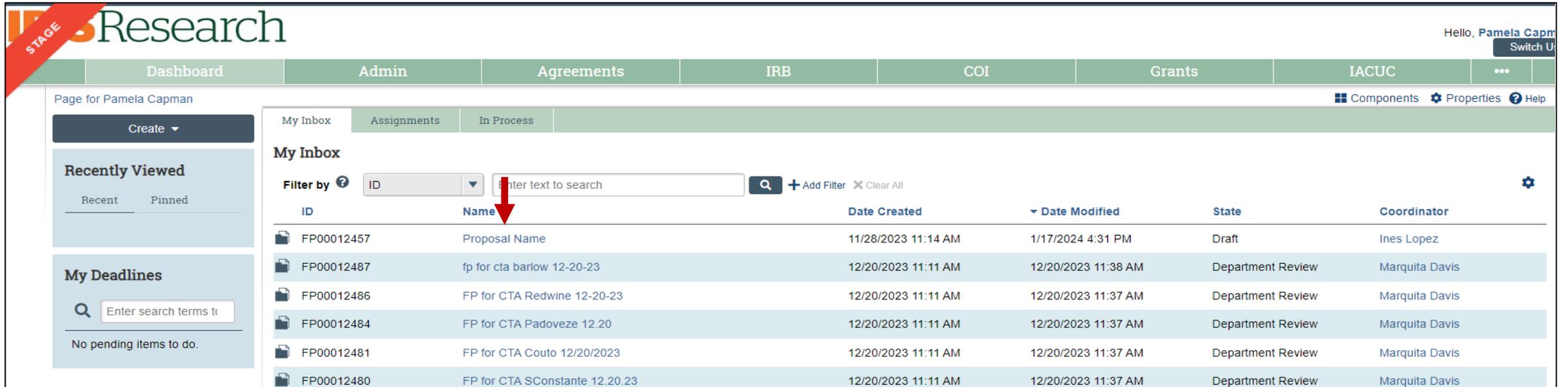




Understanding the Workspace

To Access the Workspace

From the Dashboard Inbox, or Grants pages, click on the name of a record to access the project's Workspace

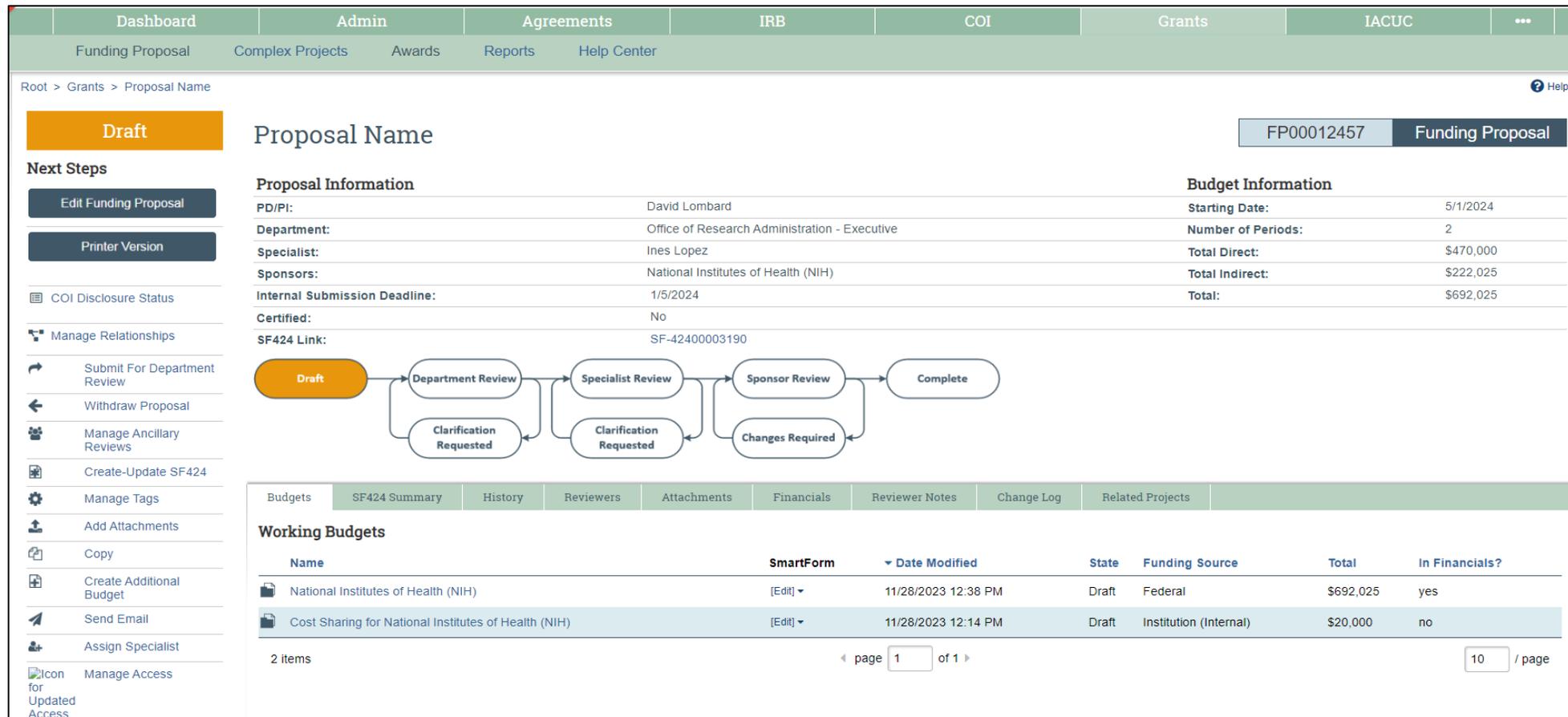


The screenshot shows the IIR Research dashboard for Pamela Capman. The main navigation bar includes Dashboard, Admin, Agreements, IRB, COI, Grants, and IACUC. The 'My Inbox' section is active, displaying a table of records. A red arrow points to the 'Name' column header in the table.

ID	Name	Date Created	Date Modified	State	Coordinator
FP00012457	Proposal Name	11/28/2023 11:14 AM	1/17/2024 4:31 PM	Draft	Ines Lopez
FP00012487	fp for cta barlow 12-20-23	12/20/2023 11:11 AM	12/20/2023 11:38 AM	Department Review	Marquita Davis
FP00012486	FP for CTA Redwine 12-20-23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
FP00012484	FP for CTA Padoveze 12.20	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
FP00012481	FP for CTA Couto 12/20/2023	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis
FP00012480	FP for CTA SConstante 12.20.23	12/20/2023 11:11 AM	12/20/2023 11:37 AM	Department Review	Marquita Davis

Workspace

Workspace: Refers to the page from where you can navigate and initiate activities.

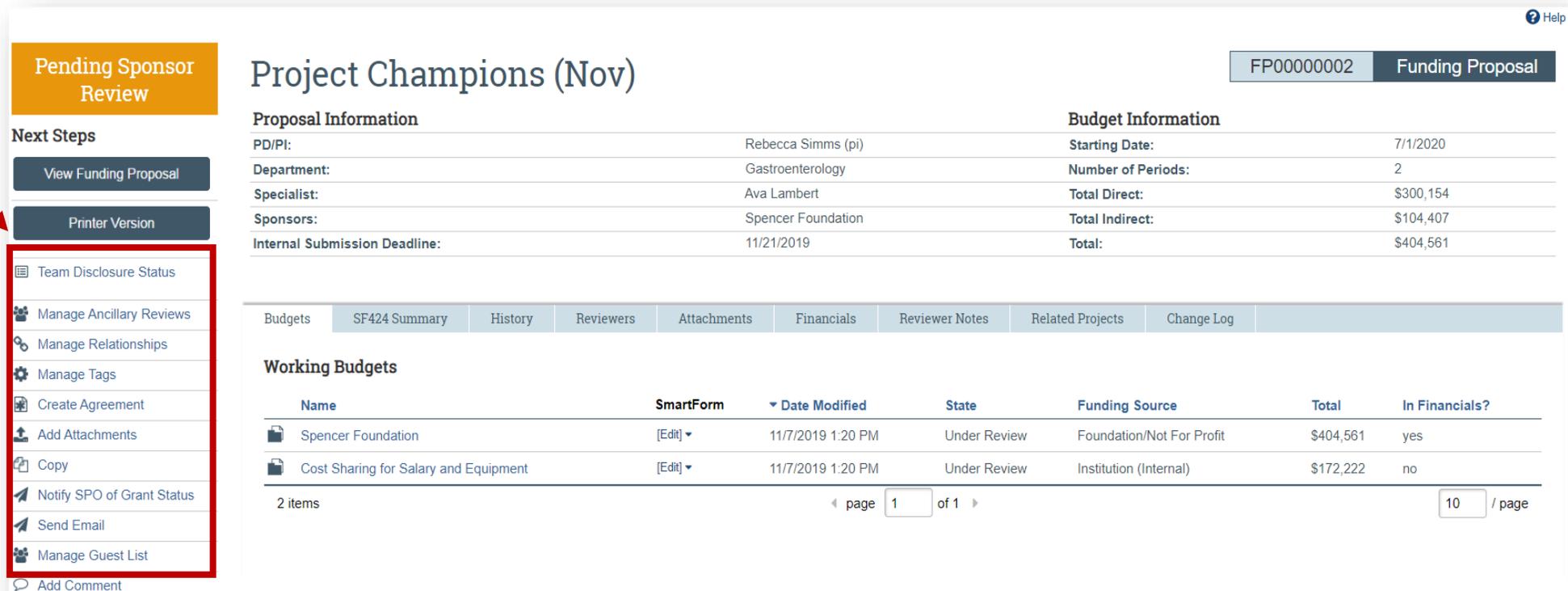


The screenshot displays the 'Workspace' interface for a 'Draft' proposal. The top navigation bar includes 'Dashboard', 'Admin', 'Agreements', 'IRB', 'COI', 'Grants', and 'IACUC'. Below this, a secondary bar shows 'Funding Proposal', 'Complex Projects', 'Awards', 'Reports', and 'Help Center'. The main content area is titled 'Proposal Name' and includes a 'Draft' status indicator and a 'Funding Proposal' ID 'FP00012457'. The 'Next Steps' section on the left lists actions like 'Edit Funding Proposal' and 'Printer Version'. The 'Proposal Information' section provides details for the PD/PI (David Lombard), Department (Office of Research Administration - Executive), Specialist (Ines Lopez), Sponsors (National Institutes of Health (NIH)), Internal Submission Deadline (1/5/2024), and Certified status (No). The 'Budget Information' section shows a Starting Date of 5/1/2024, 2 periods, and a total budget of \$692,025. A flowchart illustrates the review process: Draft -> Department Review -> Specialist Review -> Sponsor Review -> Complete, with feedback loops for 'Clarification Requested' and 'Changes Required'. Below the flowchart, a 'Working Budgets' table lists two budget items: 'National Institutes of Health (NIH)' and 'Cost Sharing for National Institutes of Health (NIH)'. The table includes columns for Name, SmartForm, Date Modified, State, Funding Source, Total, and In Financials?.

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
National Institutes of Health (NIH)	[Edit]	11/28/2023 12:38 PM	Draft	Federal	\$692,025	yes
Cost Sharing for National Institutes of Health (NIH)	[Edit]	11/28/2023 12:14 PM	Draft	Institution (Internal)	\$20,000	no

Activities

Activities: The tasks listed on the left side of the screen on the workspace. They are based on security roles.



Activities

Pending Sponsor Review

Next Steps

- View Funding Proposal
- Printer Version

- Team Disclosure Status
- Manage Ancillary Reviews
- Manage Relationships
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Notify SPO of Grant Status
- Send Email
- Manage Guest List
- Add Comment

Project Champions (Nov)

FP00000002 Funding Proposal

Proposal Information		Budget Information	
PD/PI:	Rebecca Simms (pi)	Starting Date:	7/1/2020
Department:	Gastroenterology	Number of Periods:	2
Specialist:	Ava Lambert	Total Direct:	\$300,154
Sponsors:	Spencer Foundation	Total Indirect:	\$104,407
Internal Submission Deadline:	11/21/2019	Total:	\$404,561

Budgets | SF424 Summary | History | Reviewers | Attachments | Financials | Reviewer Notes | Related Projects | Change Log

Working Budgets

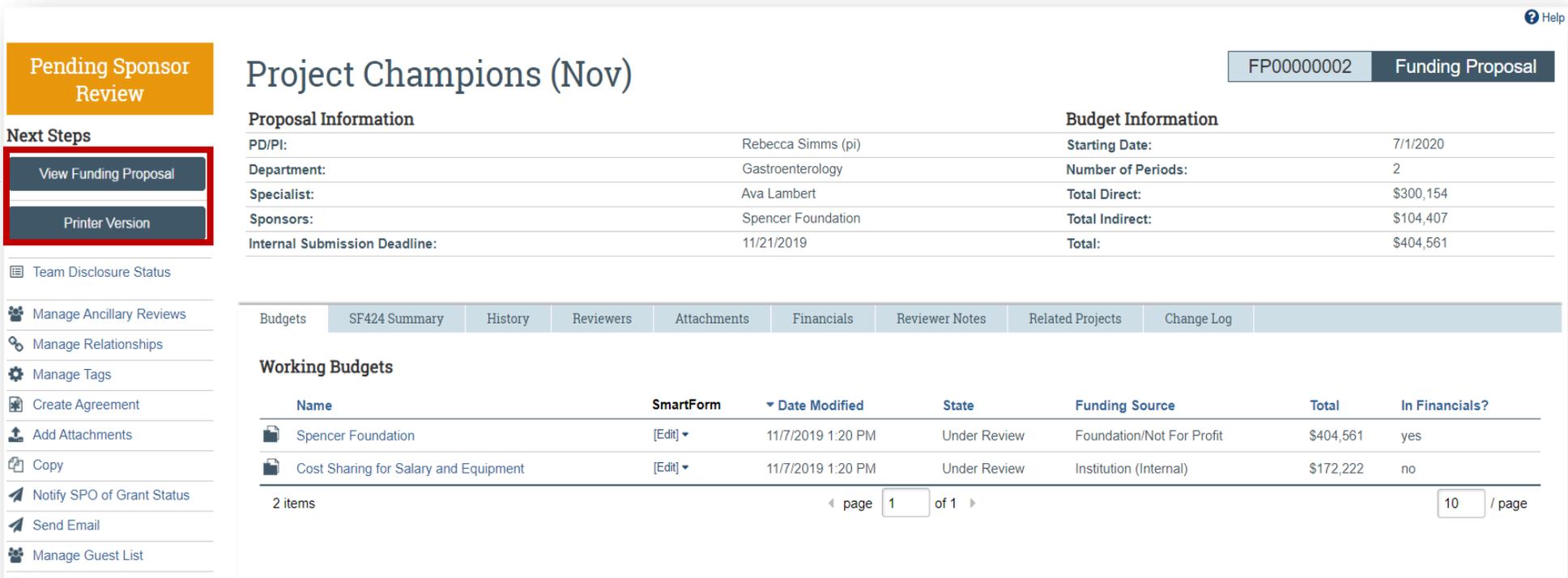
Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
Spencer Foundation	[Edit]	11/7/2019 1:20 PM	Under Review	Foundation/Not For Profit	\$404,561	yes
Cost Sharing for Salary and Equipment	[Edit]	11/7/2019 1:20 PM	Under Review	Institution (Internal)	\$172,222	no

2 items | page 1 of 1 | 10 / page

Actions

Actions: Blue buttons found on the left and listed above activities on the workspace. They are based on security roles.

Actions



Pending Sponsor Review

Next Steps

- View Funding Proposal
- Printer Version

Team Disclosure Status

Manage Ancillary Reviews

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Copy

Notify SPO of Grant Status

Send Email

Manage Guest List

Add Comment

Project Champions (Nov)

FP00000002 Funding Proposal

Proposal Information		Budget Information	
PD/PI:	Rebecca Simms (pi)	Starting Date:	7/1/2020
Department:	Gastroenterology	Number of Periods:	2
Specialist:	Ava Lambert	Total Direct:	\$300,154
Sponsors:	Spencer Foundation	Total Indirect:	\$104,407
Internal Submission Deadline:	11/21/2019	Total:	\$404,561

Budgets | SF424 Summary | History | Reviewers | Attachments | Financials | Reviewer Notes | Related Projects | Change Log

Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
Spencer Foundation	[Edit]	11/7/2019 1:20 PM	Under Review	Foundation/Not For Profit	\$404,561	yes
Cost Sharing for Salary and Equipment	[Edit]	11/7/2019 1:20 PM	Under Review	Institution (Internal)	\$172,222	no

2 items | page 1 of 1 | 10 / page

State: Refers to the status of the record in the workflow. It gives you a clue about what to do next.

State → Pending Sponsor Review

Project Champions (Nov) FP00000002 Funding Proposal

Proposal Information		Budget Information	
PD/PI:	Rebecca Simms (pi)	Starting Date:	7/1/2020
Department:	Gastroenterology	Number of Periods:	2
Specialist:	Ava Lambert	Total Direct:	\$300,154
Sponsors:	Spencer Foundation	Total Indirect:	\$104,407
Internal Submission Deadline:	11/21/2019	Total:	\$404,561

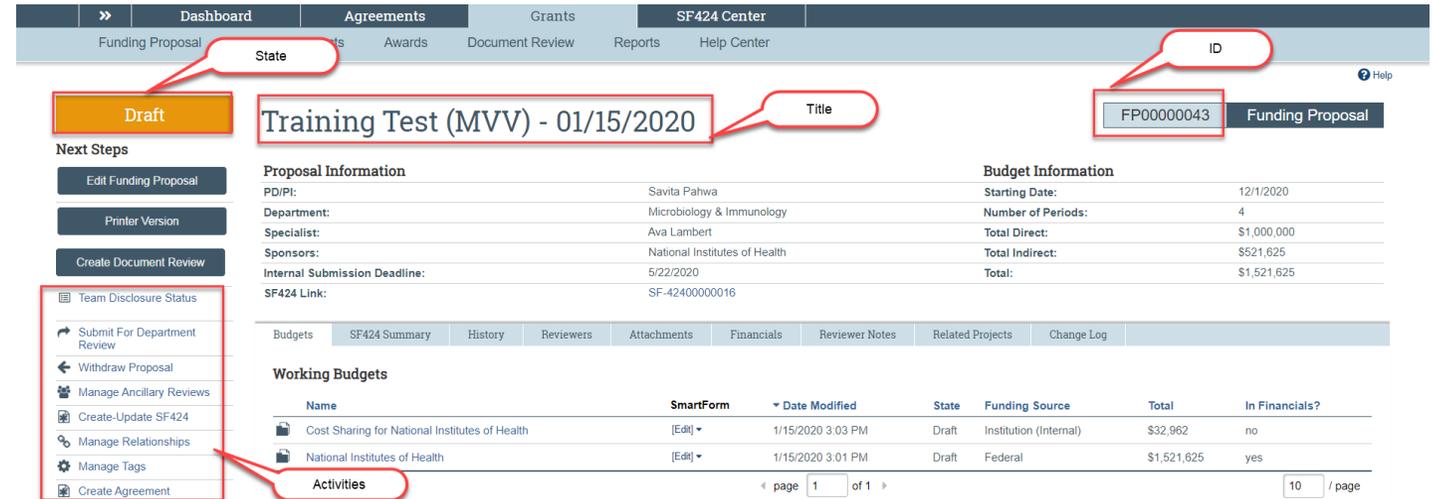
Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
Spencer Foundation	[Edit]	11/7/2019 1:20 PM	Under Review	Foundation/Not For Profit	\$404,561	yes
Cost Sharing for Salary and Equipment	[Edit]	11/7/2019 1:20 PM	Under Review	Institution (Internal)	\$172,222	no

2 items page 1 of 1 10 / page

Project Workspace

The information displayed on the workspace is dependent upon the state and the user role



The screenshot shows the Project Workspace interface for a 'Draft' state funding proposal. The interface includes a navigation menu, a 'Next Steps' section, 'Proposal Information', 'Budget Information', and a 'Working Budgets' table. Red callouts highlight the 'Draft' state, the title 'Training Test (MVV) - 01/15/2020', the ID 'FP00000043', and the 'Activities' tab.

Next Steps

- Edit Funding Proposal
- Printer Version
- Create Document Review

Proposal Information

PDI/PI:	Savita Pahwa
Department:	Microbiology & Immunology
Specialist:	Ava Lambert
Sponsors:	National Institutes of Health
Internal Submission Deadline:	5/22/2020
SF424 Link:	SF-4240000016

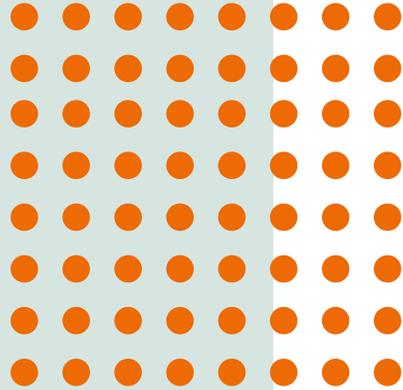
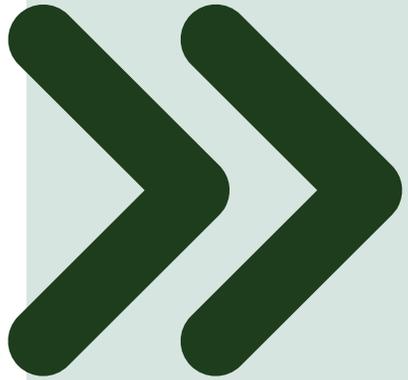
Budget Information

Starting Date:	12/1/2020
Number of Periods:	4
Total Direct:	\$1,000,000
Total Indirect:	\$521,625
Total:	\$1,521,625

Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
Cost Sharing for National Institutes of Health	[Edit]	1/15/2020 3:03 PM	Draft	Institution (Internal)	\$32,962	no
National Institutes of Health	[Edit]	1/15/2020 3:01 PM	Draft	Federal	\$1,521,625	yes

The tabs displayed on the workspace are specific to the record type (e.g. Proposal, Award, etc.) and contain additional details about the record, including history, reviewers, and attachments



SmartForm

IBISResearch

Validate Compare

You Are Here: Proposal Name
Editing: FP00012457

General Proposal Information

1. **Type of application:**
New
a. Is this award being transferred from another institution?
 Yes No [Clear](#)

2. * **Short title of proposal:**

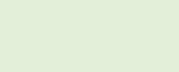
3. * **Long title of proposal:**

4. * **Program director / Principal investigator / Project lead / Fellow:**  
David Lombard 

5. * **Select the direct sponsor:**
National Institutes of Health (NIH) 
a. If the direct sponsor is not listed, type their name here:

b. If this will be a flow-through, select prime sponsor:
 

[Continue](#) 

- The SmartForm is a series of pages you complete with information about the record.
- Proposals, Budgets, Awards, Subawards, Award Modification Requests, and Award Modifications have unique SmartForms
- Once the General Information is added you click continue and the additional SmartPages will appear based on the information provided.
- A red asterisk  next to a question indicates the field is required.
- Click the Help icon question mark  for more information.

Remember to Validate!

- Validate is in the upper right-hand corner.
- If there is anything that the system recognizes you missed, you will receive an error message.
- Click on the error message, which will take you to the error.
- Fix, save, and refresh the validate message.
- This step is often overlooked, and the proposal has to be returned.
- This causes extra time for everyone.



IBIS Research

Validate Compare

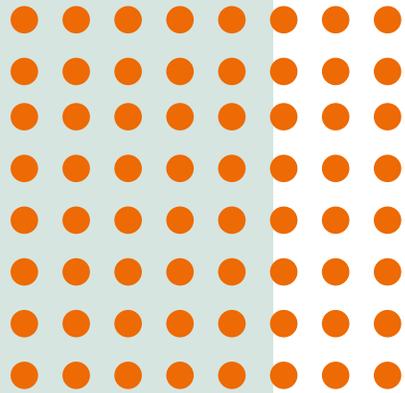
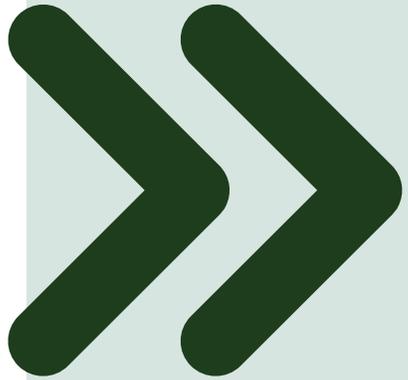
You Are Here: capman test FP 6/26/24

Editing: FP00013959

General Proposal Information

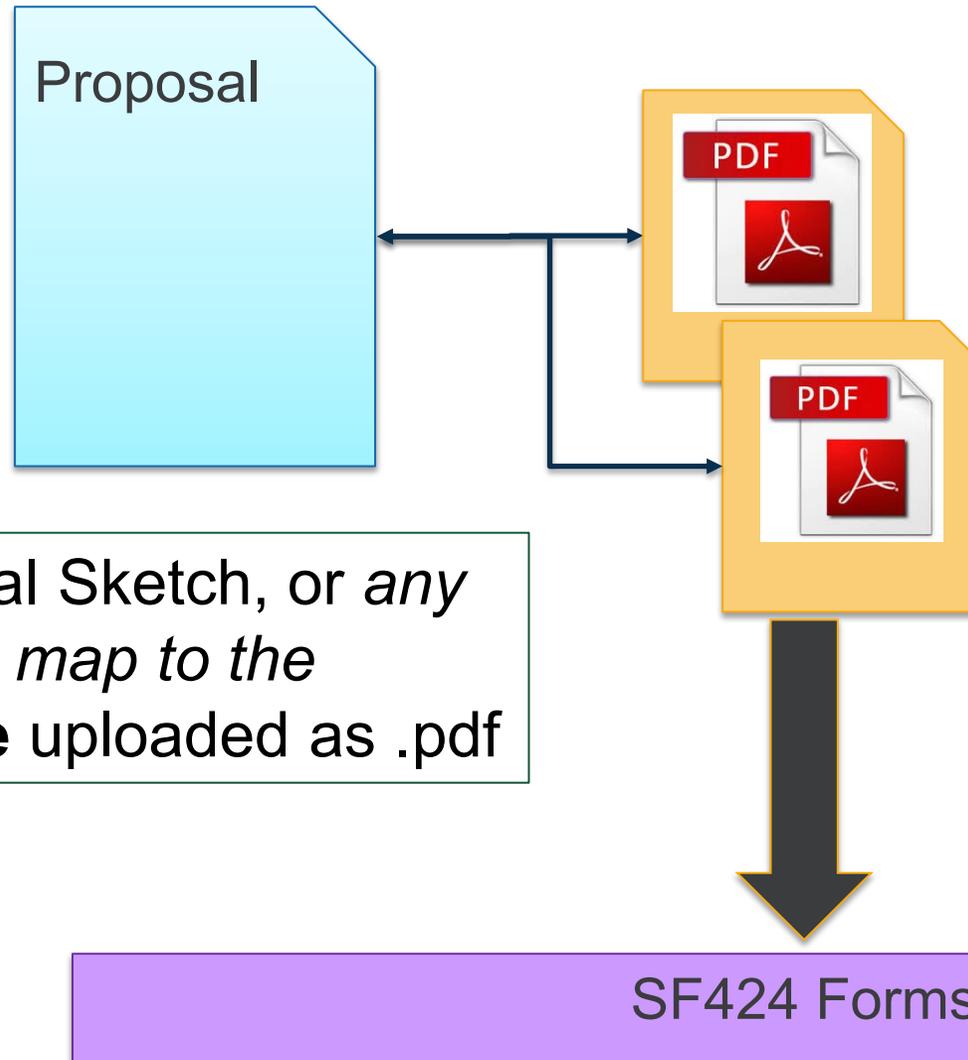
1. Type of application:
New

a. Is this award being transferred from another institution?
 Yes No [Clear](#)

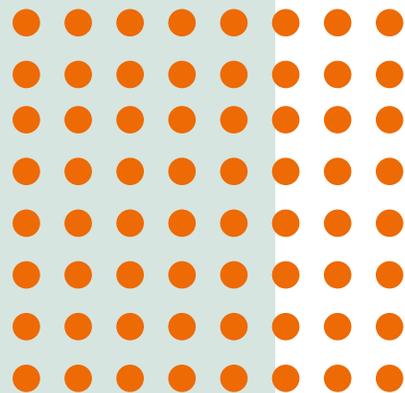
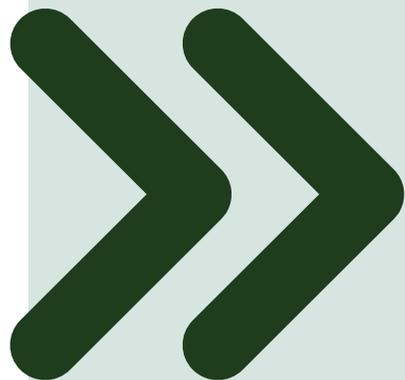


Uploading Documents

Uploading Documents that Map to SF424



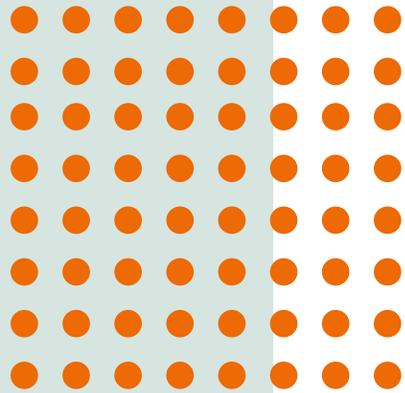
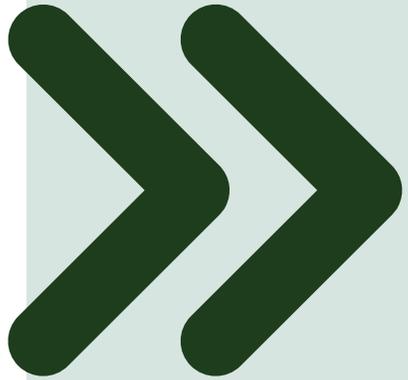
The Biographical Sketch, or *any documents that map to the SF424* **must be** uploaded as .pdf



Understanding User Roles

Roles - Responsibilities

System User Roles	Responsibility
Study Staff (Department Role)	<ul style="list-style-type: none">• Creates and submits proposals• All users in IBISResearch have this role
Department Reviewer (Department Role)	<ul style="list-style-type: none">• Approves proposals and documentation when part of a workflow. Creates ancillary reviews as needed• Also includes administrators who create and manage proposals on behalf of departments
Specialists (ORA Role)	Create and manage proposals, awards, and award modifications
Award Approver (ORA Role)	Activate and approve awards or award modifications in Final Review



Understanding Email Notifications

Understanding Email Notifications

Many activities and state transitions within the workflows trigger email notification

- Proposals, awards, award modifications, and subawards

Email notifications will only be sent to **University of Miami email addresses**

If you need to send an email to someone through the IBISResearch system that is not in the system, use Outlook



Proposal Email Notification Example



Trigger 	Sent To 
Manage Ancillary Review activity	Assigned Ancillary reviewers
Send Email activity	Recipients selected in the activity
State transition from “Department Review” to “Department Review: Response Pending from PI”	PI, Administrative Contact
State transition from “Final SPO Review” to “Pending Sponsor Review” (with or without a SF424 submission)	PI
State transition to “JIT Response Required”	PI, Administrative Contact
State transition from “Draft” to “Department Review”	Department Reviewers
State transition to “Not Submitted”	PI
State transition from “Specialist Review” to “Specialist Review: Pending changes from PI”	PI, Administrative Contact
State transition from Department Review: Response Pending from PI” to Department Review”	Departmental Reviewers
Award Letter Received activity	Assigned Specialist, proposal editors, proposal readers
Notify SPO of Grant Status activity	Assigned Specialist

Ancillary Review Email Notification Example

Refer to the Grants Ancillary Review Matrix



Ancillary Review Matrix Grants

Ancillary Review Type	Initiator	Approver	Response Required?	Required Documents/Information	Person or Organization	Selection
Compliance (COI)	ORA	VPR/EDR	Y	Read and follow the Conflict of Interest in Research Policy . <ul style="list-style-type: none"> • Include a letter disclosing the potential conflict • Attach to Ancillary Review 	N/A	This is for SBIR/STTR only and generated by ORA.
Cost Share	Department	VPR/EDR	Y	Read and follow the Cost Sharing Policy . <ul style="list-style-type: none"> • Completed Cost Share Budget • Justification letter for the Cost Share • NEW REQUIRED: Cost Share Form (must be included on attachments) <i>*Note: When requesting cost share voluntary or mandatory please include sponsor details in addition to the waiver and NEW required cost share form in the attachments.</i>	Person	Gables or RSMAS : Laura Kozma Medical : Patricia Wahl for Dr. Schulman
Department Chair/Center Director (as PI)	Department	Dean/Dean Designee	Y	<ul style="list-style-type: none"> • Include a justification comment for approval in the ancillary review. <i>* Note: If an approver noted here is the PI, the Proposal requires approval from a higher level.</i>	Person	Medical : Carl Schulman RSMAS : Roni Avissar A&S : Leonidas Bachas Engineering : Helena Solo-Gabriele
Export Controls	Department/ORA	William Collins	Y	Read and follow the Export Control Policy . <ul style="list-style-type: none"> • Letter disclosing export control concerns • Attach to Ancillary Review 	Person	William (Bill) Collins
Indirect Cost Waiver	Department	VPR/EDR	Y	Read and follow the F&A Waiver Policy . <ul style="list-style-type: none"> • Justification letter • NEW REQUIRED: Indirect Cost Waiver Form (must be included on attachments) 	Person	Gables or RSMAS : "Provosts Office" (CC00372) on the Organization Medical : Carl Schulman
Late Proposal Submission	Department	VPR/EDR	Y	Required documents/Information: <ul style="list-style-type: none"> • Read and follow the Proposal Exception Process • Include a justification and supporting documentation • Request must be submitted in advance of the ORA deadline 	Person	Medical , Gables and RSMAS : Laura Kozma
Nepotism/Familial Relationship	Department	VPR/EDR	Y	Read and follow the Nepotism in Research Policy . <ul style="list-style-type: none"> • Include a Nepotism Memo • Attach to Ancillary Review 	Person	Medical , Gables and RSMAS : Laura Kozma
PI Eligibility	Department	VPR/EDR	Y	Read and follow PI Eligibility Policy . For Case By Case Exceptions: <ul style="list-style-type: none"> • Commitment/Letter of Support. • Attach to Ancillary Review 	Person	Medical , Gables and RSMAS : Laura Kozma

<https://www.research.miami.edu/systems/index.html>

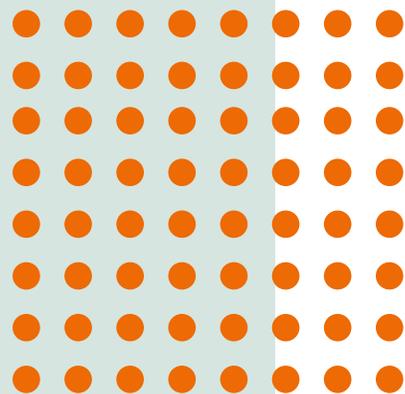
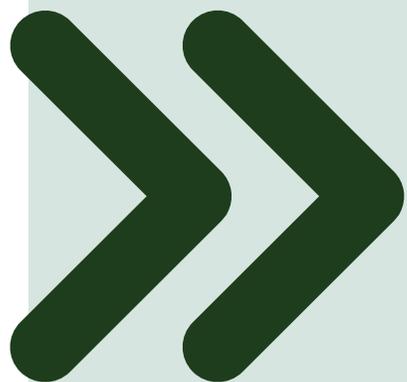
Award Email Notification Example



Trigger	Sent To
Manage Ancillary Reviews	Assigned Ancillary Reviewers
Send Email activity	Recipients selected in activity window
30 Day Reminder	Deliverables owner responsible party, and any other staff selected to receive notifications
60 day Reminder	Deliverables owner responsible party, and any other staff selected to receive notifications
Activate activity (When Award is activated)	Assign Specialist, PI, Administrative Contact
Activate activity (When Award has an Advance Account)	Assign Specialist, PI, Administrative Contact
Assign Award Approver activity	Award Approver
State transition from “Draft” to “Department edit”	Award Editors, Assigned Specialist
Request Changes from Specialist activity (In Designated Review state)	Assigned Specialist

Award Modification Request Email Notification Trigger/Sent To

Trigger	Sent To
Approve activity	Submitter of the award modification request
Request Clarifications activity	Submitter of the award modification request
Submit Clarifications activity	Assigned Specialist
Decline activity	Submitter of the award modification request
Assign Specialist activity	Assigned Specialist
Submit to Specialist activity	Assigned Specialist
Assign Submitter activity	Submitter of the award modification request
Withdraw	Assigned Specialist



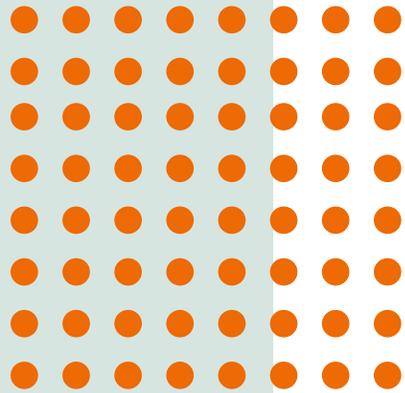
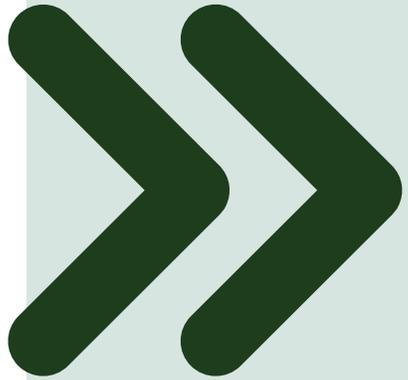
Understanding ID Numbers

Understanding ID Numbers

Each record in IBISResearch contains a **unique ID** that can be used to easily identify the type of record in lists and reports.

Examples:

IBISResearch Module	Acronym	ID Example	Definition
Grants	FP	FP 00000087	Funding Proposal
	IBIS	IBIS 00000054	Award – This is Funding Award in IBISResearch
	AWD		Awards which migrated over from Workday begin with “ AWD ”
	BU	BU 00000083	Budget – This could include the UM Project Budget, Subaward Budget(s), Cost Share Budget(s).
	SF424	SF-424 00000029	SF424 Application



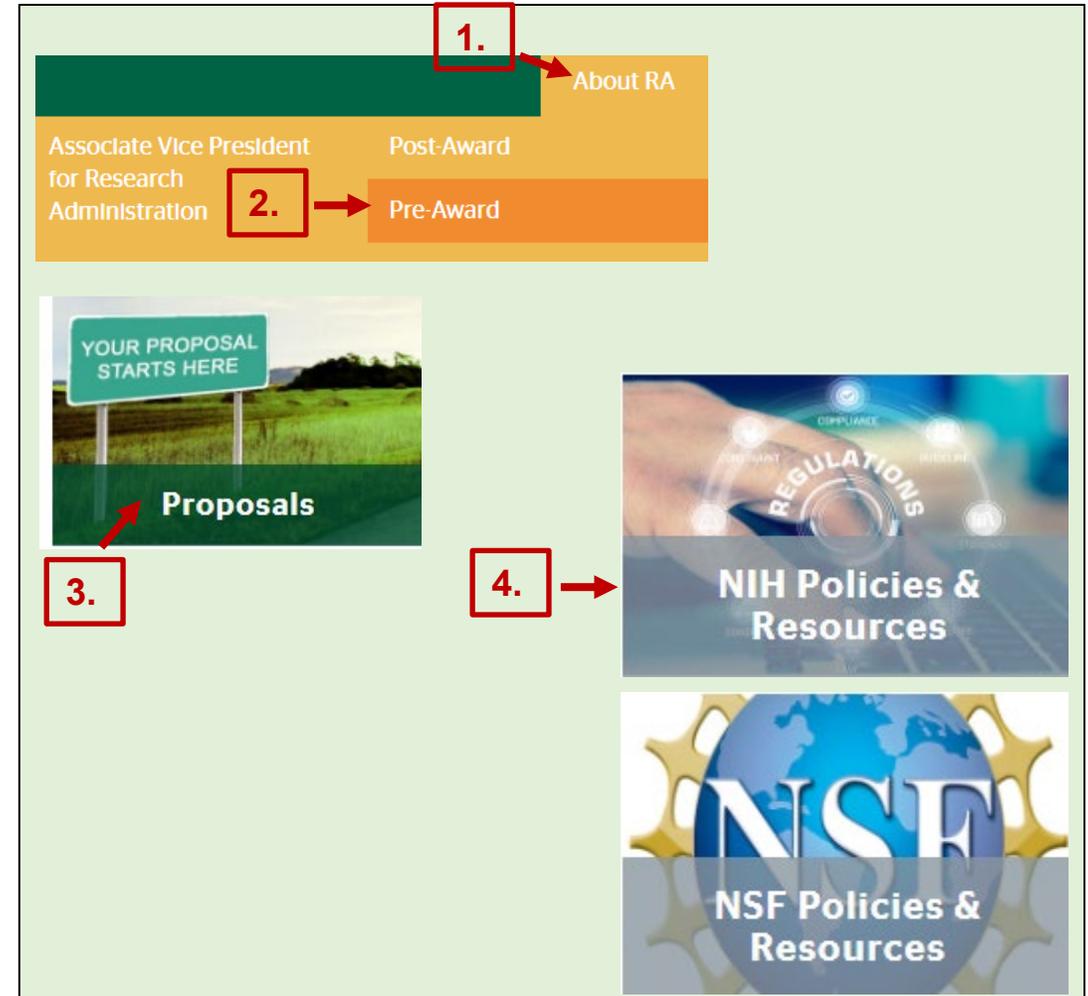
Sponsors' Policies

Find the policies/guidelines/instructions

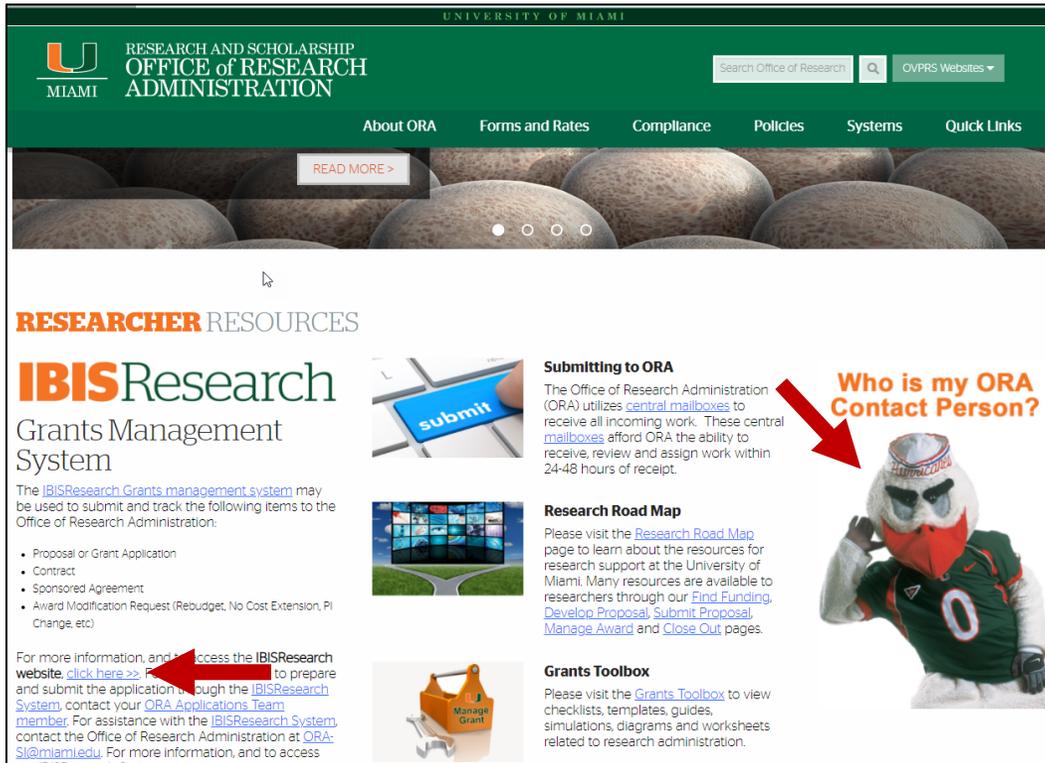
Always follow the funding opportunity guidelines and/or application instructions.

Helpful information can be found on ora.miami.edu

1. About RA
2. Pre-Award
3. Proposals



Resources



UNIVERSITY OF MIAMI

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RESEARCHER RESOURCES

IBISResearch

Grants Management System

The [IBISResearch Grants management system](#) may be used to submit and track the following items to the Office of Research Administration:

- Proposal or Grant Application
- Contract
- Sponsored Agreement
- Award Modification Request (Rebudget, No Cost Extension, PI Change, etc)

For more information, and to access the [IBISResearch website](#), [click here >>](#) to prepare and submit the application through the [IBISResearch System](#), contact your [ORA Applications Team member](#). For assistance with the [IBISResearch System](#), contact the Office of Research Administration at ORA_Si@miami.edu. For more information, and to access the [IBISResearch System](#), [click here >>](#)

Submitting to ORA

The Office of Research Administration (ORA) utilizes [central mailboxes](#) to receive all incoming work. These central [mailboxes](#) afford ORA the ability to receive, review and assign work within 24-48 hours of receipt.

Who is my ORA Contact Person?



Research Road Map

Please visit the [Research Road Map](#) page to learn about the resources for research support at the University of Miami. Many resources are available to researchers through our [Find Funding](#), [Develop Proposal](#), [Submit Proposal](#), [Manage Award](#) and [Close Out](#) pages.

Grants Toolbox

Please visit the [Grants Toolbox](#) to view checklists, templates, guides, simulations, diagrams and worksheets related to research administration.



<https://www.ora.Miami.edu/>



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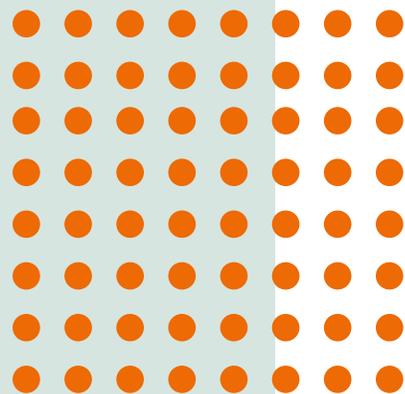
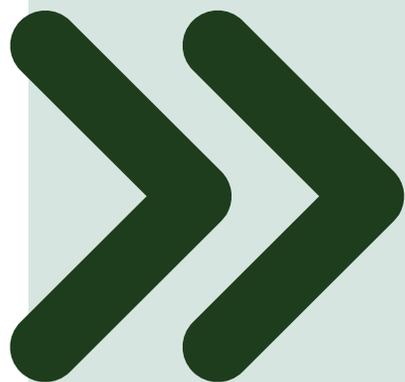
OVPRS Help Desk

- Phone: 305-243-2314
- Email: OVPRShelpdesk@miami.edu



Questions





Embrace
YOUR
Journey

Hands-On